



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 22**

# **Submittal Packages and Submittals**

**ORACLE** Primavera

## TABLE OF CONTENTS

Section Title	Page Number
<b>I. Submittal Packages and Submittals</b>	4
A. Submittal Packages Overview	4
B. Setting the Submittal Coordinator	5
<b>II. Creating Submittal Packages</b>	7
A. General Tab	9
B. Status Tab	9
C. Workflow Template Tab	10
D. Submittals Tab	11
E. Schedule Tab	11
F. SDA Data Tab	12
G. Issues Tab	12
H. Attachments Tab	13
<b>III. Version Document</b>	16
<b>IV. Creating Submittal Packages with a Single Submittal</b>	17
A. Populating the Workflow (Single Reviewer)	25
B. Entering the First Review Cycle	26
<b>V. Creating Submittal Packages with Multiple Submittals</b>	39
A. Populating the Workflow (Multiple Reviewers)	45
B. Entering the First Review Cycle	46
<b>VI. Updating Submittals, Single Reviewer</b>	67
A. Edit Review Cycle Names	68
B. Edit Review Cycle Dates	69
C. Enter a New Review Cycle	70
D. Delete a Review Cycle	72
<b>VII. Updating Submittals, Multiple Reviewers</b>	73
A. Edit Multiple Reviewer Names	74
B. Edit Review Cycle Dates	76
C. Enter a New Review Cycle	77
D. Delete a Review Cycle	78
<b>VIII. Editing Submittal Packages</b>	80

<b>Section Title</b>	<b>Page Number</b>
A. Add Submittals to the Package	81
B. Edit Information in all Submittals Within the Package	82
<b>IX. Creating and Printing Transmittals</b>	84
<b>X. Monitoring Submittal Status Through Reporting</b>	89
<b>XI. Alert Subscriptions</b>	91

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## I. Submittal Packages and Submittals

Technical submittals, administrative requirements, samples, designs, plan reviews, permits – anything that requires a review process can be tracked in the submittal module.

Examples include each stage of the review cycle, tracking who received it and when; which submittals were approved and which are pending; which are overdue and by how many days; and who is currently responsible. Contract Management will automatically create Transmittals for submittals.

**NOTE:** Submittal Packages and Items may already exist at the start of the project, created through the project template. Those items can be managed like any other manually created submittal.

The standard Submittal Packages include:

- Bidding and Contract Award Phase
- Project Close Out Phase
- Construction Administration Phase
- Construction Document Phase
- Design Development Phase
- Post Occupancy Review Phase
- Schematic Design Phase

Packages may also be created to track non-technical submission items like warranties.

### A. Submittal Packages Overview

Organizing submittal items into packages enables them to be reviewed at a summary or a detailed level. The **Submittal Packages** log window displays a one-line summary for each submittal package.

The **Submittal Log** may be grouped into packages of detailed Submittals. A Submittal Package can be thought of as a folder holding a group of detailed submittals. Only high-level information needs to be entered on the Submittal Package – details are entered in the submittal documents. Packages can be organized by CSI, Vendor, type of work, etc.

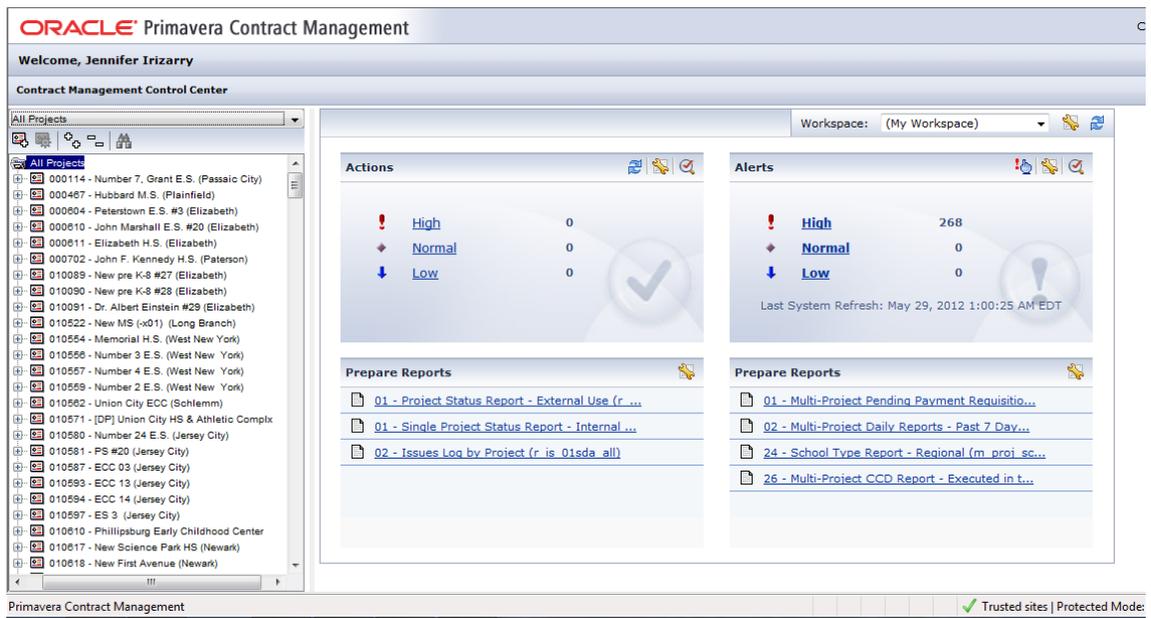
**NOTE:** Drawings and other documents can be attached to Submittals via the **Attachments** process outlined at the end of this document.

## B. Setting the Submittal Coordinator

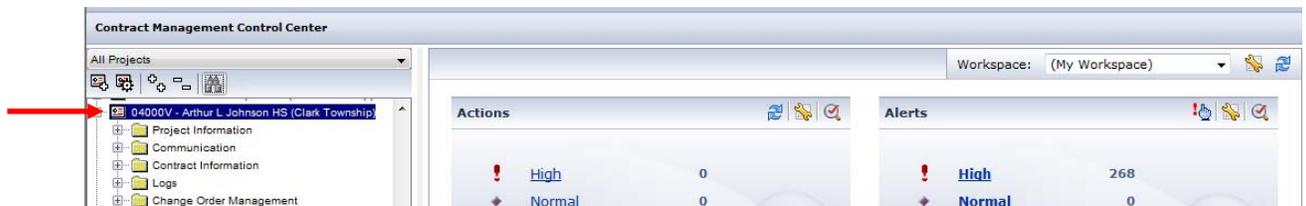
The submittal coordinator is the person who is responsible for making sure that submittals from contractors are forwarded to team members on a timely basis. There can only be one submittal coordinator set for a project, but the submittal coordinator may be changed as the project moves from phase to phase.

**IMPORTANT:** If you do not have access to SDA Data, please contact the SDA Project Manager to assign the Submittal Coordinator.

1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



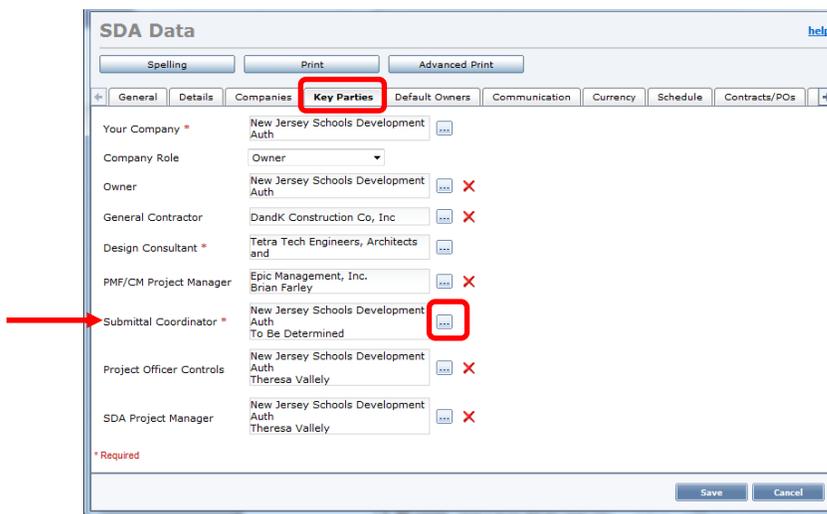
2. Select your desired project.



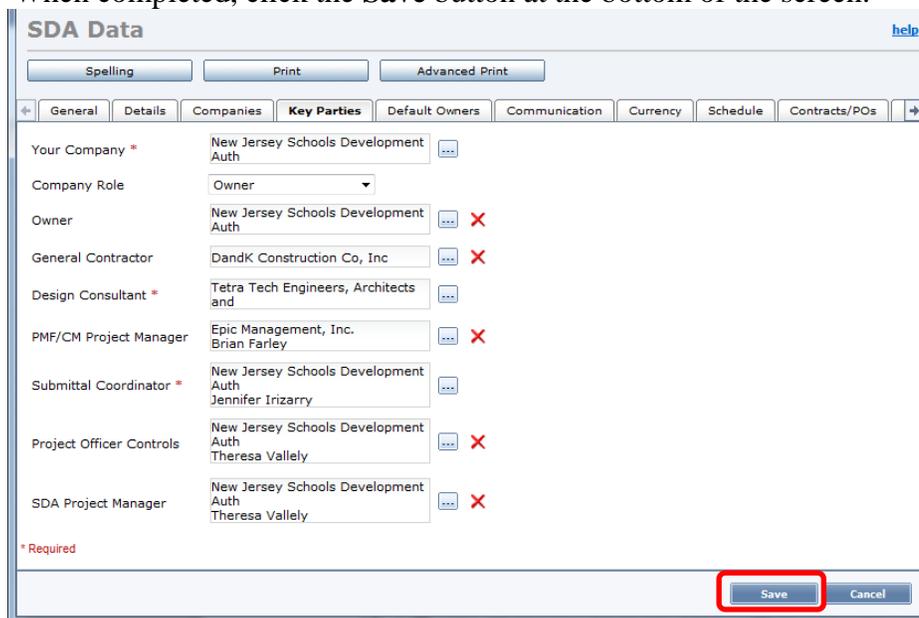
- Right click on the Project name and choose **SDA Data** from the displayed menu, or click the icon on the menu.



- Click the **Key Parties** tab. If not already selected, click the select button next to Submittal Coordinator field to select or change the name in this field using the contact list provided.



- When completed, click the **Save** button at the bottom of the screen.



