SUBMITTALS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CONTENTS

1.1 INTRODUCTION TO SUBMITTALS

For information on Submittals, see the links below.

1.2 DEFINITIONS

The following table lists some of the key terminology relating to the Submittals module.

Term	Definition
Deliverable	The item that is required for the issued to company to complete the submittal. Documents can be uploaded to a deliverable to meet the requirements. You can configure at the project level whether to use deliverables to track documents. If you disable deliverables, documents are tracked against the submittal.
Issued to user or company	The company responsible for providing the required deliverables or documents to complete the submittal.
Submittal manager	The person from the managing company responsible for the submittal during its life cycle.
Managing company	The company responsible for creating and managing the submittal throughout the life cycle.

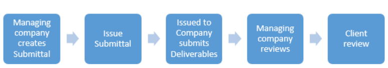
The following table lists terminology related to milestones.

Term	Definition
Kick off date	The date the submittal process begins.
Lead time	The amount of time required between the last milestone date and the late

Term	Definition
	execution date.
Late execution date	The date the submittal can be completed.
Submission due date	The date deliverables or documents are required by the issued to company.
Duration	The number of days required to complete a milestone.
Float	The number of days between the completion of one milestone and the beginning of the next.
Scheduled milestone dates	The original baseline dates as defined by the contract for the submittal to determine if it is behind, on track, or ahead of schedule.
Forecasted milestone dates	The current projected completion dates for the submittal. These dates are compared to the scheduled milestone dates to evaluate the progress of the submittal.

1.3 BUSINESS PROCESS

The business process around managing submittals in Document are described below.



1.3.1 CREATE A SUBMITTAL

The submittal manager takes the following steps to create the submittal and its deliverables, if applicable, on behalf of the managing company:

1. Selects a submittal type and then fills out the submittal details.
2. Reviews the milestone dates. The default milestones, their durations, and float days are populated as defined by the submittal type. After reviewing the submittal manager saves the submittal as a draft.
3. Adds deliverables to the submittal, if applicable, and defines default attributes.

4. Optionally links documents to deliverables or submittals. The linked documents serve as placeholders for the actual documents.

1.3.2 ISSUE A SUBMITTAL

The submittal manager takes the following steps to issue the submittal to the issued-to company or person:

5. From the Submittal page, selects issue. A transmittal is generated and sent to the issued-to company or person.

1.3.3 SUBMIT DELIVERABLES OR DOCUMENTS

The issued-to company takes the following step to submit deliverables or documents to the managing company:

6. Receives the transmittal notification with a link to the submittal.
7. Uploads documents to the Deliverables page, if deliverables are enabled, or the Documents page, if deliverables are disabled..
8. Fills out fields marked required on the Deliverables or Documents page.
9. Selects one or more deliverables or documents and clicks **Submit**. A submittal notification is sent to the submittal manager.

1.3.4 REVIEW DELIVERABLES OR DOCUMENTS IN HOLDING AREA

The managing company takes the following steps to review the deliverables or documents:

10. Receives notification that the deliverables or documents have been submitted.
11. Clicks on the documents icon number to get a list of documents.
12. Reviews each document in the list.
13. Either processes or rejects the documents.

1.3.5 DOCUMENT REVIEW

The managing company takes the following steps to start the client review workflow after all documents have been processed:

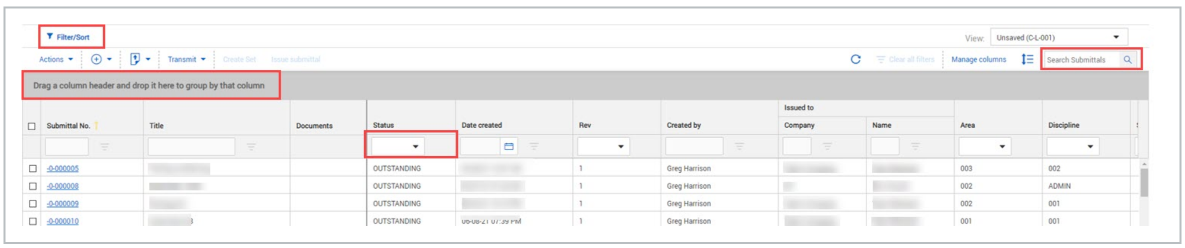
14. Goes to the Deliverables or Documents view and then clicks **Activate review** to start the standard document review functionality.

1.4 VIEWING THE SUBMITTALS REGISTER

The Submittals register contains all submittals related to a project. The register lets you see information including the submittal number, title, number of deliverables, and status at a glance. A yellow exclamation point icon shows when newly submitted documents are available.

The layout of the register varies based on whether the project has deliverable settings enabled or disabled. When deliverables are enabled, the register shows a Deliverables column, which tracks the number of deliverables in the submittal. Documents are uploaded to the deliverables. When deliverables are disabled, the register shows a Documents column, and documents are associated directly to the submittal.

Submittals can be grouped into sets. These can be viewed on the Submittals Sets register. See [Create sets]



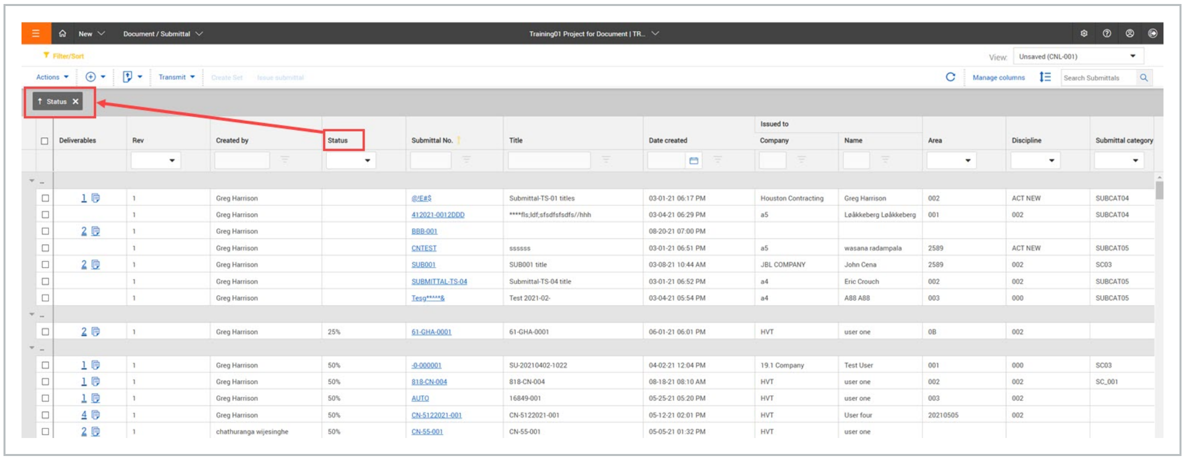
You can do the following to sort and filter the Submittals register:

- Click the column headers to sort by columns or use the column filters.
- Search for submittals using the search box above the register.
- Group the entries in the register

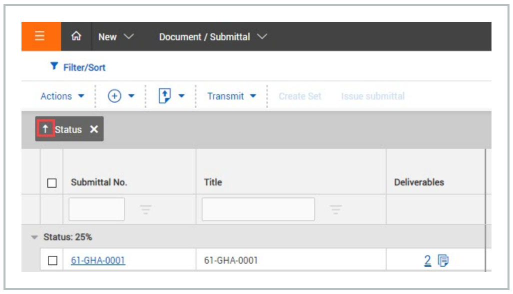
1.4.1 GROUP ITEMS ON SUBMITTALS REGISTER

You can group entries in the Submittals register by available register columns to help you quickly locate submittals.

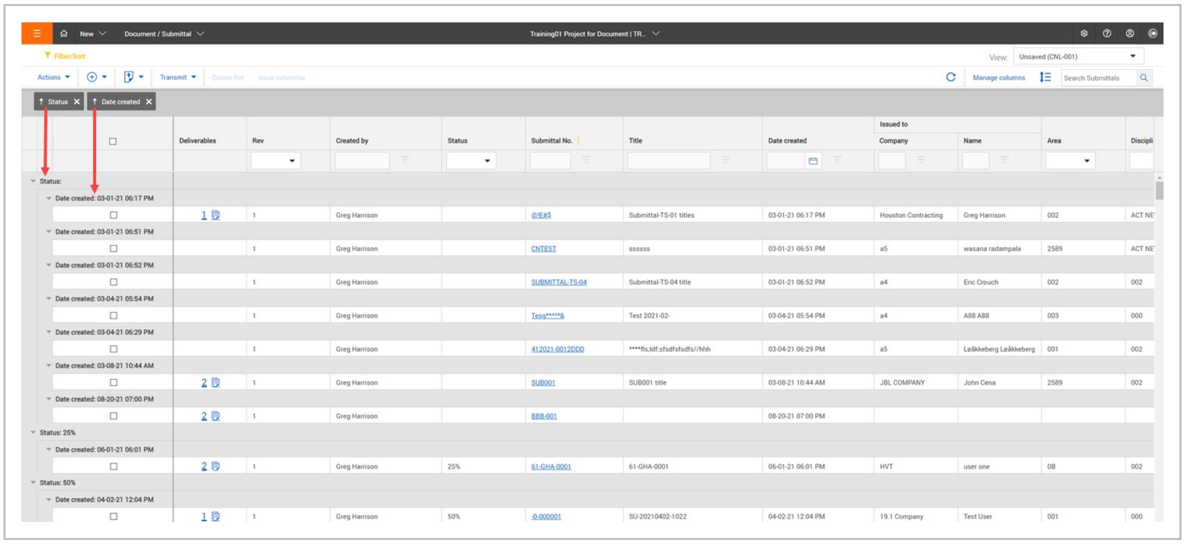
The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Status column to the bar, the submittals are grouped by status. In the image below, the submittals are grouped by status in ascending order. The submittals with no status come first, followed those with 25% complete and then those with 50% complete.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the submittal you are looking for quickly.



To use multiple groups, you can drag multiple column headings to the grouping tool. The submittals are grouped in the order the headings are placed in the tool. For example, if you were to add the Date created column to the scenario above, the submittals would be grouped by status and then creation date within the status.



1.5 CREATING SUBMITTALS AND DELIVERABLES

For information about creating submittals and deliverables, see the links below.

1.6 CREATE SUBMITTALS

The managing company creates submittals using preconfigured submittal types. Follow these steps to create a submittal.

Add a submittal to be able to track deliverables or documents and tie them to milestone dates.

This procedure configures the submittal information. If deliverables are enabled, you can add one or more deliverables to the submittal. See the topic Creating deliverables for information about adding deliverables. If deliverables are disabled, you can add one or more documents directly to the submittal.

1. On the Submittals register, click the **Add** icon, and then select a submittal type. The Details page for the submittal type opens.
2. Enter all required information. Mandatory information for a submittal includes the following;

- Submittal number
- Title
- Revision
- Description
- Issued to company
- Issued to user
- Area
- Discipline
- Submittal manager
- Kick off date

3. Adjust the kick off date, lead time, and late execution date in the Scheduled dates information block as needed. The milestone dates and kick off dates are calculated based on the selected execution date and their defined duration and float days. You can also edit the duration days and float days in the Milestone dates information block. See the topic About milestones for more information about milestone dates.
4. Click **Save as draft**.

You are now able to add deliverables or documents to the submittal. If you want to delete the draft submittal, select it, and then expand the **Actions** menu, and select **Delete**. The Submittal is then deleted from the register. Submittals can be updated individually or in bulk.

