Minnesota State Colleges and Universities

Submittals (SUB)

For more information contact Minnesota State Colleges and Universities
System Office e-Builder Support Team

Cherie Coughlin
Cherie.coughlin@minnstate.edu
(651) 201-1586

Mailor Moua
Mailor.moua@minnstate.edu
(651)-201-1782

Website:
http://www.minnstate.edu/system/finance/facilities/design-construction/index.html
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Submittals (SUB)
Process to route submittal from Contractor to AE for review.

Start Submittals process (Contractor starts Submittal Process)

1. Click **Projects** from the Top Navigation tabs.

2. Select the Project

3. Select **Processes** from the Project Menu
4. Select **Start Process**

![Select Start Process](image)

5. Select the **Submittal (SUB)** Process from the list.

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance Tracker (INS)</td>
<td>Process used to supply and track insurance coverage information/expiration dates.</td>
</tr>
<tr>
<td>Payment Application (PA)</td>
<td>Process for routing Construction Payment Applications (including Final Payment)</td>
</tr>
<tr>
<td>Request for information (RFI2)</td>
<td>NEW RFI Process (w/Spawned PR or CCD): Contractors, Construction Manager, and Haz Mat Contractors shall use this Process to issue a Request for Information (RFI) to Architects. Dependent upon selected &quot;Response Type&quot; this process may spawn CCD or PR.</td>
</tr>
</tbody>
</table>

![Select Submittal Process](image)

6. Fill out all the fields on the page.
   
   a. Enter Subject
   b. Enter Submittal Number
   c. Enter Description
   d. Select Category
   e. Enter Date Submitted
   f. Upload Submittal if more than one document, upload the rest into the Attached Documents tab.

![Fill Out Submittal Fields](image)
A/E Review (AE)

1. Review all information on the page including documents in the Attached Documents tab.
2. Click “Please select an action” and select an action. Click Take Action to move to the next step.
   a. Actions:
      i. Req Review – Action to route workflow to AE Sub to review.
         • Choose a user to add to next step.
         • Select User from the Available Users box.
         • Click the arrow to move user to the Selected Users box
         • Click Req Review

      ii. Forward – If “PM Review Req?” is “Yes” Forward action will route workflow to PM Review.
         If “PM Review Req?” is “No” Forward action will route to Contractor to review and Close
      iii. Revise – Action to route workflow back to the initiator to revise.
      iv. VOID – Action to void the workflow process
Other Review (AE Sub or Consultant-Other)

AE Sub or Consultant-Other review and comment on the submittal than respond back to the AE.

1. Review all information on the page including documents in the Attached Documents tab.
2. Add comment under the Comments tab
3. Click Take Action on Respond to route it back to the AE.
**PM Review (PM)**

1. Review all information on the page including documents in the **Attached Documents** tab. Add comments in the **Comment** tab.
2. Select “**Review**” action, Click **Take Action** to route to the AE.

### Submittals (SUB) - 4

<table>
<thead>
<tr>
<th>Details</th>
<th>Comments (0)</th>
<th>Attached Documents (1)</th>
<th>Attached Processes (0)</th>
<th>Attached Forms (0)</th>
<th>Attached To (0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project:</td>
<td><em>Current Vendor Training Project</em></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Document:</td>
<td>SUB - 4</td>
<td>Show History</td>
<td>Current Actors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Workflow Step:</td>
<td>PM Review</td>
<td>Show Workflow Diagram</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Subject:</td>
<td>for training material</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Details**

- **Submitter Number:** 002
- **Description:**
- **Spec Section:** 32154
- **Category:** Shop Drawings
- **Is PM review req?** Yes
- **Date Submitted:** 03.12.2019

**Upload Submittal:**

Please attach the Submittal (NOTE: if there are additional attachments, please upload those documents using the “Attach Documents” Tab).

- **PL01 Project Naming Structure.pdf** (version 1)
  Properties | Download (161.9KB) | Redline | Remove

---

**-- Please select an action --**

---

**Workflow Override** | **All Fields View** | **Instructions**
---|---|---
**Check Spelling** | **Print** | **Copy** | **Delegate** | **Save** | **Cancel**
Contractor Notify (Contractor)

1. Contractor review all information on the page including documents under the Attached Documents tab. Review comments under the Comments tab.
2. Click **Take Action** to close the Submittal.

### Submittals (SUB) - 3

- **Project:** Current Vendor Training Project
- **Process Document:** SUB - 3
  - Show History
  - Current Actors
- **Current Workflow Step:** Contractor Notify
  - Show Workflow Diagram
- **Subject:** for training materials
- **Status:** Pending

<table>
<thead>
<tr>
<th>Details</th>
<th>Attached Documents (1)</th>
<th>Attached Processes (0)</th>
<th>Attached Forms (0)</th>
<th>Attached To (0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submittal Number: 001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
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<td></td>
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</tr>
<tr>
<td>PO No:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spec. Section: 123456</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category: Shop Drawings</td>
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<td></td>
</tr>
<tr>
<td>Submittal Document Status: Select one</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is PM review req?: No</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Date Submitted:** 03.12.2019

**Upload Submittal:** Please attach the Submittal [NOTE: If there are additional attachments, please upload those documents using the "Attach Documents" Tab].

- **PI.01 Project Naming Structure.pdf** (version 1)
- Properties | Download (161.9KB) | Redline

[Redline tool]