## II. Creating Submittal Packages

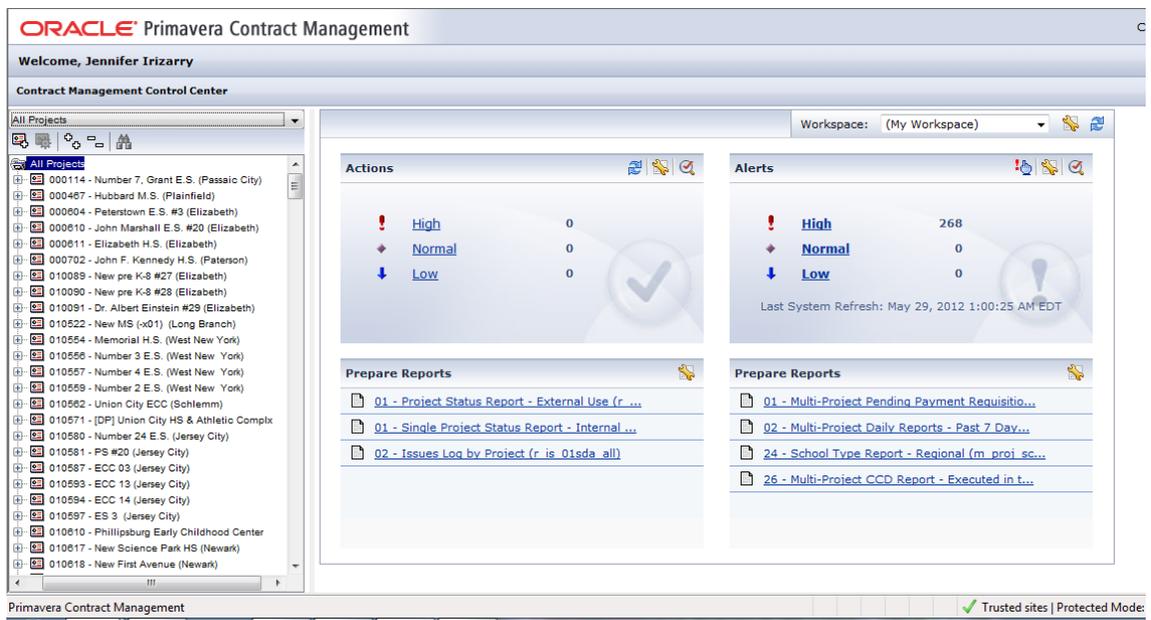
A list of standard Submittal Packages and Submittals will be imported into each project as it is created.

The standard Submittal Packages include:

- Bidding and Contract Award Phase
- Project Close Out Phase
- Construction Administration Phase
- Construction Document Phase
- Design Development Phase
- Post Occupancy Review Phase
- Schematic Design Phase

To create additional Submittal Packages perform the following steps.

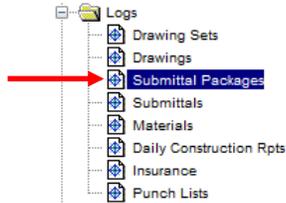
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



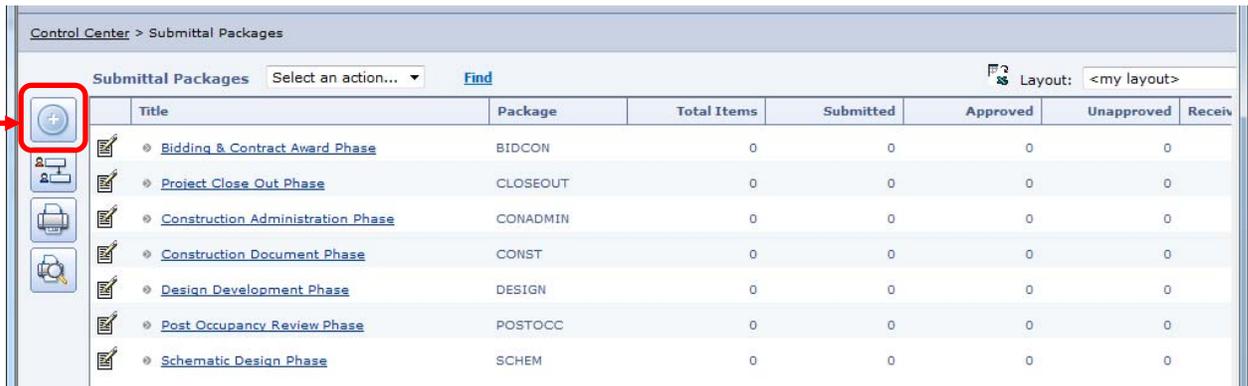
2. Select your desired project.



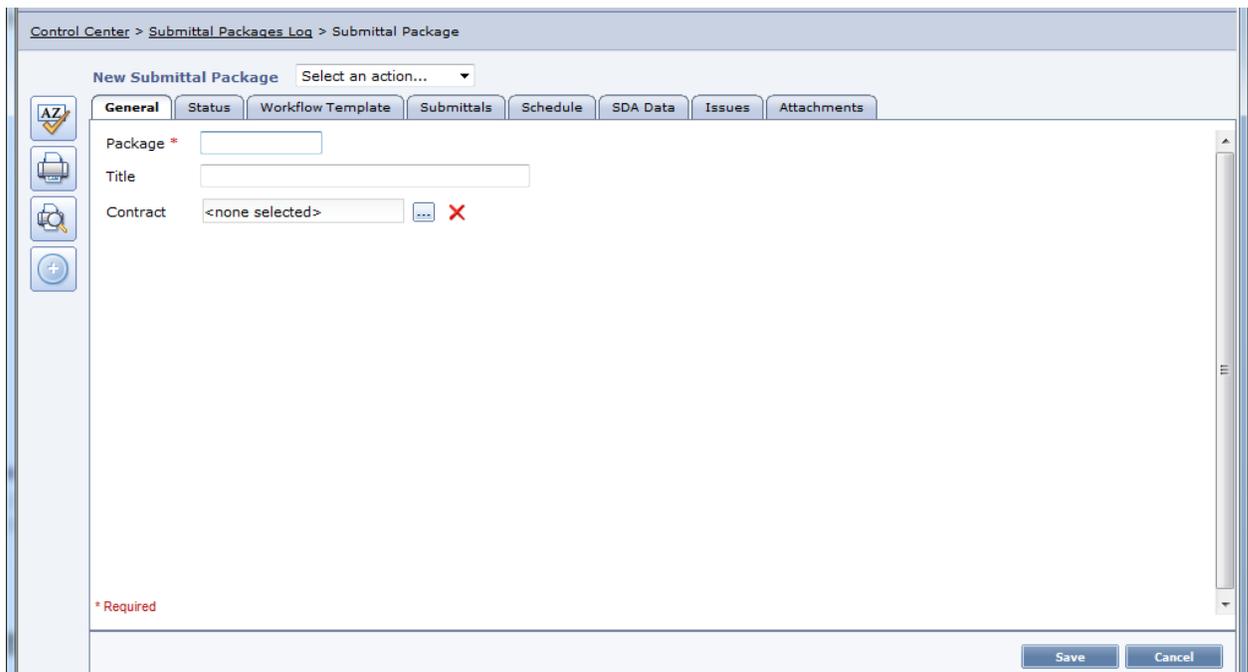
3. Open the **Logs** folder (a list of subfolders will display) and select **Submittal Packages**.



4. The **Submittal Package log** displays. This log shows that custom Submittal packages have already been added. Click the **Add Document** button to add a new Submittal package.



5. The **Submittal Package** screen displays. It is divided into several sections:



## A. General Tab

The screenshot shows the 'General' tab of the 'New Submittal Package' form. The breadcrumb path is 'Control Center > Submittal Packages Log > Submittal Package'. The form has a title bar 'New Submittal Package' and a dropdown menu 'Select an action...'. Below the title bar are tabs for 'General', 'Status', 'Workflow Template', 'Submittals', 'Schedule', 'SDA Data', 'Issues', and 'Attachments'. The 'General' tab is active and contains the following fields:

- Package \* (Required): UST DOC
- Title: Underground Storage Tank Documents
- Contract: Construction (NT-0032-C02) with a select button (indicated by a red box and an 'X' icon)

At the bottom left, there is a red asterisk and the text '\* Required'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- **Package** – Enter a unique package number (this is a required field).
- **Title** – Add a title for the package. Title should reflect overall summary of all individual submittals in this package.
- **Contract** – Reference a contract, if applicable. Use the **select** button next to the field to select a contract.

## B. Status Tab

The screenshot shows the 'Status' tab of the 'New Submittal Package' form. The breadcrumb path is 'Control Center > Submittal Packages Log > Submittal Package'. The form has a title bar 'New Submittal Package' and a dropdown menu 'Select an action...'. Below the title bar are tabs for 'General', 'Status', 'Workflow Template', 'Submittals', 'Schedule', 'SDA Data', 'Issues', and 'Attachments'. The 'Status' tab is active and contains the following fields:

- Ball in Court: <none selected> with a select button (indicated by a red box and an 'X' icon)
- Priority: Normal (dropdown menu)
- Status: (dropdown menu)
- Required Start: (text input field)
- Required Finish: (text input field)
- Total Items: 0
- Submitted: 0
- Approved: 0
- Unapproved: 0
- % Complete: 0%

At the bottom right, there are 'Save' and 'Cancel' buttons.

- **Ball in Court** – If desired, the Ball in Court can be set at the package level. Click the **select** button next to the field to select a name.
- **Priority** – Normal is the default, can be changed to High or Low as necessary.
- **Status** – Select **New Item** from the drop down box. Later, the status should be set to **Closed** when all submittals referenced in the package have been reviewed.
- **Required Start / Required Finish** – Contract Management calculates the values for these fields based on the earliest Required Start date and the latest Required Finish date of all the submittals in the package. These dates define when this package should be completed.
- **Total Items / Submitted / Approved / Unapproved / % Complete** – Contract Management automatically calculates the values for these fields based on the information entered for all the submittals in the package.

### C. Workflow Template Tab

The names for each reviewer will be established in this section.

**NOTE:** Setting the workflow on the Package allows it to be copied to each Submittal item created within the Package. It can be modified on an exception basis as required.

- **Received From** - Click the **select** button next to the field to select the contact from whom you will receive the submittal package.
- **Sent To** - Click the **select** button next to the field to select the contact you will send the submittal package to.
- **Returned By** - Click the **select** button next to the field to select the contact who will return the submittal package to you.
- **Forwarded To** - Click the **select** button next to the field to select the contact you will forward the submittal package to.

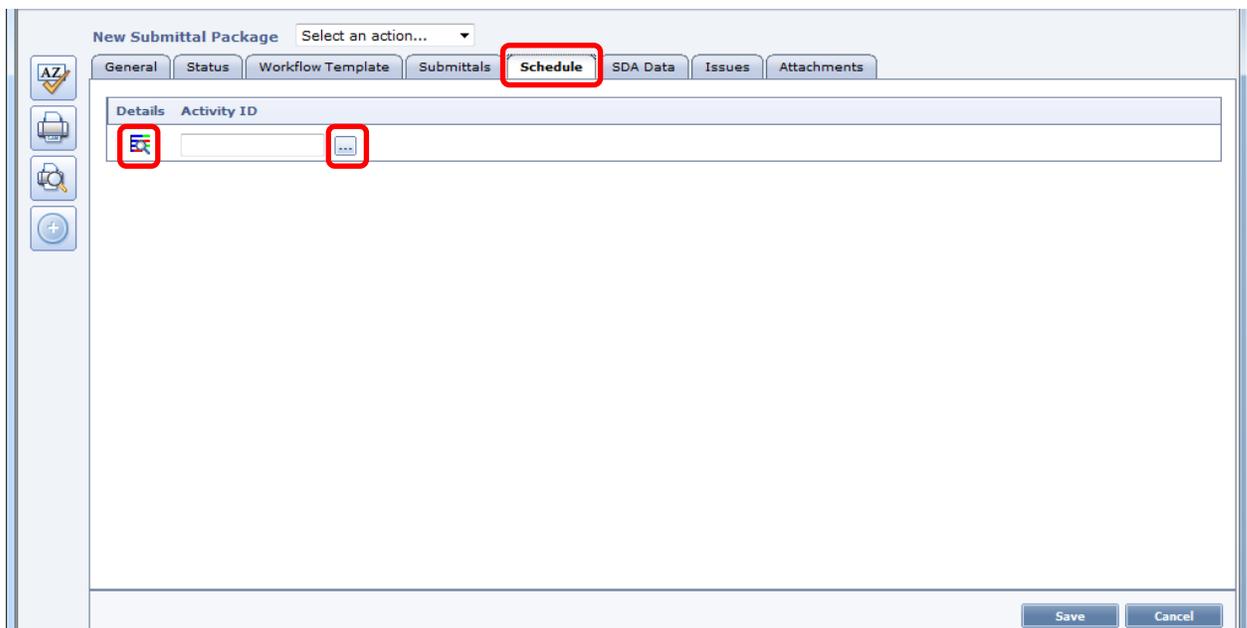
## D. Submittals Tab

The actual tracking of Submittal dates, status and distribution is done at the detailed Submittal level. Detailed Submittals may be viewed and created through their packages, or directly through the Submittal Log.