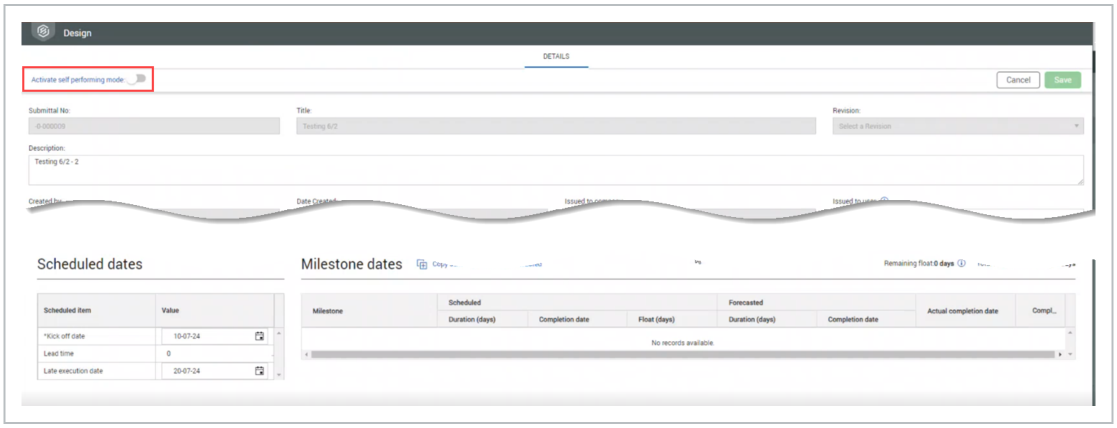
1.6 STEP BY STEP 1 – UPDATE SUBMITTALS IN BULK

When you want to make the same changes to multiple submittals, you can save time by editing them in bulk.

Submittals must be of the same type to be updated in bulk. If you are the submittal manager, you can edit the activate self-perform mode in bulk. Submittals must be in the *Draft* state to edit this field in bulk. If one or more selected submittals are not in the *Draft* state, the Activate self performing mode toggle is disabled.

You can also use the import feature to update submittals in bulk. See Import submittals and deliverables for more information.

1. From the submittals register, select multiple submittals that require the same updates, and then go to Actions > Admin > **Change submittal details**. A details page opens. Fields that cannot be changed are disabled.



2. Enter the details you want to update, including the Activate self performing mode toggle.
3. Click **Save**. The changes are applied to all selected submittals.

1.7 ABOUT MILESTONES

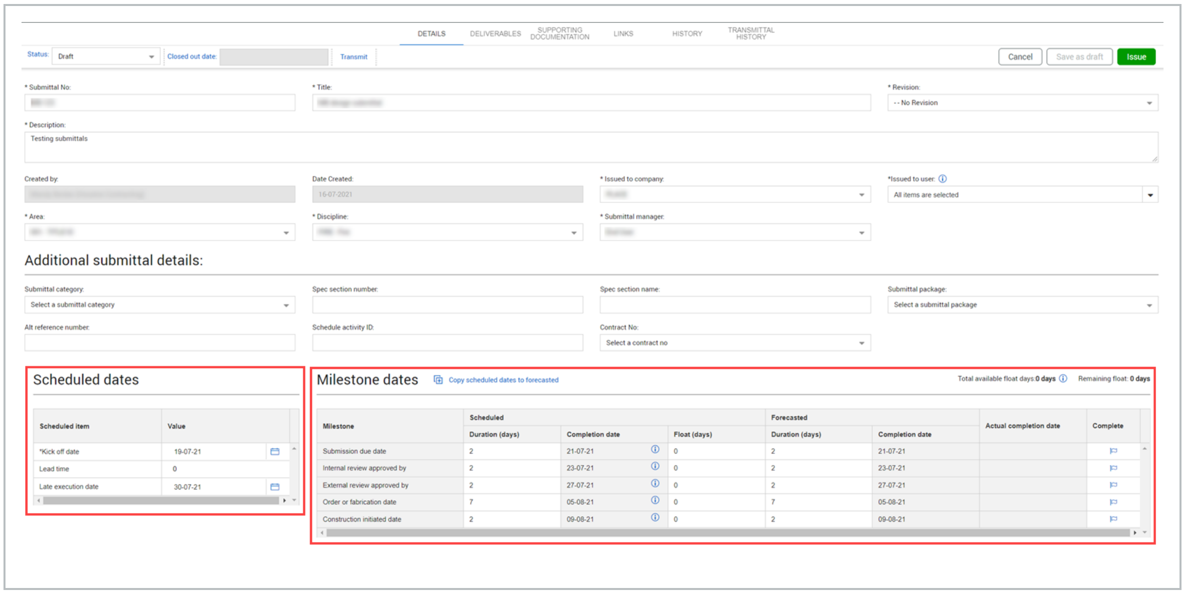
The Submittals Details page shows the scheduled dates and milestones for your submittals, organized into information groups. Milestones are configured for your organization in the Configuration tables (Settings > Admin >Configuration tables > Submittals > **Milestones**).

1.7.1 SCHEDULED DATES INFORMATION GROUP

In the Scheduled dates information group, the kick off date defaults to the current date. The late execution date defaults to the last week day of the current month. You can enter your dates in these fields. In the Lead time field, you can indicate how much time is required between the last milestone date and late execution date.

1.7.2 MILESTONES INFORMATION GROUP

In the Milestones information group, you can view the milestones needed to complete the submittal.



1.7.2.1 SCHEDULED SECTION

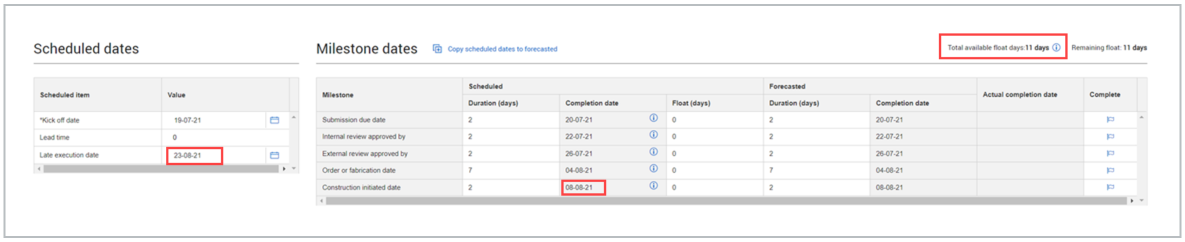
The Scheduled section lets you update each milestone’s duration in days. Each milestone has a completion date that is calculated based on the Kick off date as defined in the submittal type. As you update durations for each milestone, its completion date is calculated automatically, based on the milestone’s duration. The completion dates for the milestones that follow are also updated.

1.7.2.2 FORECASTED SECTION

Each milestone also contains a Forecasted section to help you predict the actual time line of the deliverables or documents. Use the Forecasted Duration (days) field to adjust the Forecasted Completion dates. The Completion date defaults for each milestone from the Kick off date.

The Milestones information group also indicates your total available float and remaining float for the submittal.

Your available float days are the difference between your Late execution date and the Completion date of the last milestone. In the example below, the late execution date is 08/23/2021 and the Completion date of your final milestone (Construction initiated date) is 08/28/2021. This gives you 11 extra days, considered as float days, to accomplish your milestones. If you have lead time configured, the total number of float days is decreased by the number of lead time days.



1.8 CREATE DELIVERABLES

Deliverables define what is required of the issued to company to complete the submittal. Follow these steps to create a deliverable.

Add a deliverable to create a record of all items you require from the issued to company.

Deliverables must be enabled in the project settings. A submittal must already have been created. You must add at least one deliverable before you can issue the submittal. You can create as many deliverables before issuing the submittal.

1. From the submittal Details page, click the **Deliverables** tab.
2. Click the **Add** icon. The New deliverable window opens.
3. Enter all required information. Mandatory information for a deliverable includes the following;
   - Deliverable number
   - Deliverable type
   - Deliverable status
   - Description
4. Enter the scheduled completion date and forecasted completion date in the Deliverable dates section as necessary. These fields let you track the due dates of the deliverable instead of using the overall submittal milestone dates.
5. Click **Save**.
6. Click the **Default attributes** tab. The default attributes can predefine the data for any documents uploaded for the deliverable by the issued to company.
7. Enter information or click the **Required** check box for any field required of the issued to company, and then click **Save changes**.

You can add supporting documentation or links to the submittal or issue the transmittal. When the deliverable is completed, Document automatically updates the actual completion date and Complete flag.

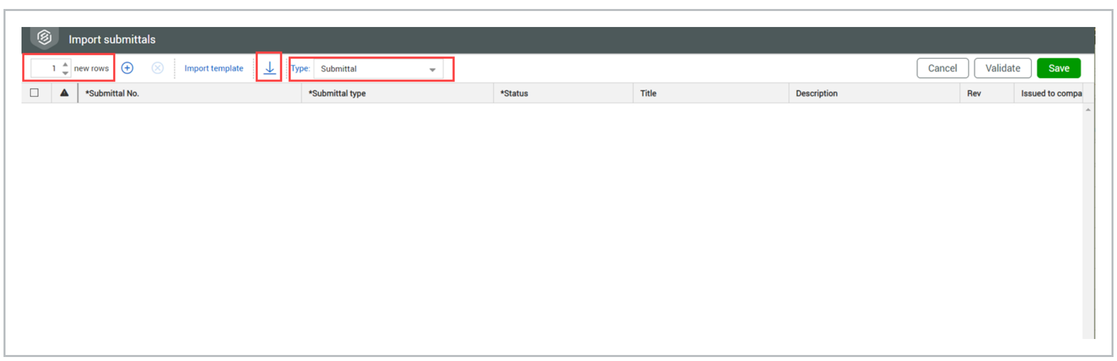
1.9 IMPORT SUBMITTALS AND DELIVERABLES

You can import submittals and deliverables from a Microsoft Excel spreadsheet to add new submittals and deliverables. You can also use the import function to update submittals in bulk.

When you have a large number of submittals or deliverables, you can create list all items on an Excel spreadsheet and import them into the Submittals module. This helps save time entering the same items for each project.

InEight updates the Excel import template as the Submittals module is updated. It is best practice to download the Download template each time. Using an out -of-date template can result in submittal errors. The Import template has a tab for Submittals and a tab for Deliverables. You must import each tab separately, but you can save imports of both types at one time. If your project has disabled the deliverables function, you can use the template to import submittals only.

1. From the Submittals register, click the **Actions** menu, and then select **Import submittals from Excel**. The Import submittals dialog box opens.
2. Click the **Download template** icon to download the Excel Import template.



3. Open the Excel template, and then enter submittals and deliverables on their respective tabs. Make note of the number of rows for the submittals and deliverables. If deliverables are disabled, the template has only the Submittals tab.
4. Save the Excel template.
5. In the Import submittals dialog box enter the number of new rows in the new rows field. If your project uses deliverables, select **Submittal** or **Deliverable** as the type. If your project has disabled deliverables, the dialog box does not have the Type drop-down list.

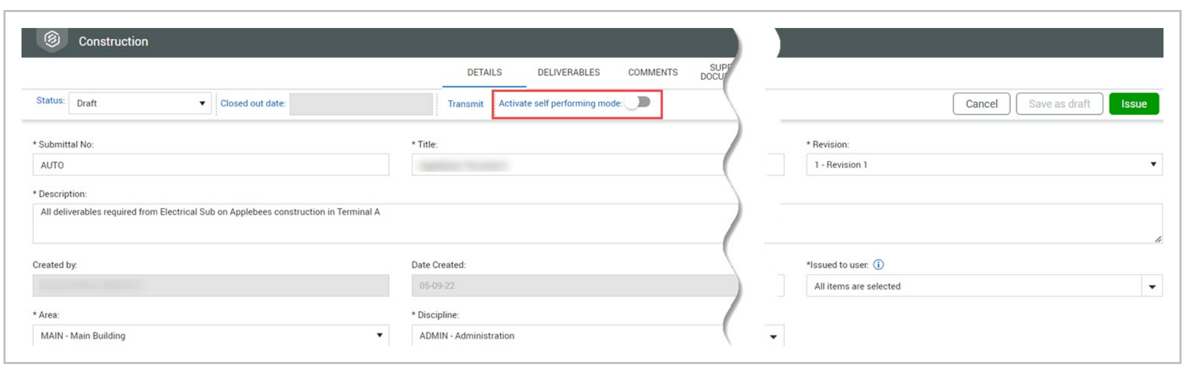
6. Click **Import template**. The Select Excel file dialog box opens.
7. Drag and drop or browse to your saved Excel file, and then click **Upload**. The rows of the template populate the Import submittals register.
8. If deliverables are not disabled and you have items of the other type, change the value of the Type field, and then enter the number of rows for that type. If you have no more items to import, go to Step 10.
9. Click **Import template**.
10. Click **Validate** to validate the imported data, and then correct any errors.
11. Click **Save**

The imported items are added to their respective registers.

1.10 SELF-PERFORMING MODE

You can self-perform submittal tasks on draft submittals for internal teams or on behalf of a subcontractor. Self-performing mode lets the managing company move the submittal out of draft state and close out without having to issue the submittal. When self-performing mode is not used, you cannot perform submittal tasks, such as uploading a document, unless the submittal is issued.

A submittal manager must first activate self-performing mode by switching the **Activate self performing mode** toggle at the top of the Submittal Details page to *On*. A confirmation box asks you to confirm that submittal managers can move the submittal out of *Draft* status without issuing it.



To self-perform submittal tasks, change the status of the submittal to a status other than *Draft*, and then save it.

1.11 LINK DOCUMENTS TO DELIVERABLES

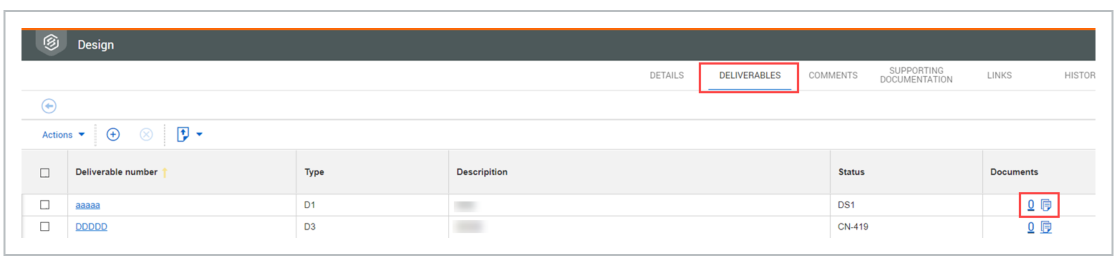
When deliverables are enabled, the managing company can link documents to deliverables before they send the submittal to the issued-to company. The linked documents serve as placeholders for the deliverables. After the issue company receives the submittal, they can then upload the factual deliverable file in the placeholder. See Link documents to submittals for information about linking documents when deliverables are disabled.

1.11.1 LINK DOCUMENTS TO DELIVERABLES PRIOR TO ISSUE

You can link deliverables to documents to create placeholders for the documents requested in the submittal. This can ensure that the issued-to company sends the expected documents.

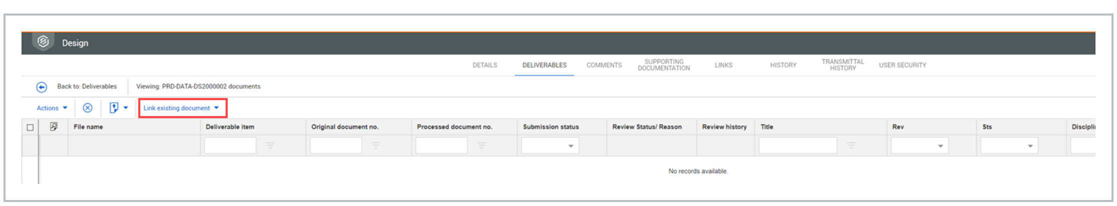
A project setting, Allow submittal recipient to add new documents, lets you restrict the issued-to company from adding new files that do not have a document placeholder. When selected, the Issued to company can add any files to the deliverable. When unselected, the issued-to company can only add files to the documents sent by the managing company. To link documents, deliverables must already be created for the submittal.

1. From the Submittals register, click on a submittal that has deliverables configured to open the submittal. The Submittal Details page opens.
2. Go to the **Deliverables** tab, and then click on the icon in the Documents column for a deliverable.



   The Deliverables tab for the document opens.

3. Click **Link existing document**, and then select **Documents**.



   The Add document dialog box opens.

4. Enter search criteria to find your documents, and then select your documents from the search results.
5. Click **Save**.

You can issue the submittal to the issued-to company. The issued-to company can upload documents to the placeholders.

1.11.2 LINK ADDITIONAL DOCUMENTS AFTER ISSUE

You can link additional documents after the submittal. A dialog box opens and asks if you want to notify the issued-to company of the added document. If you click **No**, the links are sent without notification. If you click **Yes**, the Generate transmittal page opens, and you can format the notification before sending the links.

1.12 LINK DOCUMENTS TO SUBMITTALS

When deliverables are disabled, the managing company links documents directly to submittals. The linked documents serve as placeholders for the documents that are uploaded by the issuing company. After the issue company receives the submittal, they can then upload the factual deliverable file in the placeholder.

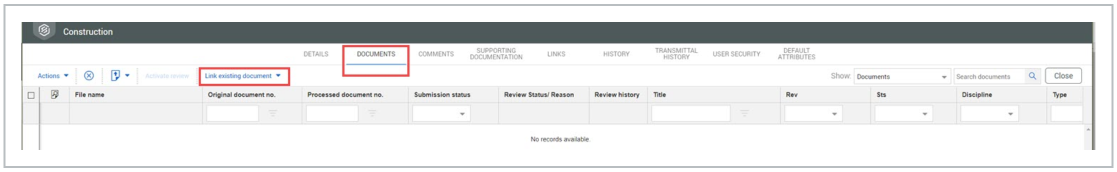
For information about linking documents to deliverables in a submittal, see Link documents to deliverables.

1.12.1 LINK DOCUMENTS TO SUBMITTALS PRIOR TO ISSUE

You can link documents to create placeholders for the documents requested in the submittal. This can ensure that the issued-to company sends the expected documents.

A project setting, Allow submittal recipient to add new documents, lets you restrict the issued-to company from adding new files that do not have a document placeholder. When selected, the issued to company can add any files to the submittal. When unselected, the issued-to company can only add files to the documents sent by the managing company.

1. From the Submittals register, click on a submittal number to open the submittal, and then click on the **Documents** tab.
2. Click **Link existing document**, and then select **Documents**.



The Add document dialog box opens.

3. Enter search criteria to find your documents, and then select your documents from the search results.
4. Click **Save**.

You can issue the submittal to the issued-to company. The issued-to company can upload documents to the placeholders.

1.12.2 LINK ADDITIONAL DOCUMENTS AFTER ISSUE

You can link additional documents after the submittal. A dialog box opens and asks if you want to notify the issued-to company of the added document. If you click **No**, the links are sent without notification. If you click **Yes**, the Generate transmittal page opens, and you can format the notification before sending the links.

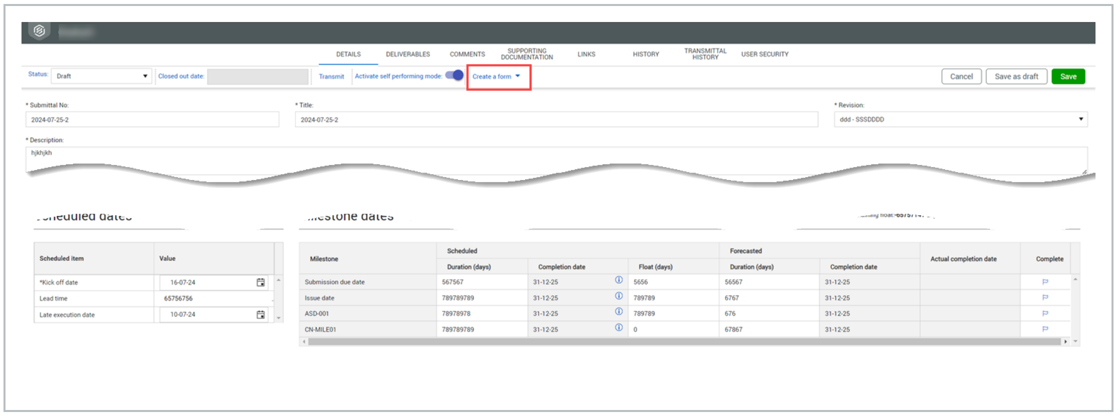
1.13 CREATE A FORM FROM A SUBMITTAL

If you want to link a form to one or more submittals, you can create the form directly from the Submittals register or the submittal Details page. Creating the form from the submittal can save time and reduce errors associated with entering submittal information manually.

CREATE A FORM FROM SUBMITTAL

Summary: Create a form from a submittal, so you do not have to leave the Submittals Details page to create a form. Forms created from the Submittals Details page are automatically linked to the submittal.

1. From the Submittals Details page, click the **Create a form** button, and then select the applicable form type.



The Detail page for the selected form type opens.

2. Enter the form details, and then click **Save** or **Complete action**.
   - If you click **Save**, the form is saved as a draft only, and the For Action and For Info users are not notified of the form.
   - If you click **Complete action**, the form is saved and the For Action and For Info users are notified.

The form is saved in the form register and is automatically linked to the submittal.

CREATE A FORM LINKED TO MULTIPLE SUBMITTALS

Summary: Create a form that is linked to multiple submittals, so you do not have to link the form to the submittals manually.

1. From the Submittals register, select one or more submittals.
2. Expand the **Actions** menu, and then select the applicable form type. The Detail page for the selected form type opens.
3. Enter the form details, and then click **Save** or **Complete action**.
   - If you click **Save**, the form is saved as a draft only, and the For Action and For Info users are not notified of the form.
   - If you click **Complete action**, the form is saved and the For Action and For Info users are notified.

The form is saved in the form register and is automatically linked to the submittal.

1.14 ISSUE SUBMITTALS

After deliverables are created, you can issue the submittal to the issued to company. You can issue a single submittal or issue multiple submittals in bulk.

1.14 STEP BY STEP 1 – ISSUE A SUBMITTAL

Issue a submittal to the issued to company to inform them that a deliverable is due.

1. From the Details page for a submittal, click **Issue**. A Generate transmittal window opens.
2. Optionally, click **Request read receipt** if you want to be notified of when the submittal was read by the recipient.
3. Enter a message to the recipient.
4. Optionally, verify the deliverables or documents and the recipients. If the information is not correct, you must go back to the submittals Details page to fix it.
    - If the project uses deliverables, go to the **Deliverables** tab to verify the deliverables and the **Recipients** tab to verify the recipients.
    - If the project does not use deliverables, go to the **Documents** tab to verify the documents and the **Recipients** tab to verify the recipients.