It is recommended that you finish creating the Submittal Package first, then create the individual Submittals. See Section III of this document for instructions on creating Submittals for a single reviewer, or Section IV for instructions on creating Submittals for multiple reviewers.

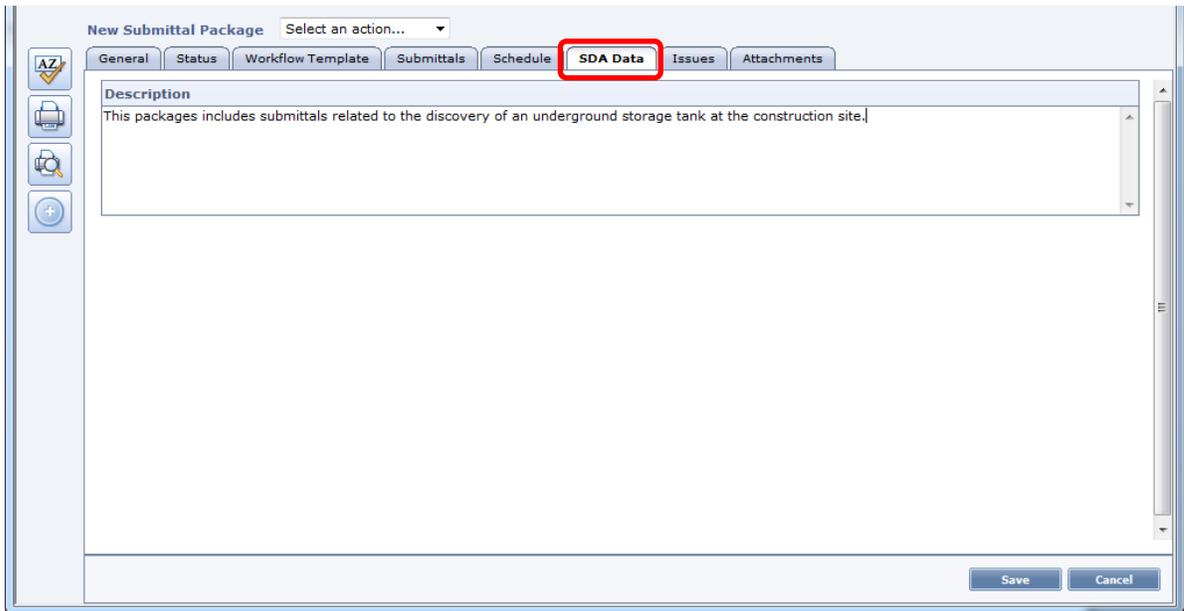
## E. Schedule Tab

**Important:** If no schedule has been linked to this project, this option will not be available.



- **Details** - Click the magnifying glass icon to open the **Schedule** dialog box to view early/actual start and finish dates, original and remaining durations, percent complete, and total float for a document linked to a Project Management activity.
- **Activity ID** – Click the **select** link on the right side of the screen to choose a scheduled activity from the **Select Activity** dialog box.

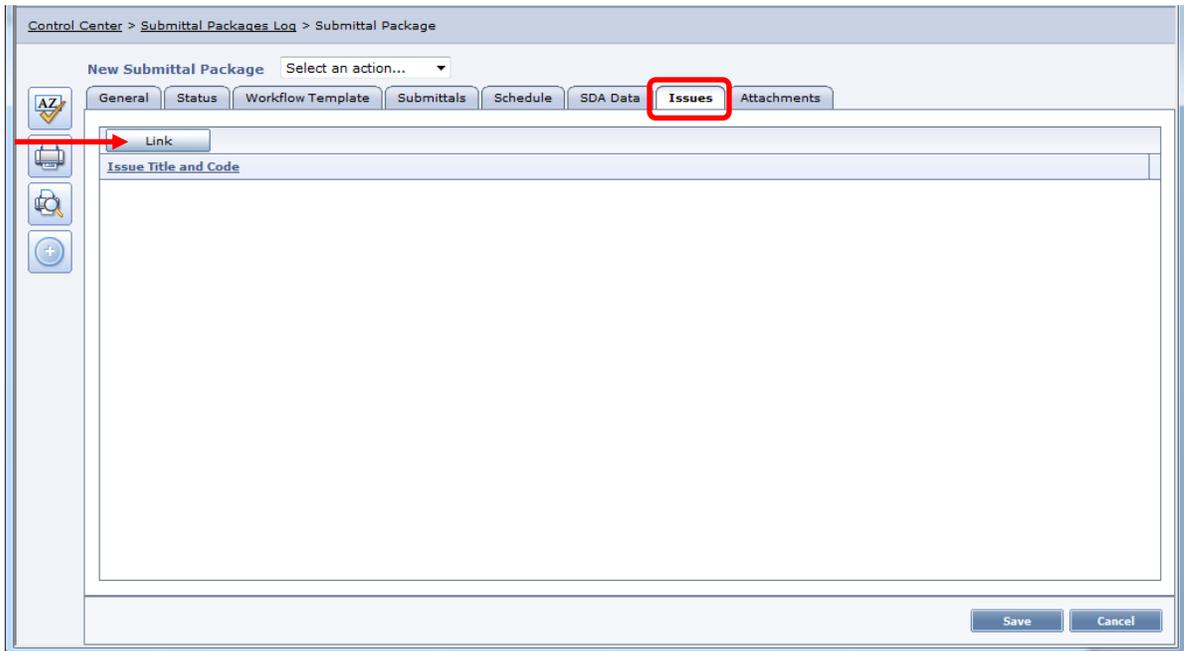
## F. SDA Data Tab



The screenshot shows the 'New Submittal Package' dialog box with the 'SDA Data' tab selected. The 'Description' field contains the text: 'This packages includes submittals related to the discovery of an underground storage tank at the construction site.' The 'Save' and 'Cancel' buttons are visible at the bottom right.

- **Description** – Enter an applicable description for this submittal package.

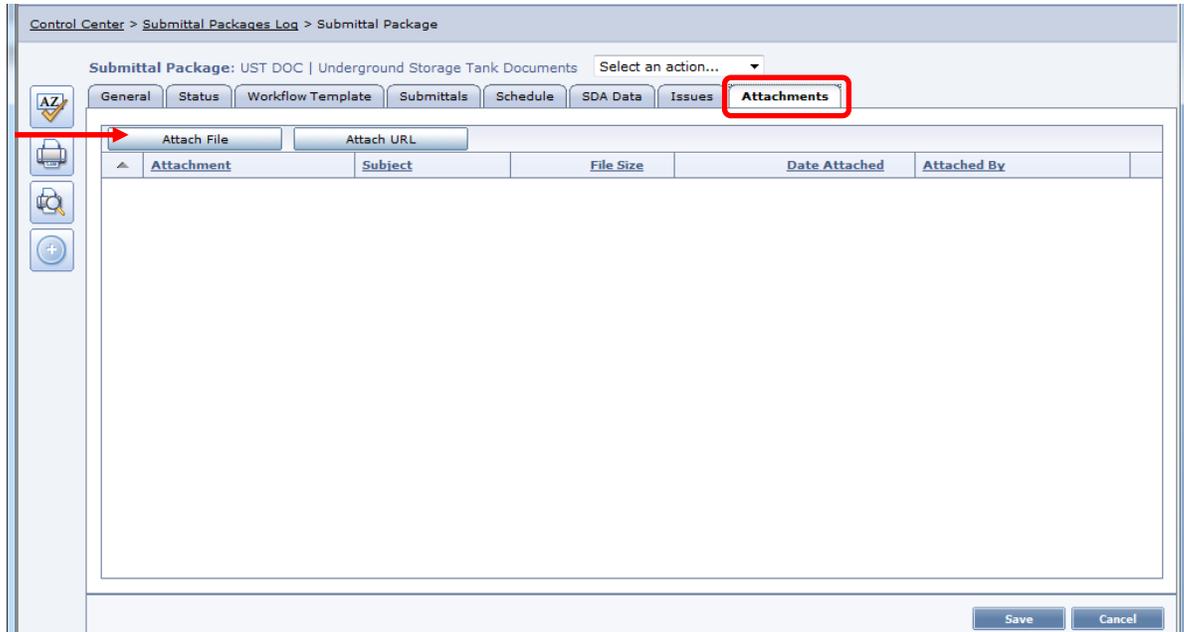
## G. Issues Tab



The screenshot shows the 'New Submittal Package' dialog box with the 'Issues' tab selected. A red arrow points to the 'Link' button. The 'Issue Title and Code' field is empty. The 'Save' and 'Cancel' buttons are visible at the bottom right.

- If this Submittal Package relates to an Issue that was previously entered in the Issues log, it can be linked to this package. Click the **Link** button and choose the desired issue from the dialog box.

## H. Attachments Tab



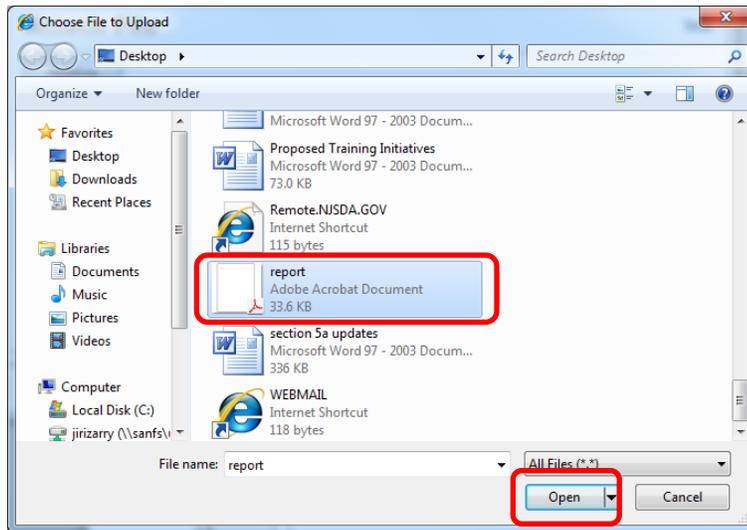
- To attach supporting documentation to this package, click the **Attach File** button.
- Click the **Browse** button to navigate to the document you wish to attach.

The "Attach File" dialog box has a "Spelling" button and a "help" link. It contains the following fields:

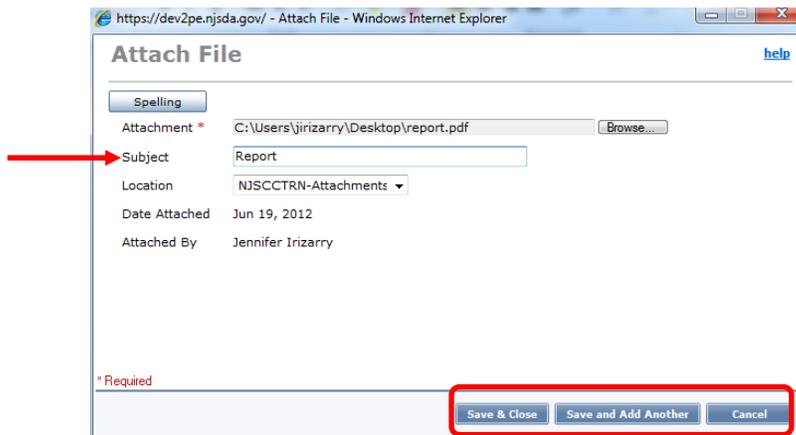
- "Attachment \*" with a text input field and a "Browse..." button (highlighted with a red box).
- "Subject" with a text input field.
- "Location" with a dropdown menu set to "NJSCTR-Attachments".
- "Date Attached" with the value "May 29, 2012".
- "Attached By" with the value "Jennifer Irizarry".

A red asterisk and the word "Required" are at the bottom left. At the bottom right are "Save & Close", "Save and Add Another", and "Cancel" buttons.

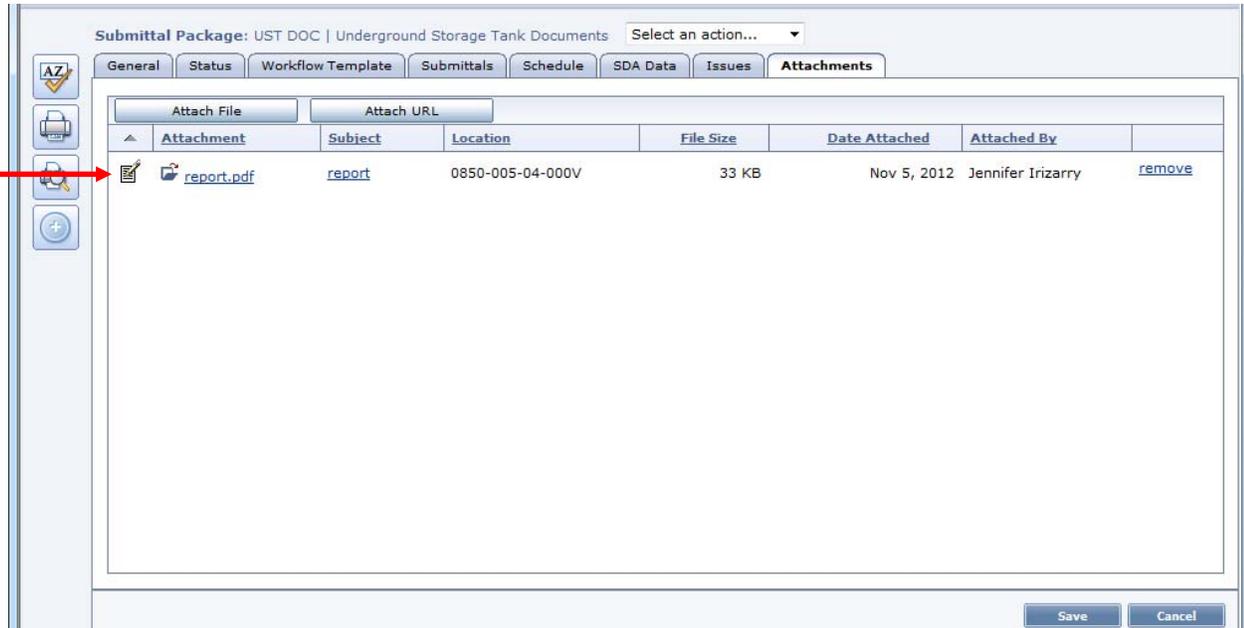
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



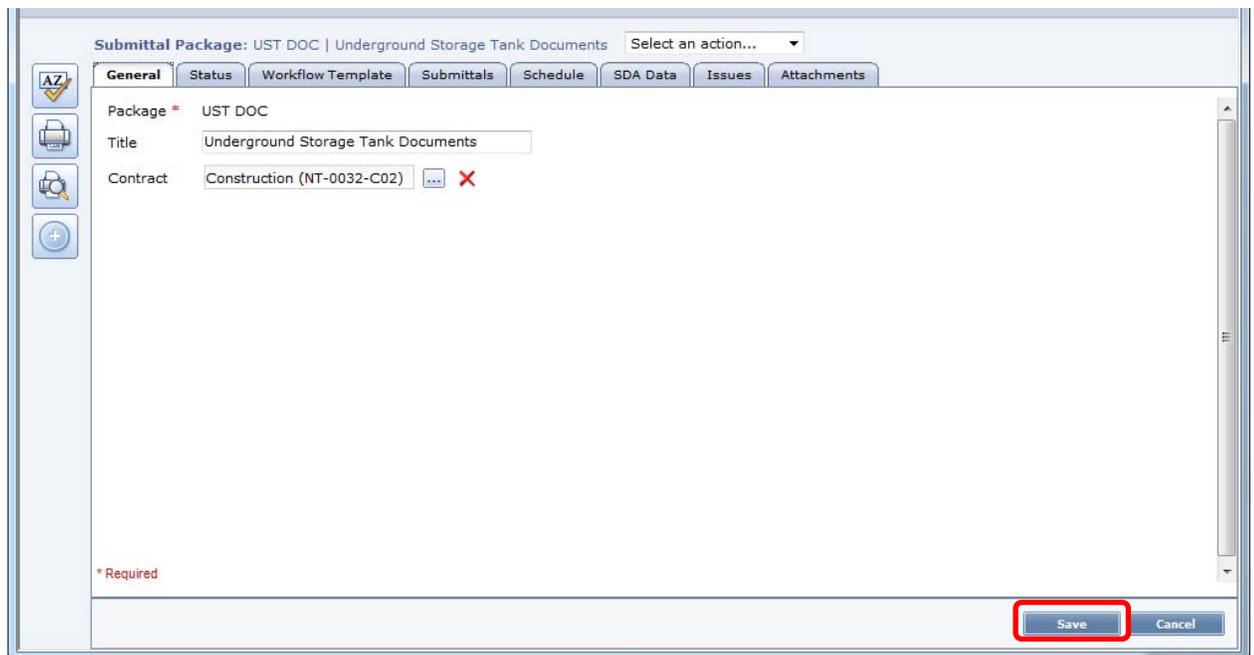
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



- The attached file will display in the **Attachments** section.



6. When completed, click the **Save** button at the bottom of the screen to save the package information.



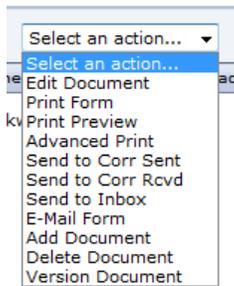
### III. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

#### A. Create a Document Version

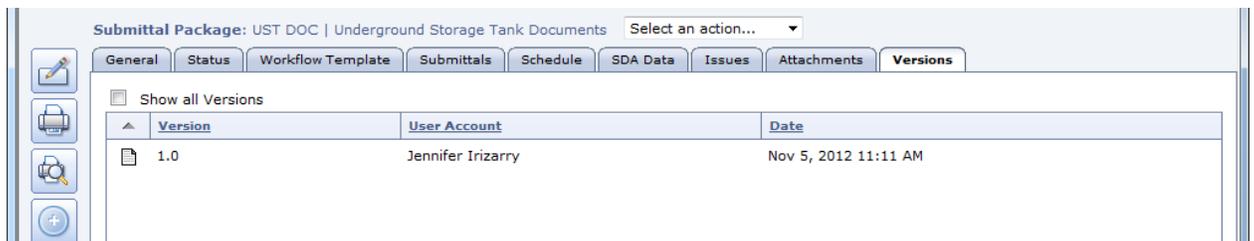
1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



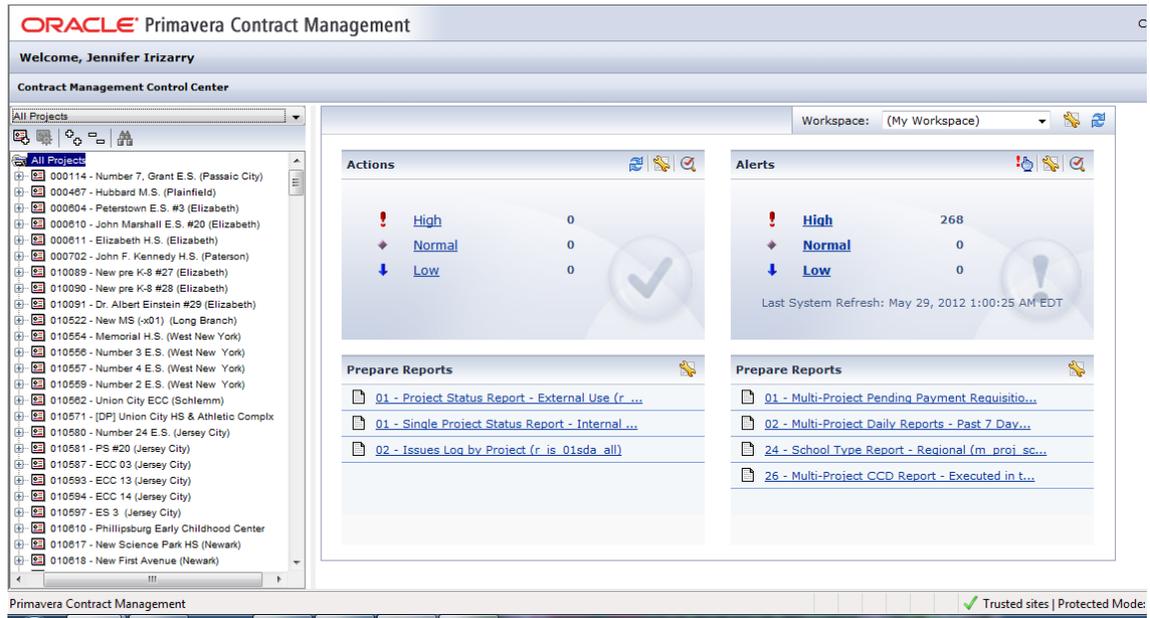
3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



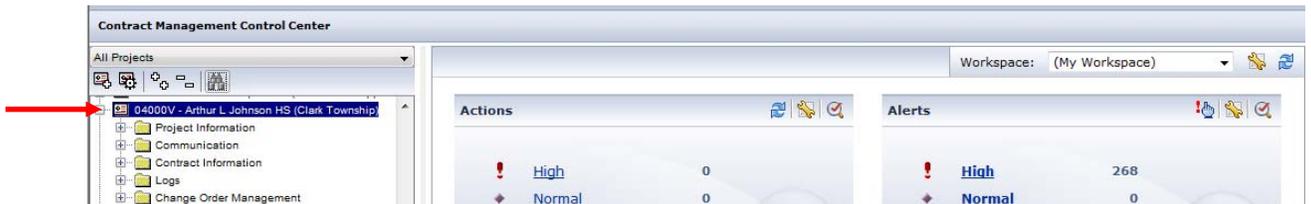
## IV. Creating Submittal Packages with a Single Submittal

It is recommended that you create Submittals from their associated Submittal packages so that the links between the two are properly established.