   Return to the **Details** tab.
5. Click **Send**. A transmittal is generated and sent to the users at the issued to company.

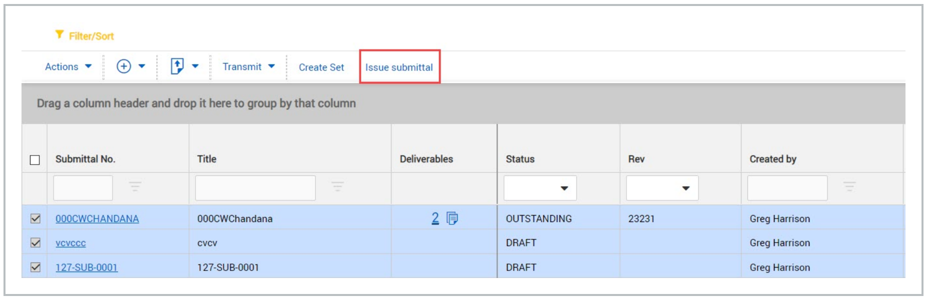
The issued to company can submit deliverables. You can track the transmittal on the transmittal History tab. If you have mistakenly issued the submittal, you can cancel it.

1.14 STEP BY STEP 2 – ISSUE SUBMITTALS IN BULK

You can issue submittals in bulk when you have multiple submittals and you want to issue them in one action instead of individually.

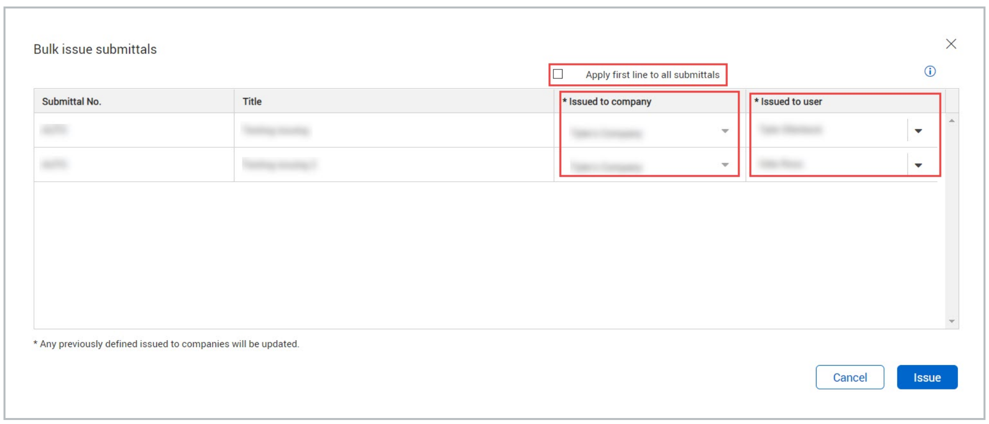
You can also assign or define the issued-to company in bulk.

1. From the Submittals register, select the submittals that you want to issue.
2. Click Issue submittal.



The Bulk issue submittals dialog box opens.

3. Review the information in the dialog box. You can make the following changes if necessary:
    - Change the issued-to company
    - Change the issued-to user
    - Apply the first line to all submittals



4. Click **Issue**. The Generate transmittal dialog box opens.
5. Add a message. If you want a read receipt, click **Request read receipt**.
6. Click **Send**.

1.14 STEP BY STEP 3 – CANCEL A SUBMITTAL

If you have mistakenly issued a submittal, you can cancel it.

When you cancel the submittal, the record is locked, and you cannot edit information or upload deliverables.

1. From the register, select the submittal.
2. Expand the Actions menu, and then select Cancel.
3. At the prompt, specify whether the issued-to company is notified that the submittal has been canceled. Click **Save**.

The canceled submittal is omitted from the register. If you want to see cancel submittal, select the Show canceled submittals check box in the Filters slide-out panel, and then click **Apply**.

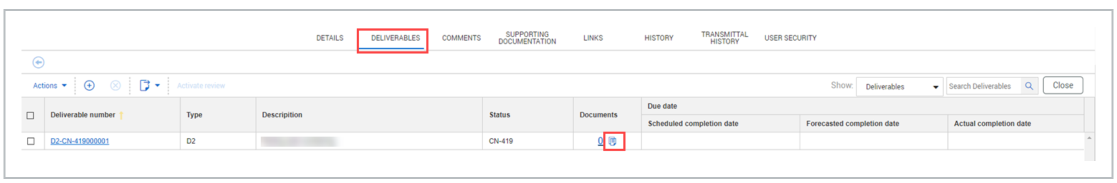
1.15 UPLOAD DOCUMENTS

You can upload documents for the managing company to support submittals for self-performing work or when the subcontractor or vendor sends you documents outside of the Document system.

1.15 STEP BY STEP 1 – UPLOAD DOCUMENTS TO A SUBMITTAL

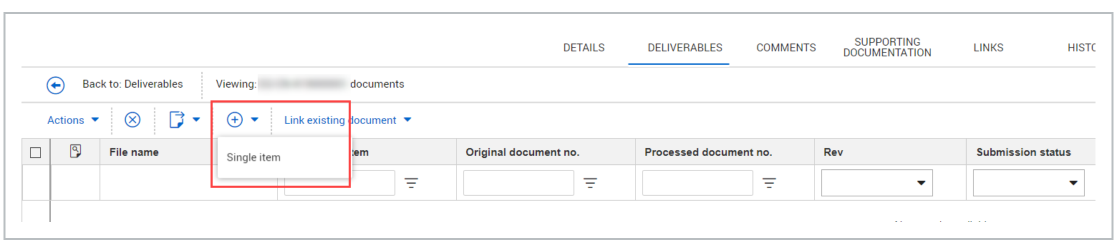
Managing companies can upload documents for submittals.

1. From the submittal's Deliverables tab (or the Documents tab if your project does not use deliverables), click the icon in the Documents column.



   The Documents page opens.

2. Click the **Add** icon, and then select **Single item**.



   The New document Detail page opens.

3. Enter the document information and attach the files.
4. Click **Save**. The documents are uploaded to the deliverable.

1.16 SUBMITTING DELIVERABLES OR DOCUMENTS

After you receive a transmittal notifying you that a submittal has been issued to your company, you can submit deliverables or documents to the managing company.

If the managing company uses deliverables, you upload documents to the deliverable and then submit the deliverable to the managing company. If the managing company has disabled deliverables, you upload documents and then submit them. You can tell whether you are to upload deliverables or documents by looking at the tabs after you open the transmittal notification. If the second tab is Deliverables, you add documents to the deliverables; if the second tab is Documents, you add documents directly to the submittal.

The link in the Transmittal notification gives you read access to the Submittal. See Transmittals for information about managing transmittals. You can submit deliverables as they become available. You do not have to wait until all deliverables are ready.

Follow these steps to submit deliverables or documents to the managing company.

1.16 STEP BY STEP 1 – SUBMIT DELIVERABLES

You submit deliverables to the managing company in response to a submittals transmission. The transmittal notification describes the documents to submit and includes a link to the submittal. Follow these steps when you see a Deliverables tab after you open the link in the transmittal notification.

1. Click the **Deliverables** tab to see the list of required deliverables. If the Documents column shows a number, a placeholder document has been added by the managing company.
2. If the deliverable has a placeholder document, click the icon in the Documents column. If the document does not have a placeholder, continue with step 4.
3. Add files

- If the deliverable has a placeholder, click the **Add** icon in the Update file column.
- If the deliverable does not have a placeholder, click the **Add files** icon from the deliverable entry to upload documents for the deliverable, or click Link existing document to select from documents already uploaded to Document.

4. Add one or more files from your Microsoft Windows Explorer.
5. Update any fields as required for the deliverable entry, and then click **Save**.
6. Click **Back to: Deliverables** to return to the Deliverables view. The Pending documents column shows the number of documents that have been uploaded but not submitted.
7. Select the deliverable. The **Submit document** button is updated with the number of documents that have been uploaded but not submitted.
8. To submit documents, choose one of the following:
   - Click **Submit document** if you plan to submit more deliverables later.
   - Click **Submit documents and complete** if you have all of the deliverables.
9. Enter a message to the recipient, and then click **Send**. A transmittal is created for the managing company. The Submission status and ReviewStatus/Reason columns are updated to Submitted. The documents are uploaded based on the project upload rules. If you selected the option to complete, the submission is complete, and you can no longer upload new documents.

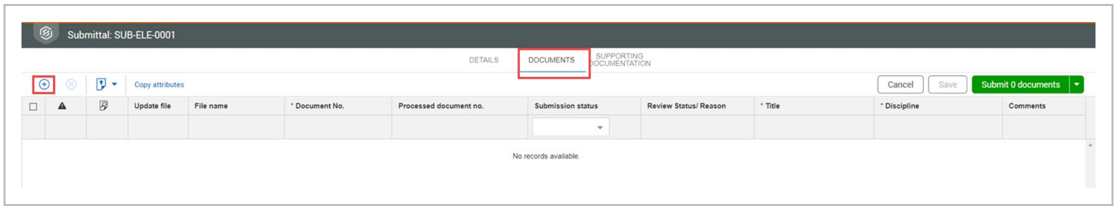
The managing company can review, reject, or start the formal review workflow for the document.

1.16 STEP BY STEP 2 – SUBMIT DOCUMENTS

You submit documents to the managing company in response to a submittals transmission. The transmittal notification describes the documents to submit and includes a link to the submittal. Follow these steps when you see a Documents tab after you open the link in the transmittal notification.

If you have multiple documents for a submittal, you can submit all documents at once, or you can submit them as they become available. If you submit them individually, you must complete the submittal.

1. Click the **Documents** tab.
2. Click the **Add** icon. The Documents directory on your computer opens.



3. Select one or more documents, and then click **Open**. The documents are added to the Documents page.
4. Add a title and discipline for each document, and then click **Save**. The **Submit document** button is updated with the number of documents that have been uploaded but not submitted.
5. Click the **Submit documents** button. The General transmittal page opens.
6. Enter a message to the recipient, and then click **Send**. A transmittal is created for the managing company. The Submission status and ReviewStatus/Reason columns are updated to *Submitted*. The documents are uploaded based on the project upload rules.

The managing company can review, reject, or start the formal review workflow for the documents.

1.17 COMPLETE RESUBMITTALS

If the managing company rejects a document from the holding area or following a document review, they can request a resubmittal. If the managing company wants you to resubmit a document, you will receive a transmittal notification. Complete the resubmittal by following these steps:

If the managing company rejects your document, they request a resubmittal. You can then fix problems or answer questions and resubmit the document.

If the document is rejected from the holding area, the document status is Rejected.

1. Open the transmittal notification, and then click the link to the submittal. The Submittal Details page opens.
2. Click the **Deliverables** tab to see the list of deliverables.

NOTE	Deliverables that have rejected documents are marked with a red warning triangle.

3. Click the **Documents** icon to see the documents that require resubmittal.

> **NOTE** Rejected documents are marked with a red warning triangle, and the Submission status and Review Status/Reason columns are in red text.