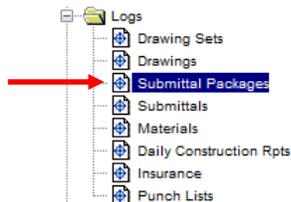
1. If necessary, find the applicable Submittal Package. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



3. Open the **Logs** folder (a list of subfolders will display) and select **Submittal Packages**.



4. The **Submittal Package log** displays. Locate the desired Submittal Package from the log and click the **title (blue link)** to open the package.

Control Center > Submittal Packages

Submittal Packages Select an action... Find Layout: <my layout>

Title	Package	Total Items	Submitted	Approved	Unapproved	Received
<a href="#">Bidding &amp; Contract Award Phase</a>	BIDCON	0	0	0	0	0
<a href="#">Project Close Out Phase</a>	CLOSEOUT	0	0	0	0	0
<a href="#">Construction Administration Phase</a>	CONADMIN	0	0	0	0	0
<a href="#">Construction Document Phase</a>	CONST	0	0	0	0	0
<a href="#">Design Development Phase</a>	DESIGN	0	0	0	0	0
<a href="#">Post Occupancy Review Phase</a>	POSTOCC	0	0	0	0	0
<a href="#">Schematic Design Phase</a>	SCHEM	0	0	0	0	0
<a href="#">Underground Storage Tank Documents</a>	UST DOC	0	0	0	0	0

5. When the package opens, click the **Submittals** tab and click the **Add** button to add a single submittal.

Submittal Package: UST DOC | Underground Storage Tank Documents Select an action...

General Status Workflow Template **Submittals** Schedule SDA Data Issues Attachments Versions

Add Add Multiple Submittals Update Package

Submittals	Date Received	Date Sent	Date Returned	Status	Date Forwarded	Ball in Court	BIC Contact	Received
------------	---------------	-----------	---------------	--------	----------------	---------------	-------------	----------

- A new submittal document is created with data from the Submittal Package document. ON the General Tab, the **Submittal\*** field has been pre-populated with the title from the Submittal Package plus the document number. In the example shown, UST DOC is the title from the Submittal Package, -001 indicates that this is the first document in the package. This number will increment with every document which is added to the package.

Control Center > Submittals Log > Submittal

New Submittal Select an action...

**General** Status Workflow Review Cycles Schedule Details Issues Attachments

Package Underground Storage Tank Documents (UST DOC) ... X

Submittal \* UST DOC -001

Title Underground Storage Tank Documents

Number 10

Category

Type

Required Start

Required Finish

Latest Review Cycle

Held 0

Elapsed 0

Overdue 0

\* Required

Save Cancel

- If necessary, change the information in the **Title** field.

Control Center > Submittals Log > Submittal

New Submittal Select an action...

**General** Status Workflow Review Cycles Schedule Details Issues Attachments

Package Underground Storage Tank Documents (UST DOC) ... X

Submittal \* UST DOC -001

Title Underground Storage Tank Documents

Number 10

Category

Type

Required Start

Required Finish

Latest Review Cycle

Held 0

Elapsed 0

Overdue 0

\* Required

Save Cancel

8. If the system has not generated the correct document number in the **Number** field, you will need to change the number.

The screenshot shows the 'New Submittal' form in the Control Center. The form is titled 'Control Center > Submittals Log > Submittal'. It has a 'New Submittal' button and a 'Select an action...' dropdown. The form is divided into several tabs: 'General', 'Status', 'Workflow', 'Review Cycles', 'Schedule', 'Details', 'Issues', and 'Attachments'. The 'General' tab is active. The form contains the following fields:

- Package: Underground Storage Tank Documents (UST DOC) ... X
- Submittal \*: UST DOC -001
- Title: Underground Storage Tank Documents
- Number: 10 (highlighted with a red arrow)
- Category: (empty dropdown)
- Type: (empty dropdown)
- Required Start: (empty date field)
- Required Finish: (empty date field)
- Latest Review Cycle: (empty field)
- Held: 0
- Elapsed: 0
- Overdue: 0

At the bottom of the form, there is a '\* Required' label and 'Save' and 'Cancel' buttons.

9. Choose the applicable **Category** by making your selection from the drop down list.

The screenshot shows the 'New Submittal' form in the Control Center, similar to the previous screenshot. The 'Category' dropdown menu is open, showing a list of categories. A red arrow points to the 'Category' field. The categories listed are:

- Product Data
- Shop Drawing
- Mock Up
- Sample
- Certification
- As-Built
- Close-Out
- Warranty
- Test Report
- Operation/Maintenance Manual
- MSDS - Material Safety Data Sheets
- Lead

The 'Number' field still contains the value '10'. The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

10. Choose the applicable **Type** by making your selection from the drop down list.

Control Center > Submittals Log > Submittal

New Submittal Select an action...

General Status Workflow Review Cycles Schedule Details Issues Attachments

Package Underground Storage Tank Documents (UST DOC) ... X

Submittal \* UST DOC -001

Title Underground Storage Tank Documents

Number 10

Category Product Data

Type **Construction**

Required Start

Required Finish

Latest Review Cycle

Held 0

Elapsed 0

Overdue 0

\* Required

Save Cancel

11. The **Required Start** and **Required Finish** are the date ranges required to perform the reviewing process. **Important:** You *must* enter a **Required Start** date in order for the system calculated fields to display correctly. Use the **calendar icon** to the right of each field to select the dates.

Control Center > Submittals Log > Submittal

New Submittal Select an action...

General Status Workflow Review Cycles Schedule Details Issues Attachments

Package Underground Storage Tank Documents (UST DOC) ... X

Submittal \* UST DOC -001

Title Underground Storage Tank Documents

Number 10

Category Product Data

Type Construction

Required Start Nov 1, 2012

Required Finish Nov 30, 2012

Latest Review Cycle

Held 0

Elapsed 0

Overdue 0

\* Required

Save Cancel

12. The **Latest Review Cycle** field will automatically display the number of the latest review cycle taken from the Review Cycles Section. By default, no value will display in this field until the Review Cycle is established.

The screenshot shows the 'New Submittal' form with the following fields and values:

Field	Value
Package	Underground Storage Tank Documents (UST DOC)
Submittal *	UST DOC -001
Title	Underground Storage Tank Documents
Number	10
Category	Product Data
Type	Construction
Required Start	Nov 1, 2012
Required Finish	Nov 30, 2012
Latest Review Cycle	
Held	0
Elapsed	0
Overdue	0

13. The **Held** field is the number of days the Ball in Court contact has held the submittal. By default, the value for this field will be zero. Contract Management automatically calculates this value in one of the following ways:

- If at least one review cycle exists and no dates are entered for any of the cycles, the days **Held** is the difference between “today” and the Required Start date.
- If at least one status date is entered, the days **Held** is the difference between “today” and the last status date for the latest review cycle.
- If no dates are entered and the Required Start is blank, Contract Management calculates the difference between “today” and the Proceed Date to determine the days **Held**. **Note:** The **Proceed Date** was entered when the project was created and is located on the **SDA Data** screen at the project level.
- If the review cycle is approved, the days **Held** is zero.

The screenshot shows the 'New Submittal' form with the following fields and values:

Field	Value
Package	Underground Storage Tank Documents (UST DOC)
Submittal *	UST DOC -001
Title	Underground Storage Tank Documents
Number	10
Category	Product Data
Type	Construction
Required Start	Nov 1, 2012
Required Finish	Nov 30, 2012
Latest Review Cycle	
Held	0
Elapsed	0
Overdue	0

14. The **Elapsed** field is the number of days the submittal has been open. By default, the value for this field will be zero. Contract Management automatically calculates this value in one of the following ways:

- If the latest review cycle is not approved and at least one date is entered, the days elapsed is the difference between “today” and the Submittal Preparation Start Date.
- If the submittal is approved, the days elapsed is the difference between the last date and the Submittal Preparation Start Date.

The screenshot shows the 'New Submittal' form with the following fields and values:

Field	Value
Package	Underground Storage Tank Documents (UST DOC)
Submittal *	UST DOC -001
Title	Underground Storage Tank Documents
Number	10
Category	Product Data
Type	Construction
Required Start	Nov 1, 2012
Required Finish	Nov 30, 2012
Latest Review Cycle	
Held	0
Elapsed	0
Overdue	0

A red arrow points to the 'Elapsed' field.

15. The **Overdue** field is automatically calculated by Contract Management and shows the number of days by which the review cycle has exceeded the required finish date. By default, the value for this field will be zero.

The screenshot shows the 'New Submittal' form with the following fields and values:

Field	Value
Package	Underground Storage Tank Documents (UST DOC)
Submittal *	UST DOC -001
Title	Underground Storage Tank Documents
Number	10
Category	Product Data
Type	Construction
Required Start	Nov 1, 2012
Required Finish	Nov 30, 2012
Latest Review Cycle	
Held	0
Elapsed	0
Overdue	0

A red arrow points to the 'Overdue' field.

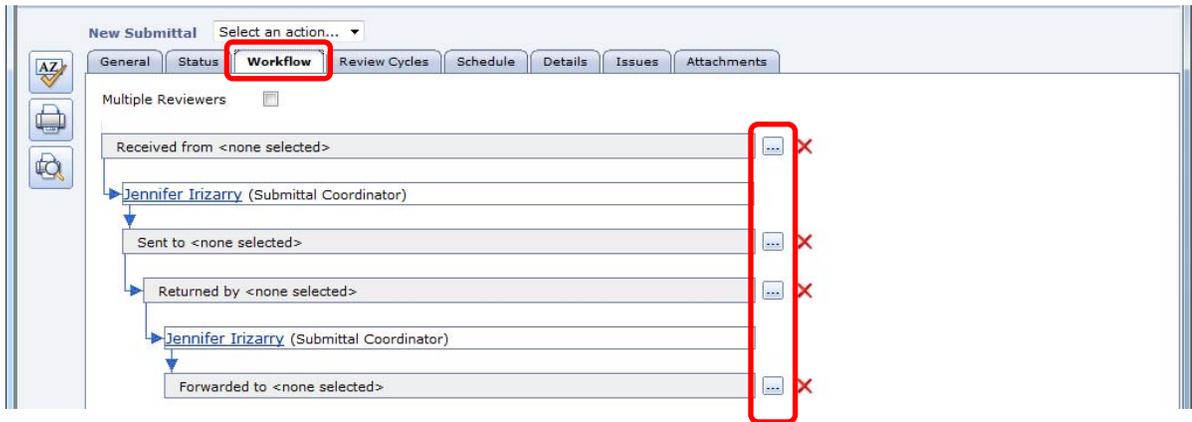
16. Click the **Status** tab.

The screenshot shows a web-based interface for creating a new submittal. The breadcrumb trail at the top reads 'Control Center > Submittals Log > Submittal'. Below this is a 'New Submittal' section with a 'Select an action...' dropdown. A horizontal tab bar contains 'General', 'Status', 'Workflow', 'Review Cycles', 'Schedule', 'Details', 'Issues', and 'Attachments'. The 'Status' tab is highlighted with a red rectangular box. On the left side of the form, there are three icons: a checkmark, a printer, and a magnifying glass. The main form area contains three fields: 'Ball in Court' with a text input containing '<none selected>', 'Priority' with a dropdown menu set to 'Normal', and 'Status' with an empty text input. At the bottom right, there are 'Save' and 'Cancel' buttons.

- The **Ball in Court** field will be automatically populated by Contract Management based on the latest Review Cycle. Initially, it will display **<none selected>**.
- The **Priority** field defaults to **Normal**. If desired, change the value in this field to **High** or **Low** by selecting the drop down box.
- The **Status** field will be automatically populated by Contract Management based on the status of the most recent Review Cycle.

## A. Populating the Workflow (Single Reviewer)

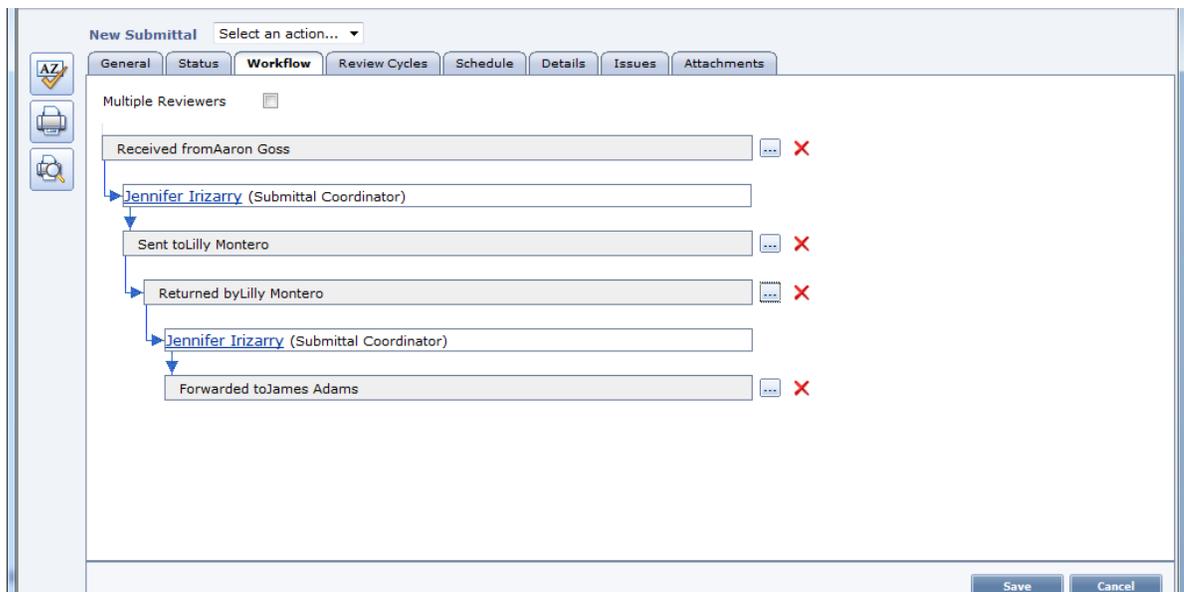
1. Click the **Workflow** tab. If no names were selected at the package level, they can be entered here.



The screenshot shows the 'New Submittal' interface with the 'Workflow' tab selected. The 'Multiple Reviewers' checkbox is unchecked. The workflow steps are: 'Received from <none selected>', 'Jennifer Irizarry (Submittal Coordinator)', 'Sent to <none selected>', 'Jennifer Irizarry (Submittal Coordinator)', and 'Forwarded to <none selected>'. A red box highlights the 'select' buttons (three dots) for each step, with a red 'X' next to each.

- **Received From** - Click the **select** button to select the contact ID and initials of the contact from whom you will receive the submittal.
- **Sent To** - Click the **select** button to select the contact ID and initials of the contact you will send the submittal to.
- **Returned By** - Click the **select** button to select the contact ID and initials of the contact who will return the submittal to you.
- **Forwarded To** - Click the **select** button to select the contact ID and initials of the contact you will forward the submittal to.

2. An example of a completed tab is shown:



The screenshot shows the 'New Submittal' interface with the 'Workflow' tab selected. The 'Multiple Reviewers' checkbox is unchecked. The workflow steps are: 'Received from Aaron Goss', 'Jennifer Irizarry (Submittal Coordinator)', 'Sent to Lilly Montero', 'Returned by Lilly Montero', and 'Forwarded to James Adams'. Each step has a 'select' button (three dots) and a red 'X' next to it.

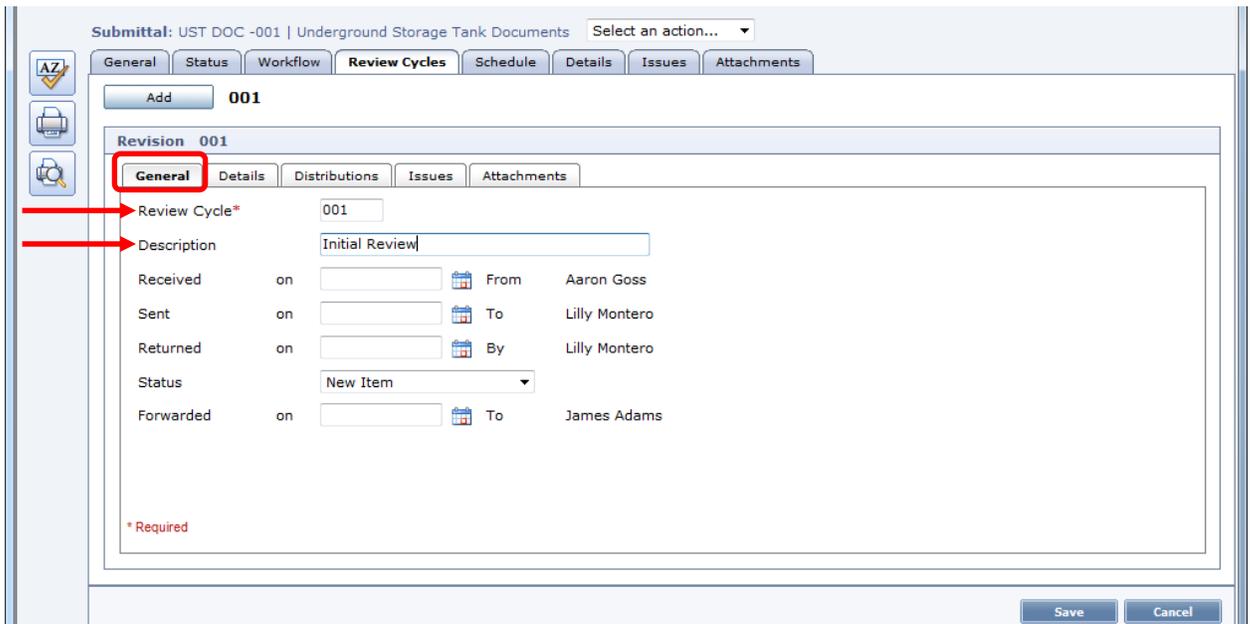
## B. Entering the First Review Cycle

The Review Cycle section is where the specifics are tracked for each cycle of the submittal including the dates received, sent and the status. If the submittal is not approved, a new Review Cycle is created to track the next round. There is no limit to the number of Review Cycles per Submittal.

1. Click the **Review Cycles** tab and click the **Add** button to create a review cycle.



2. Under the General sub-tab, the first review cycle will display numbered **001** in the **Review Cycle\*** field. Enter a brief description of the review cycle in the **Description** field, such as Initial Review, as shown in the example below.



- Complete the **date fields** as the document is received from the Contractor or internal reviewer, and as it is passed from party to party for review. Notice that the **To/From** names have been loaded from the selections made in the Workflow.

Submittal: UST DOC -001 | Underground Storage Tank Documents

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Details Distributions Issues Attachments

Review Cycle\* 001

Description Initial Review

Received on  From Aaron Goss

Sent on  To Lilly Montero

Returned on  By Lilly Montero

Status New Item

Forwarded on  To James Adams

\* Required

Save Cancel

- The first date in the **Received** field represents the date that the submittal was received from the Contractor or internal reviewer. When this date is entered, the Ball in Court will be set to the Submittal Coordinator.

Submittal: UST DOC -001 | Underground Storage Tank Documents

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Details Distributions Issues Attachments

Review Cycle\* 001

Description Initial Review

Received on **Nov 2, 2012** From Aaron Goss

Sent on  To Lilly Montero

Returned on  By Lilly Montero

Status New Item

Forwarded on  To James Adams

\* Required

Save Cancel

- The second date in the **Sent** field represents the date that the submittal was forwarded by the Submittal Coordinator to the reviewer. When this date is entered, the Ball in Court will be set to the reviewer.

The screenshot shows the 'Revision 001' form in a web application. The form is titled 'Revision 001' and has tabs for 'General', 'Details', 'Distributions', 'Issues', and 'Attachments'. The 'General' tab is selected. The form contains the following fields:

Review Cycle*	001
Description	Initial Review
Received	on Nov 2, 2012 From Aaron Goss
Sent	on <b>Nov 5, 2012</b> To Lilly Montero
Returned	on [ ] By Lilly Montero
Status	New Item
Forwarded	on [ ] To James Adams

\* Required

Buttons: Save, Cancel

- The third date in the **Returned** field represents the date that the reviewer returned the submittal to the Submittal Coordinator. When this date is entered, the Ball in Court will be set to the Submittal Coordinator.

The screenshot shows the 'Revision 001' form in a web application. The form is titled 'Revision 001' and has tabs for 'General', 'Details', 'Distributions', 'Issues', and 'Attachments'. The 'General' tab is selected. The form contains the following fields:

Review Cycle*	001
Description	Initial Review
Received	on Nov 2, 2012 From Aaron Goss
Sent	on Nov 5, 2012 To Lilly Montero
Returned	on <b>Nov 19, 2012</b> By Lilly Montero
Status	New Item
Forwarded	on [ ] To James Adams

\* Required

Buttons: Save, Cancel

7. The **Status** field beneath the third date is for the reviewer's use in noting the status of the submittal. Updates made to the status here will also be reflected in the **Status** section of the document.

The screenshot shows the 'Revision 001' form in the 'Review Cycles' tab. The form includes fields for 'Review Cycle\*', 'Description', 'Received', 'Sent', 'Returned', 'Status', and 'Forwarded'. A red arrow points to the 'Status' field, which is currently set to 'New Item'. The 'Received' date is Nov 2, 2012, 'Sent' is Nov 5, 2012, and 'Returned' is Nov 19, 2012. The 'Forwarded' date is empty.