4. Click the **Update file** icon next to the rejected document.
5. Open the document, and update it as requested. Save the document.
6. From the Deliverables list, click the **Add files** icon for the deliverable entry to upload documents for the deliverable.
7. Add one or more files from Microsoft Windows Explorer, and then click **Save**. The revision field is automatically updated to the next revision, but you can edit it if required.
8. Click **Back to: Deliverables** to return to the Deliverables view. The Pending documents column shows the number of documents that have been uploaded but not submitted.
9. Select the deliverable. The **Submit document** button is updated with the number of documents that have been uploaded but not submitted.
10. To submit documents, choose one of the following:
    - Click **Submit document** if you plan to submit more deliverables later
    - Click **Submit documents and complete** if you have all of the deliverables
11. Enter a message to the recipient, and then click **Send**. A transmittal is created for the managing company. The Submission status and ReviewStatus/Reason columns are updated to Submitted. The documents are uploaded based on the project upload rules. If you selected the option to complete, the submission is complete, and you can no longer upload new documents.

The managing company can review, reject, or start the formal review workflow for the document.

1.18 REVIEW DELIVERABLES

After you receive documents from the issued to company, with or without deliverables, you can view them to verify that they are complete. You receive a notification that the deliverables or documents have been submitted. Newly submitted documents show in the Submittals register and deliverables tab with a yellow exclamation point icon.

Follow these steps to review deliverables. You can also go to the Review or Release register to review or release documents assigned to you in your queues.

1.18 STEP BY STEP 1 – VIEW A DELIVERABLE

View a deliverable to see if the issued to company has sent the requested information.

Documents are uploaded based on the project upload rules.

1. Open the transmittal notification, and then click the link to the submittal. The Submittal Details page opens.
2. Go to the **Deliverables** tab, and then click the **Documents** icon to see the documents.
3. View the documents to verify the applicable documents have been submitted.

After you have looked over the documents, you can process or reject them from the holding area or initiate a document workflow from the Review or Release register.

1.18 STEP BY STEP 2 – VIEW DOCUMENTS

View documents when they are delivered directly against the submittal.

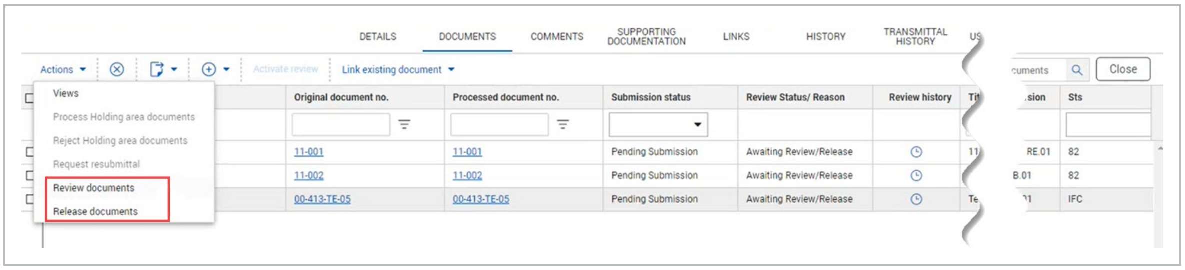
These steps describe how to access documents for review when they are delivered against a submittal rather than in a deliverable. If your project uses deliverables, see the View a deliverable step-by-step.

1. Open the transmittal notification, and then click the link to the submittal. The Submittal Details page opens.
2. Go to the Documents tab, and then click the **View** icon next to a file name to view it.
3. View the document to verify it.

After you have looked over the documents, you can process or reject them from the holding area or initiate a document workflow from the Review or Release register. After you have reviewed the document, you can click the yellow exclamation point icon in the Submittals register or Deliverables tab to remove the icon.

When a document on the submittal Documents or Deliverables page (depending on whether deliverables are disabled for the project) has a review status of *Awaiting Review/Release*, you can go to the Review or Release register without exiting Submittals.

To go to the Review or Release register, expand the **Actions** menu, and then select **Review documents** or **Release documents**.



The Review or Release register opens with a filtered view that shows the documents in your review or release queue, so you do not have to search for them.

1.19 PROCESS DOCUMENTS

If documents are in the Holding Area, they are required to undergo a quality check prior to being added to the Document register.

1.19 STEP BY STEP 1 – PROCESS DOCUMENTS FROM DELIVERABLES

Processing documents lets you prepare your deliverables. After documents are processed, they are added to the Documents register.

The quality checks and validations concern the metadata and links. Use your reviews to check for errors in the documents themselves.

1. From the Deliverables page, select one or more deliverables to process.
    - To process all documents in a deliverable, select a deliverable using the check box.
    - To process selected documents in a deliverable, click the **Documents** icon for a deliverable, and then select the documents from the list.
2. Select **Process documents** from the Actions menu. Update the metadata for the documents as required.
3. Click **Validate** to ensure there are no errors in the metadata.
4. Click **Process** to finalize the processing of the documents and adding them to the Documents register. The Document Received Date dialog box opens.
5. If you want to update the received date, enter a date, and then click **Update**. If you do not want to update the date, click **Do not update**. The Process documents dialog box opens indicating the

documents have been saved.

6. Indicate whether you want to create a transmittal with the saved documents. See Transmittals for information about completing the transmittal.

You can view the documents from the Documents register or from the Deliverables page.

1.19 STEP BY STEP 2 – PROCESS DOCUMENTS WITHOUT DELIVERABLES

Process documents that were delivered against a submittal without a deliverable. Processing documents adds them to the Documents register.

Use these steps process documents that were delivered against a submittal.

1. From the Documents page of the submittal, select one or more documents to process.
2. Go to the Actions menu, and then click **Process documents**.

1.20 REQUEST RESUBMITTALS

If the documents have been rejected from the holding area or following a document review, you can request a resubmittal. Follow these steps to request a resubmittal from the issuing company.

Request a resubmittal of deliverables when documents have been rejected. You can select an entire deliverable or specific documents to send to the issuing company for resubmittal.

You can identify rejected documents by their statuses. If a document was rejected from the holding area, the submission status is Rejected. If the document is rejected from a document review, the status is Review complete - to be returned.

1. From the Documents page, select Request resubmittal from the Actions menu. The Request resubmittal dialog box opens.
2. Select one or more documents to send back to the issued to company, and then click **Request resubmittal**.

The issued to company receives the request and follows the procedures to resubmit the documents.

1.21 CLOSE OUT SUBMITTALS

When all milestone dates have been marked as completed, you can close out the submittal. After the submittal is closed, it can no longer be edited.

To close out a submittal, go to the Details page, and then change the status to *Closed-out*. You can then send a transmittal that includes all the associated submittal documents.

1.22 INITIATE DOCUMENT REVIEW

When all documents have been processed and are ready for review, you can initiate a document review using the standard document review functionality.

- If the project uses deliverables, click **Activate review** from the Deliverables view to start the document workflow.
- If the project does not use deliverables, click **Activate review** from the Documents view to start the document workflow.

1.23 TRANSMIT A SUBMITTAL

You can generate a transmittal from a submittal or a submittal set, so you can issue the submittal using links.

1.23 STEP BY STEP 1 – CREATE A TRANSMITTAL FROM A SUBMITTAL

You can create and send a transmittal from the Submittals register.

1. From the Submittals register, select a submittal.
2. Click **Transmit**, and then select **Create transmittal**. The Transmittal Details page opens.
3. Enter the details of the transmittal, and then click **Send transmittal**.

1.23 STEP BY STEP 2 – CREATE A TRANSMITTAL FROM A TRANSMITTAL SET

You can create and send a transmittal from the Submittals Sets register.

1. From the Submittals Sets register, select a set.
2. Click **Transmit Set**, and then select Individual documents. The Transmittal Details page opens.
3. Enter the details of the transmittal, and then click **Send transmittal**.

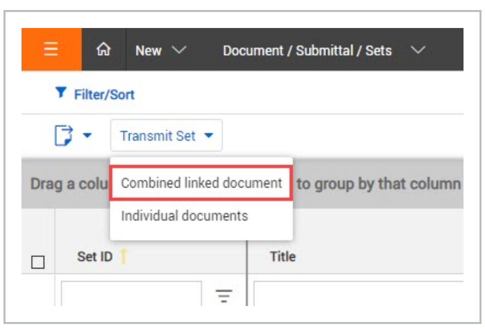
When a combined link document already exists for the set, you can transmit the set as a combined link document.

1.23 STEP BY STEP 3 – TRANSMIT A SET AS A COMBINED LINKED DOCUMENT

Transmit a set as a combined linked document when you have already created a linked document.

A combined linked document must already exist. If a combined linked document does not exist for the set, Document prompts you to create one. See Export a set for information about creating a combined linked document.

1. From the Submittals Sets register, expand the **Transmit Set** drop-down menu, and then select **Combined linked document**.



   The Transmit Details page opens with the linked document already selected.

2. Fill out the details for the transmittal. When a due date is assigned to the submittal set, Document uses that date to populate the Respond by date in the transmittal details.
3. Click **Send** to send the transmittal.

See Transmittals for more information about using and managing transmittals.

1.24 CREATE SETS

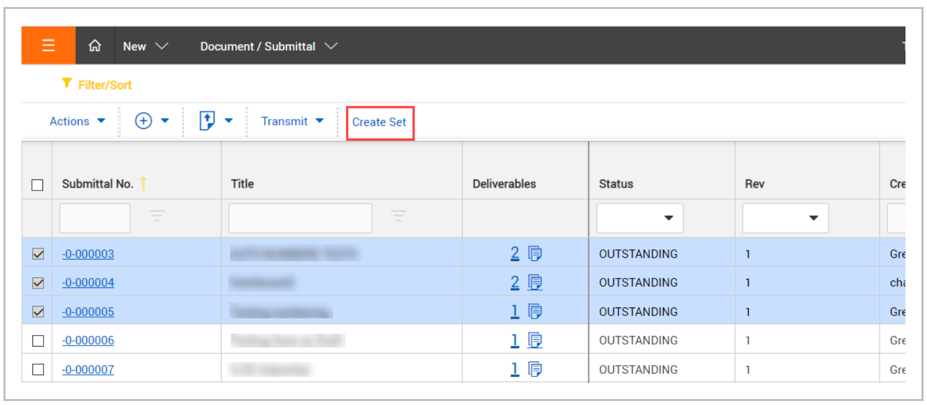
You can group submittals into sets and view them in a separate register. Creating sets lets you view and organize a collection of submittals to export out of the system.

1.24 STEP BY STEP 1 – CREATE SETS

You can create a set when you want to see a group of submittals together instead of having to search for each one individually.

You must have the proper permissions to create sets.

1. From the Submittals register, select one or more submittals, and then click **Create Set**.



   The Submittal Set details page opens.

2. Enter the set detail information, and then click **Save**.

You can view the set in the Set register (Submittals > **Sets**). You can add documents that support the Set on the Supporting Documentation tab. You can also modify the set to add or delete submittals.

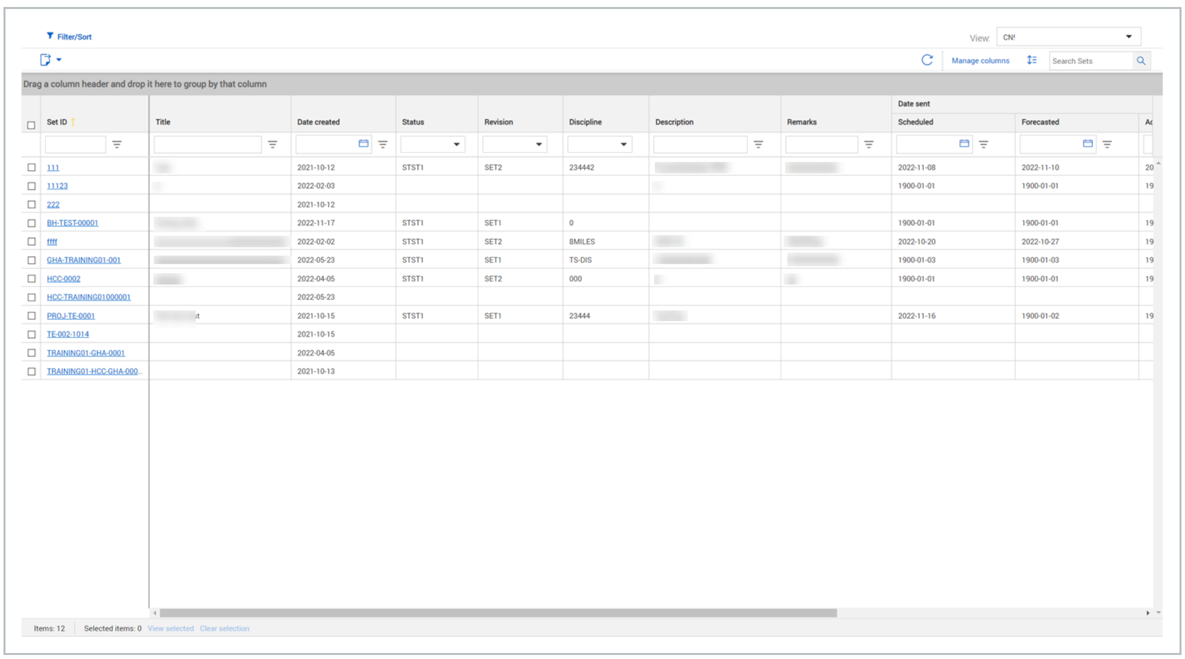
1.24 STEP BY STEP 2 – MODIFY THE LIST OF SUBMITTALS IN A SET

You can add submittals to a set or delete submittals from a set as needed.

1. From the Submittals Sets register, click a Set ID to open the set Details page, and then go to the Submittals tab.
2. Use the **Add** or **Delete** icons to add or delete submittals.
    - To add a submittal to the set, click the **Add** icon, and then use the search criteria to find submittals. When you get the search results, you can select from the list, and then click **Save**.
    - To delete a submittal, select the submittal in the register, and then click the **Delete** icon.

1.25 SETS REGISTER

The Sets register in the Submittals module lists all sets in the submittals module. The register uses the same search, filter, and group functions as the Submittals register.



1.26 EXPORT A SET

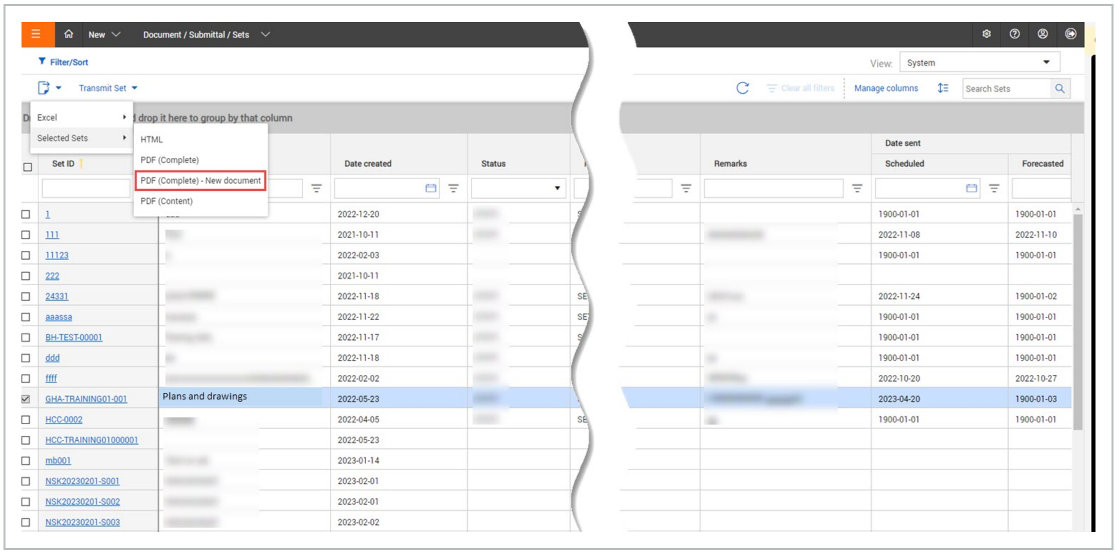
You can export a submittal set and the associated documents as HTML or PDFs. Exporting a set lets you create a single HTML or PDF for the set instead of exporting each submittal in the set. See Export submittals for more information about exporting submittals.

When you export a set, you also have the option to create a set as a new document. This option creates a new PDF and exports it in a single action, so you do not have to create the PDF and then upload it as a document.

1.26 STEP BY STEP 1 – CREATE A SET AS A NEW COMBINED LINKED DOCUMENT

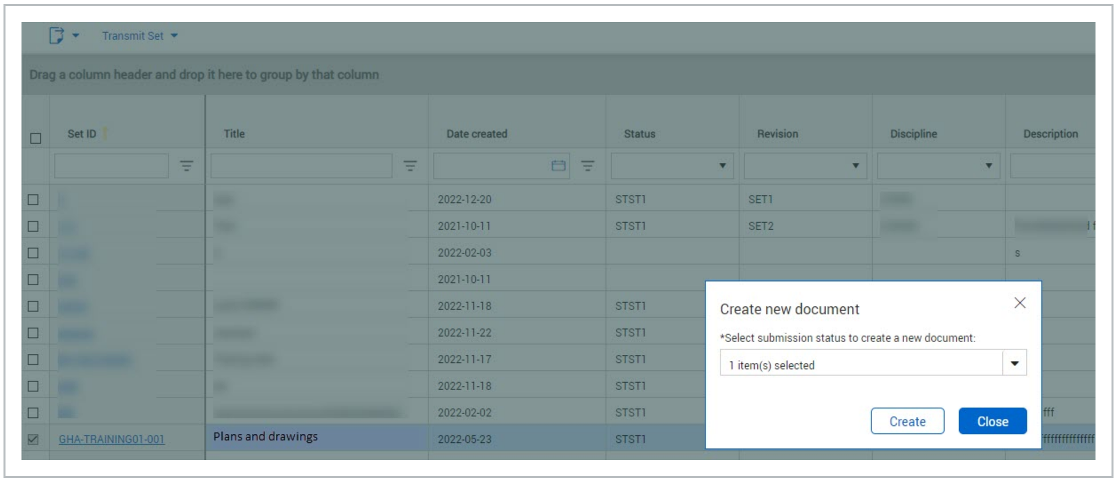
Use one action to create a PDF of a submittal set and upload it as a document.

1. From the Submittals Sets register, select a submittal set.
2. Expand the **Export** drop-down menu, and then select Selected Sets > **PDF (Complete) - New document**.



The Create new document dialog box opens.

3. Use the drop-down list to select one or more statuses of the documents you want to include in the export. If all documents are in the same status, Select all is automatically selected.

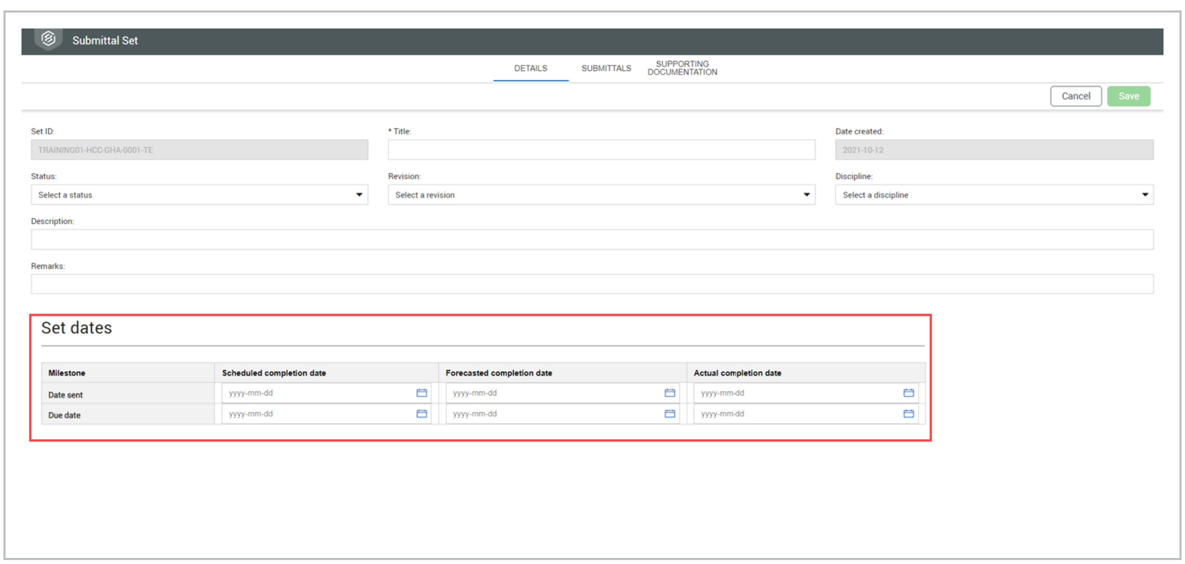


4. Click **Create**. The New document Details page opens. The set ID populates the Document No. field, and the title of the set populates the Title field.
5. Enter the remaining detail information, and then click **Save** to save the document. After the document is saved, it is automatically linked to the set and is shown on the Links tab for the set.

What's next: You can transmit the set as a combined linked document. See 1.23 Transmit a submittal on page 31 for information about transmitting the set as a combined linked document.

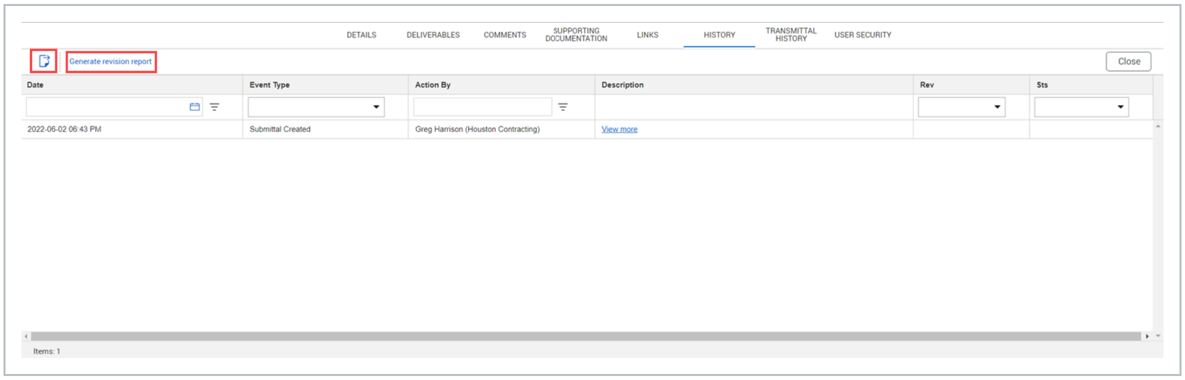
1.27 SET DETAILS

When you click on a set ID, a Details page opens. You can add information about the set, including milestone dates. You can use these fields to manually track the milestones.



1.28 SUBMITTAL HISTORY

Document maintains the history for each submittal on the Submittals History tab. The History tab shows the date, event type, Description, revision, status, and the user who created the action.