Field	Value
Review Cycle*	001
Description	Initial Review
Received	on Nov 2, 2012 From Aaron Goss
Sent	on Nov 5, 2012 To Lilly Montero
Returned	on Nov 19, 2012 By Lilly Montero
Status	New Item
Forwarded	on [ ] To James Adams

8. The fourth date in the **Forwarded** field represents the date that the Submittal Coordinator returned the submittal to the applicable party. When this date is entered, the Ball in Court will be set to the applicable party (either a Contractor or an internal reviewer).

The screenshot shows the 'Revision 001' form in the 'Review Cycles' tab. The 'Forwarded' date field is highlighted with a red box, showing 'Nov 20, 2012'. The 'Status' field is still 'New Item'. The 'Received', 'Sent', and 'Returned' dates are the same as in the previous screenshot.

Field	Value
Review Cycle*	001
Description	Initial Review
Received	on Nov 2, 2012 From Aaron Goss
Sent	on Nov 5, 2012 To Lilly Montero
Returned	on Nov 19, 2012 By Lilly Montero
Status	New Item
Forwarded	on Nov 20, 2012 To James Adams

- Click the **Details** sub-tab. If applicable, enter the number of **Sepias** and **Prints**, enter a **Drawing Date**, and include any required comments in the **Remarks** section.

Submittal: UST DOC -001 | Underground Storage Tank Documents

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General **Details** Distributions Issues Attachments

Sepias 0 Held 0  
Prints 0 Elapsed 0  
Drawing Date

Remarks  
please review this submittal

Save Cancel

- Click the **Distributions** sub-tab. If applicable, click the **Add** button to add additional contacts who should receive a copy of the submittal. An example of a completed tab is shown. A pending Transmittal (cover sheet) will be added to the Transmittal queue for each contact added to the Distributions list. From the Transmittal queue, you can create or print the transmittals. Section XI of this document will provide instructions on printing Transmittals for distribution.

**Important:** *If you want to generate a Transmittal, you must add names to the Distributions tab.*

Submittal: UST DOC -001 | Underground Storage Tank Documents

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

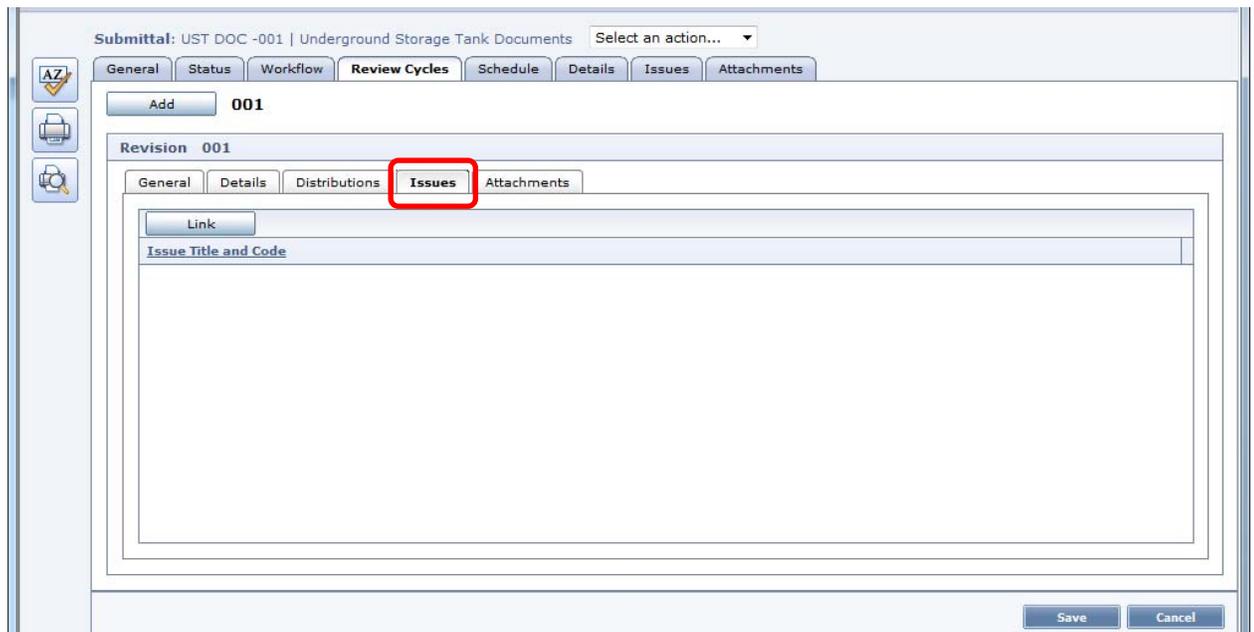
Revision 001

General Details **Distributions** Issues Attachments

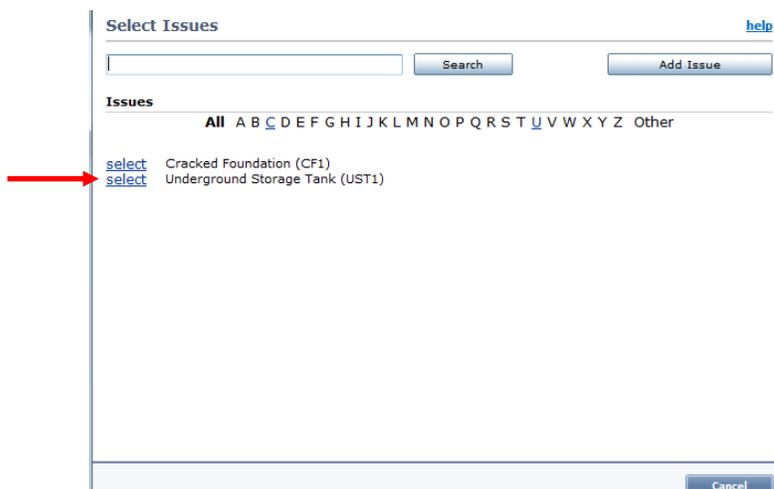
Add

Distributed to	Date	Copies	Remarks	Transmit		
Andrew Yosha	Nov 5, 2012	1		✓		<a href="#">delete</a>

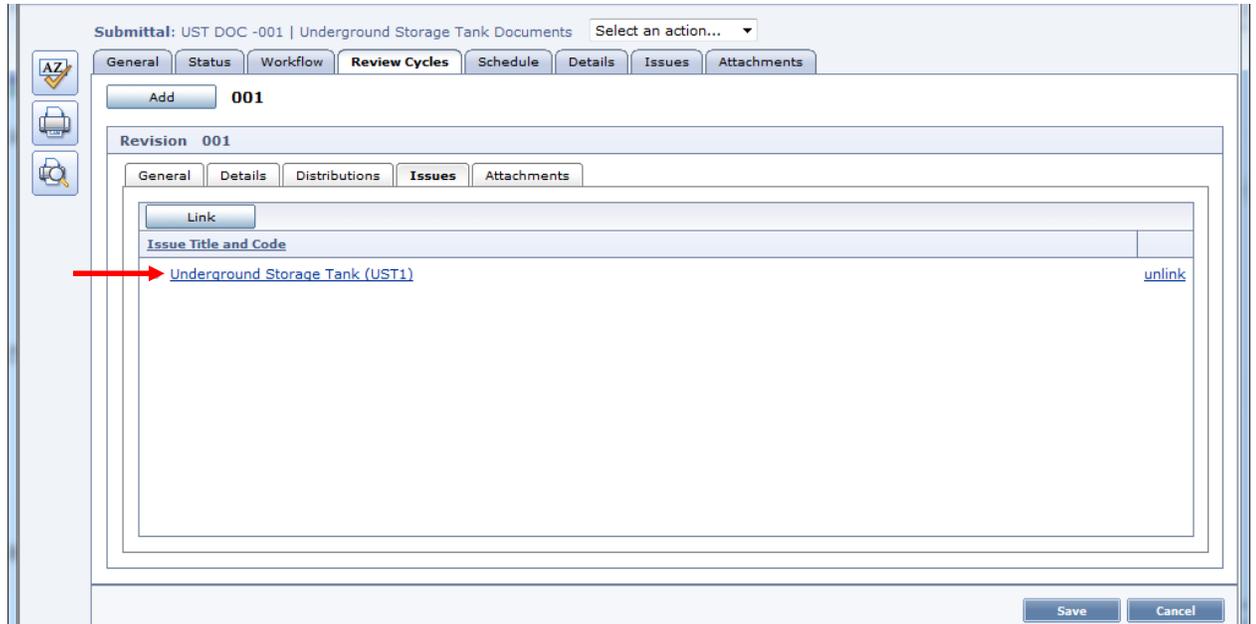
12. Click the **Issues** sub-tab. If this review cycle should be linked to an Issue previously logged in the Issues log, choose the **Link** button to select the desired Issue. **Note:** Issues can also be linked at the submittal document level.



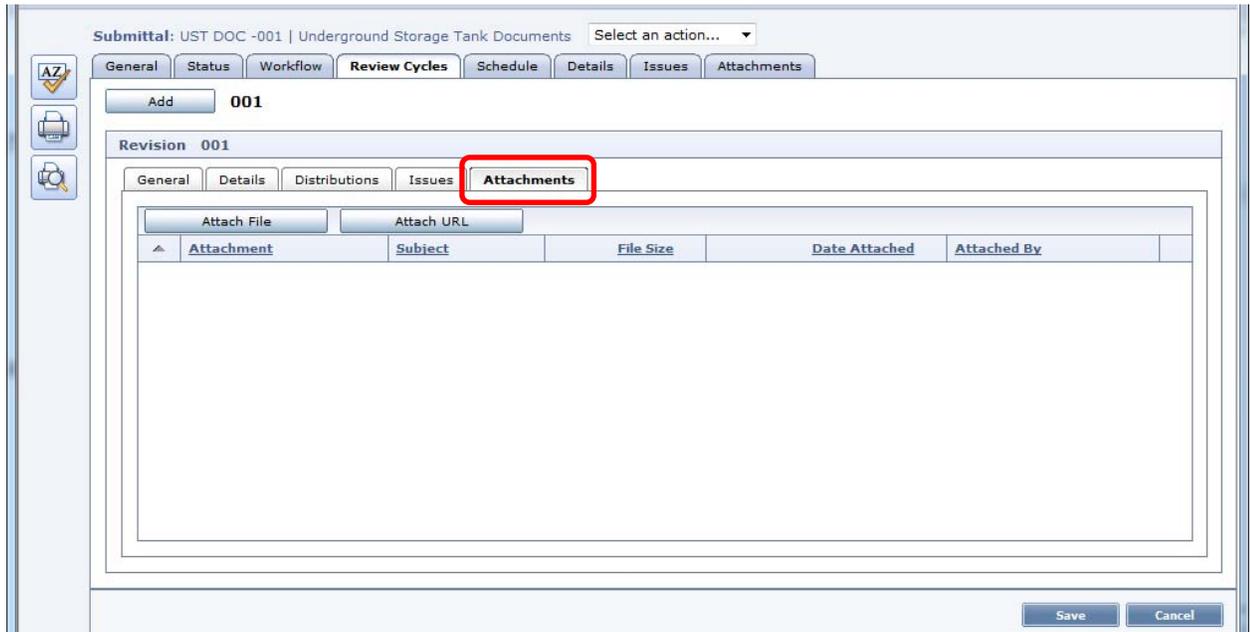
13. Choose the desired Issue by clicking the **select** link to the left of the Issue name.