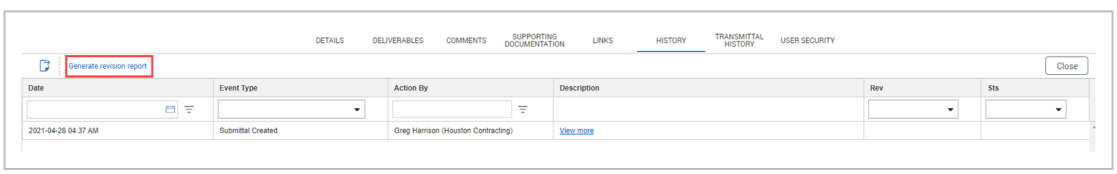


You can export the submittal history by clicking the **Export** icon. You can also generate a unique revision history report that provides visibility into milestone dates and other details per revision of the submittal.

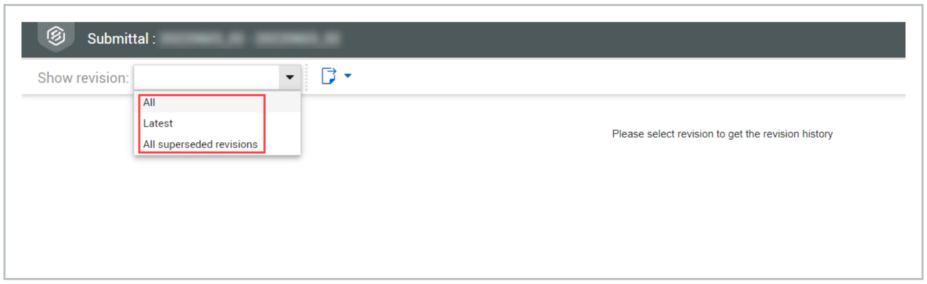
1.28 STEP BY STEP 1 – GENERATE REVISION HISTORY

Generate a revision history report when you want to see the changes that have happened across multiple revisions of the submittal.

1. From the History tab of a submittal, Click **Generate revision report**. A selection window opens.



2. Select the revision type to show in the report. The revision types are as follows:
    - All – All revisions of the submittal
    - Latest – Only the latest revision of the submittal
    - All superseded revisions – All the previous (that is, superseded) revisions of the submittal



3. Click **Search**. The revision history report is generated.

Click the **Export** icon to export the report as a Microsoft Word, Microsoft Excel, or PDF file.

1.29 SUBMITTAL REPORTS

Document provides Submittals reports to allow reporting across submittal activities.

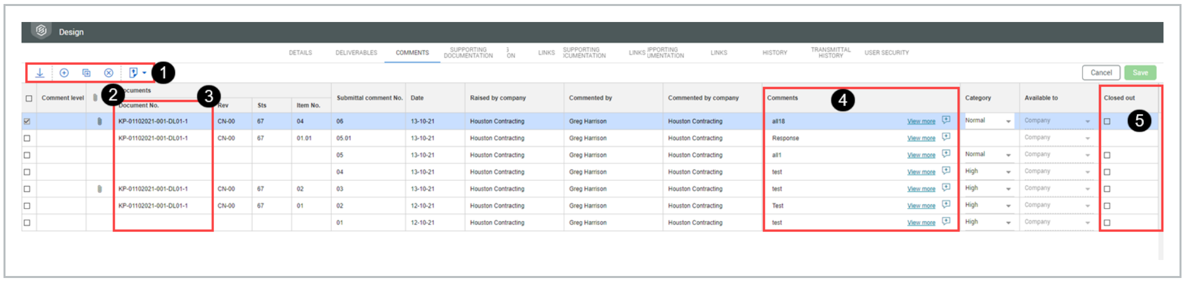
1.29.1 TO RUN A REPORT ON SUBMITTALS:

1. Select the Reports section of Document.
2. Click **Submittals** to expand the Submittals group of reports.
3. Select a report, and then enter filter criteria, such as Deliverable number, Status, or Submittal Deliverable Status.
4. Specify a field name for sorting the report, and then select **Ascending order** or **Descending order**.
5. Click **Search**.

1.30 MANAGE COMMENTS

The Comments tab lets you manage comments for both documents and submittals. You can also use the tab to add, delete, download, or export comments.

The comments tab is a consolidated list of all comments related to the submittal documents. The newest comment is at the top of the list.



Number	Name	Description
1	Toolbar	The following tools are available: Download comments Add a comment at the submittal level Duplicate a comment Delete a comment Export a comment to a Microsoft Excel file
2	Attachments	A paperclip icon indicates that there is an attachment to the comment. Click the icon to download the attachments.
3	Document No.	The number of the document for the comment. If there is no document number the comment was made at the submittal level.
4	Comments	The comment text. If the comment display is truncated, click the **View more** link to see the full comment.
5	Closed out	Lets you close out the comment.

1.31 EXPORT SUBMITTALS

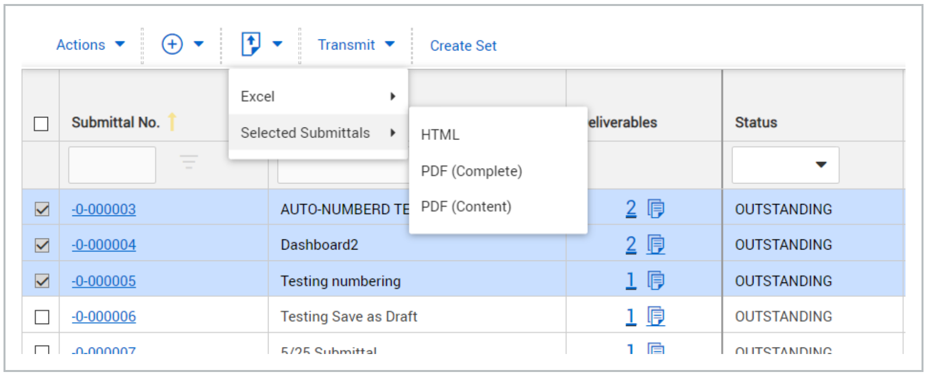
You can export a submittal and the associated documents HTML or PDFs. The download creates a formal coversheet attached to the documents that you can distribute, upload to an external client system, or store in an archive.

Export submittals to your Downloads folder.

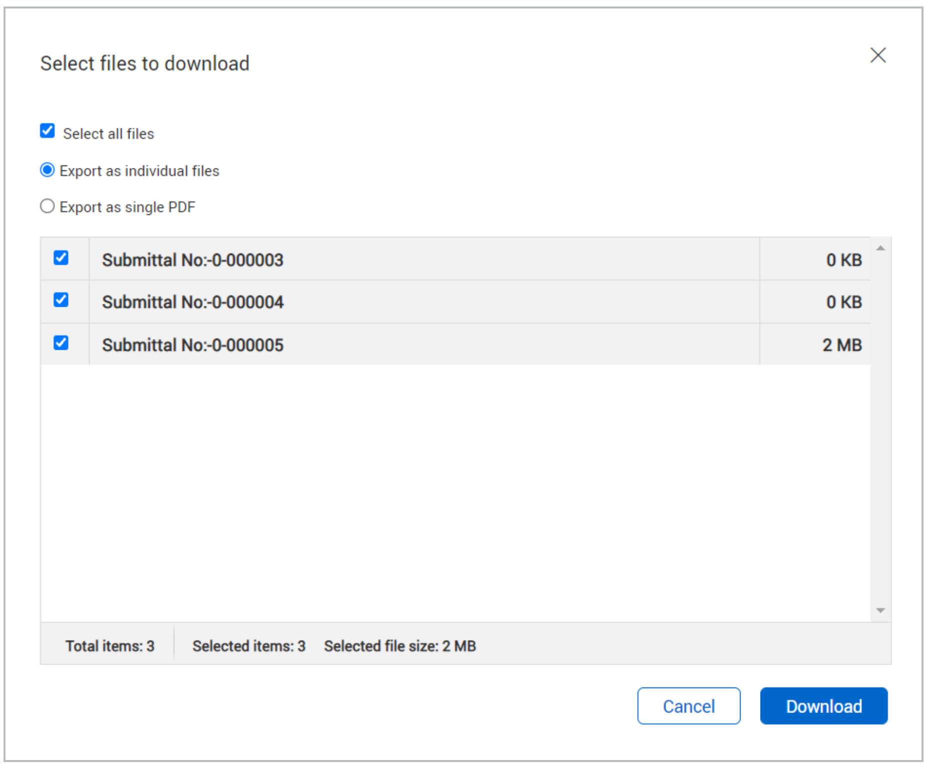
You can export submittals from the Submittals register or the Set register.

1. From the Submittals register or Sets register, select the submittals you want to export.
2. Click the **Export** icon, and then select **Selected Submittals**.

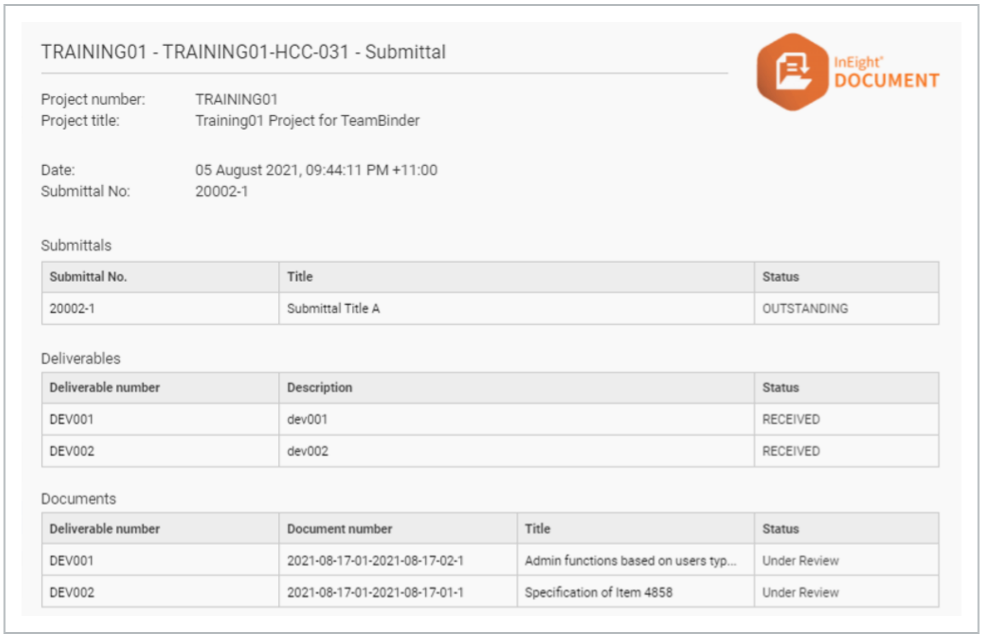
3. In the **Selected Forms** menu, select either **HTML** or **PDF**. The PDF (Complete) option includes associated documents and a cover sheet. The PDF (Content) option only includes a cover sheet.



4. If you selected PDF (Complete), the Select files to download dialog box opens. Indicate the files to download and whether to export as individual files or a single PDF, and then click **Download**.



The file downloads to your Downloads folder. If you exported as a PDF, Document adds a coversheet that includes information about the submittals, deliverables (if applicable), and documents.



TRAINING01 - TRAINING01-HCC-031 - Submittal

InEight DOCUMENT

Project number: TRAINING01
Project title: Training01 Project for TeamBinder

Date: 05 August 2021, 09:44:11 PM +11:00
Submittal No: 20002-1

Submittals

Submittal No.	Title	Status
20002-1	Submittal Title A	OUTSTANDING

Deliverables

Deliverable number	Description	Status
DEV001	dev001	RECEIVED
DEV002	dev002	RECEIVED

Documents

Deliverable number	Document number	Title	Status
DEV001	2021-08-17-01-2021-08-17-02-1	Admin functions based on users typ...	Under Review
DEV002	2021-08-17-01-2021-08-17-01-1	Specification of Item 4858	Under Review

1.32 SUBMITTALS ADMINISTRATION

1.33 MANAGE SUBMITTAL TYPES

The Actions menu on the Submittal register page lets you manage the status types, milestone dates, and milestone notifications for your project.

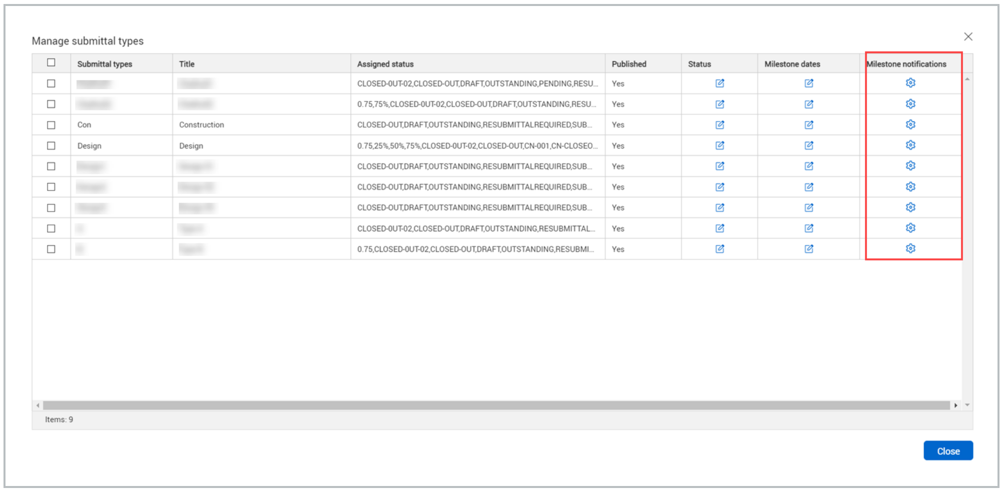
1.33.1 MANAGE MILESTONE NOTIFICATIONS

You can use the Milestone notifications portion of the submittal type to specify the interval, in days, for milestone reminders, upcoming due dates and overdue submittals.Notifications are generated to alert the submittal manager of upcoming or overdue milestone dates. If the overdue milestone date is the submission due date, the issued-to company also receives the notification.

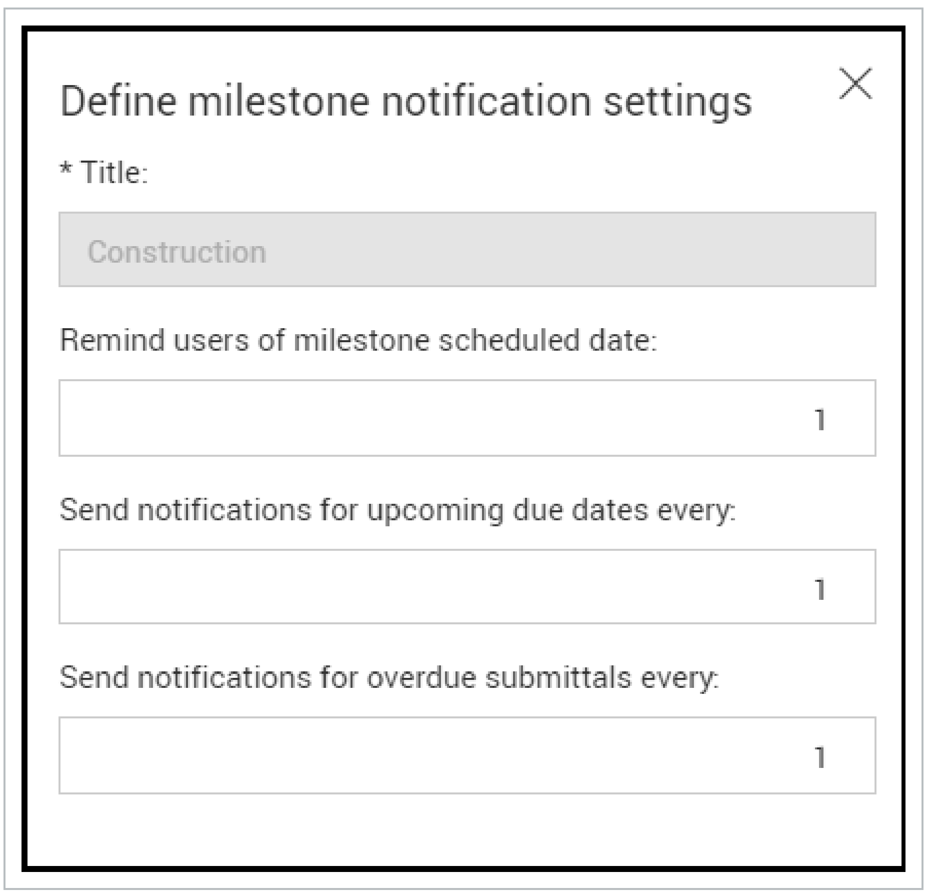
You can specify the interval in days for sending out reminders and notifications related to milestone dates.

The milestone notification settings are for the entire project. The milestone notifications are set individually for each submittal type.

1. From the Submittals register, click **Actions**, and then select Admin > **Manage submittal types**. The Manage submittal types dialog box opens.



2. Click the **Settings** icon in the Milestones notifications column for a submittal type. The Define milestone notification settings dialog box opens.



3. Enter the number of days for each of the following:
   - Remind users of milestone scheduled date
   - Send notifications for upcoming due dates every
   - Send notifications for overdue submittals every
4. Click **Save**.
5. From the Manage submittal types dialog box, click **Close**.

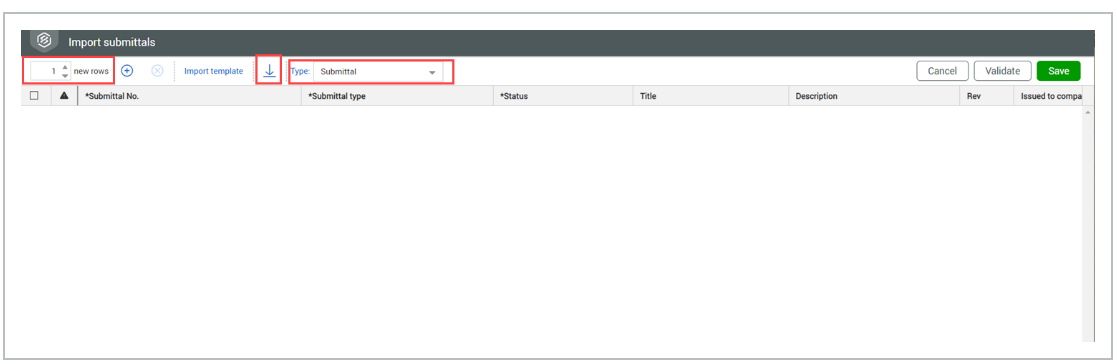
1.34 IMPORT SUBMITTALS AND DELIVERABLES

You can import submittals and deliverables from a Microsoft Excel spreadsheet to add new submittals and deliverables. You can also use the import function to update submittals in bulk.

When you have a large number of submittals or deliverables, you can create list all items on an Excel spreadsheet and import them into the Submittals module. This helps save time entering the same items for each project.

InEight updates the Excel import template as the Submittals module is updated. It is best practice to download the Download template each time. Using an out -of-date template can result in submittal errors. The Import template has a tab for Submittals and a tab for Deliverables. You must import each tab separately, but you can save imports of both types at one time. If your project has disabled the deliverables function, you can use the template to import submittals only.

1. From the Submittals register, click the **Actions** menu, and then select **Import submittals from Excel**. The Import submittals dialog box opens.
2. Click the **Download template** icon to download the Excel Import template.

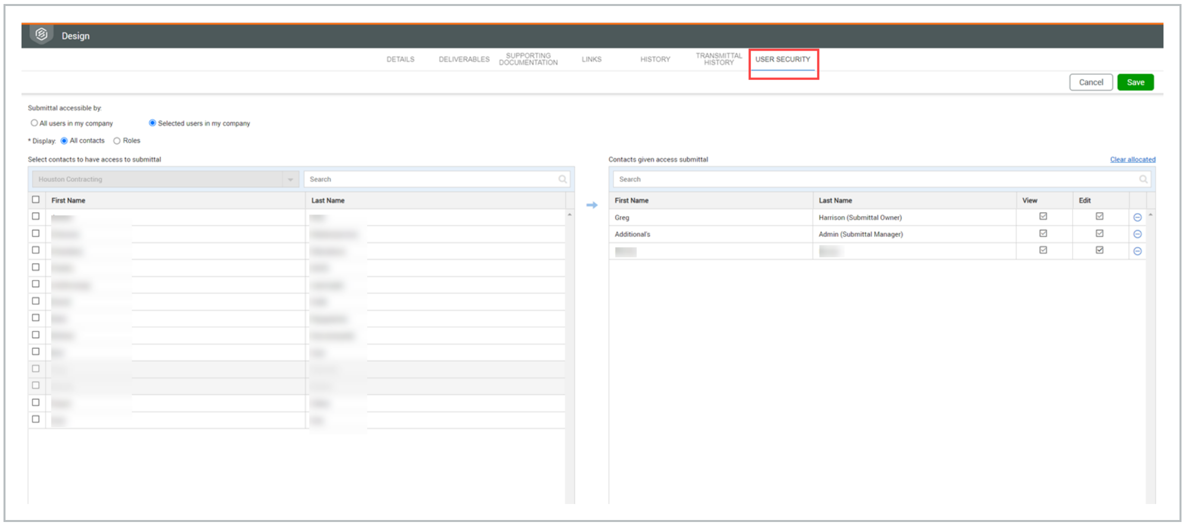


3. Open the Excel template, and then enter submittals and deliverables on their respective tabs. Make note of the number of rows for the submittals and deliverables. If deliverables are disabled, the template has only the Submittals tab.
4. Save the Excel template.
5. In the Import submittals dialog box enter the number of new rows in the new rows field. If your project uses deliverables, select **Submittal** or **Deliverable** as the type. If your project has disabled deliverables, the dialog box does not have the Type drop-down list.
6. Click **Import template**. The Select Excel file dialog box opens.
7. Drag and drop or browse to your saved Excel file, and then click **Upload**. The rows of the template populate the Import submittals register.
8. If deliverables are not disabled and you have items of the other type, change the value of the Type field, and then enter the number of rows for that type. If you have no more items to import, go to Step 10.
9. Click **Import template**.
10. Click **Validate** to validate the imported data, and then correct any errors.
11. Click **Save**

The imported items are added to their respective registers.

1.35 USER SECURITY TAB

User security settings let you specify whether each submittal is accessible to all users in the managing company or only to selected users. Submittal accessibility settings are on the User Security tab of the Submittals module.



To give access to all users in your company, select the **All users in my company** radio button, and then click **Save**. To give access to selected users, follow these steps:

1. Select the **Selected users in my company** radio button.
2. From the Select contacts to have access to submittal list, select a company, if applicable.
3. Check the boxes next to the names of the people you want to give access.
4. Click the arrow to move the names to the Contacts given access submittal section.
5. Click **Save**.