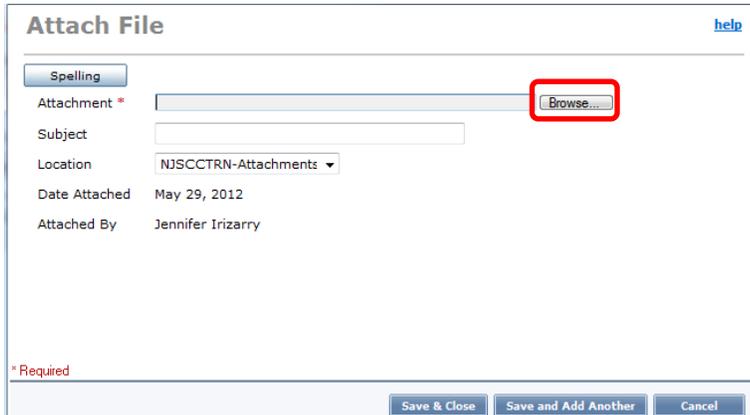
14. The selected Issue will display in the Issues sub-tab.



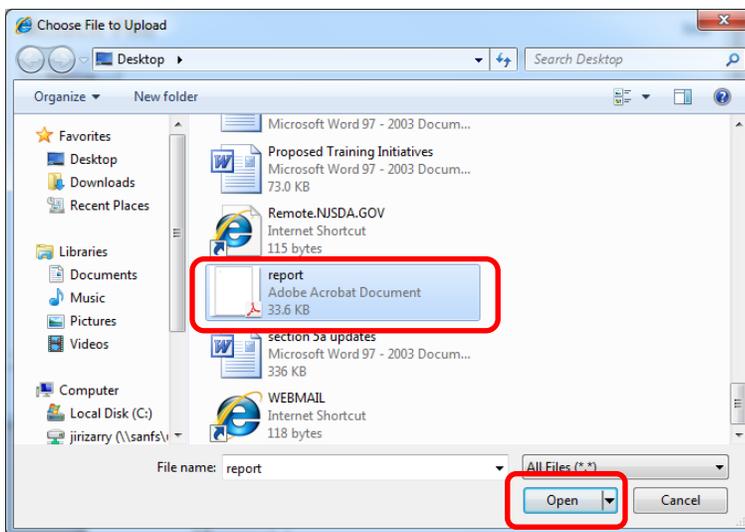
15. Click the **Attachments** sub-tab to attach any supporting documentation to this review cycle. Click the **Attach File** button. Note: Attachments can also be linked at the submittal document level.



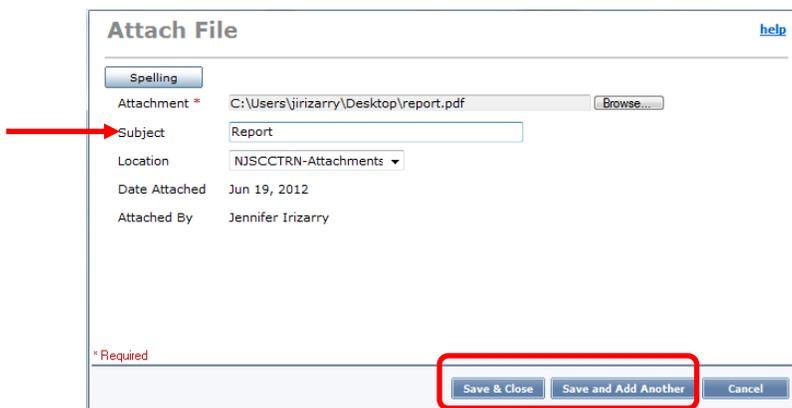
16. Click the **Browse** button to navigate to the document you wish to attach.



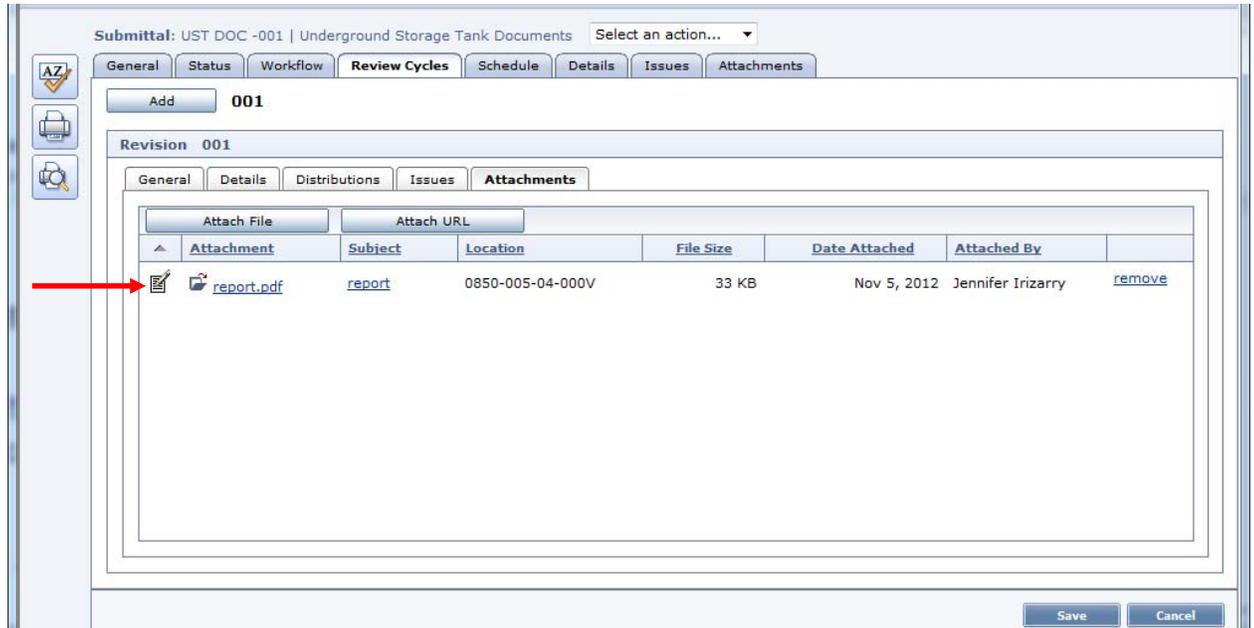
17. The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



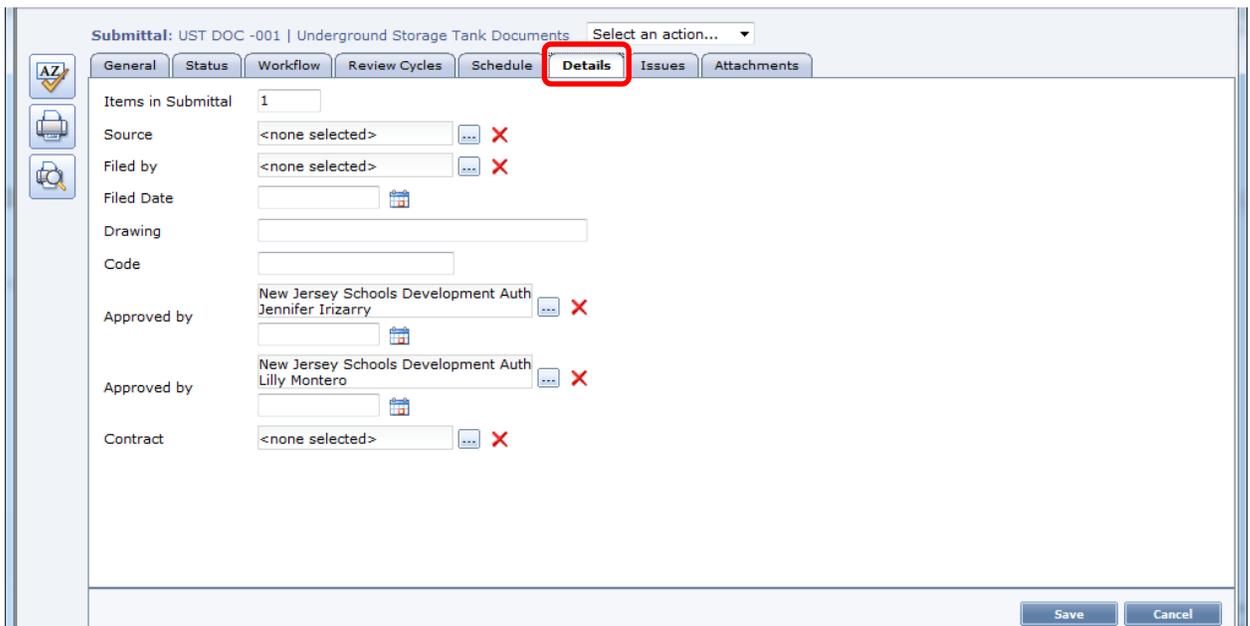
18. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close** to return to the submittal. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



22. The attached file will display in the **Attachments** sub-tab.



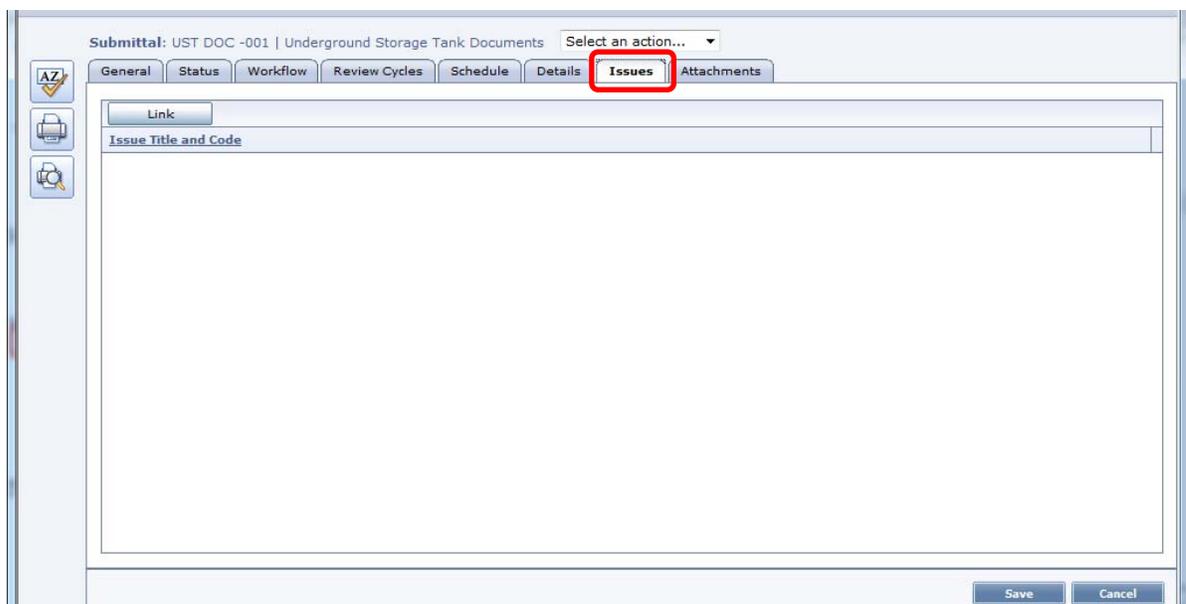
23. To complete the entry of the submittal, click the **Details** tab and enter the following information:



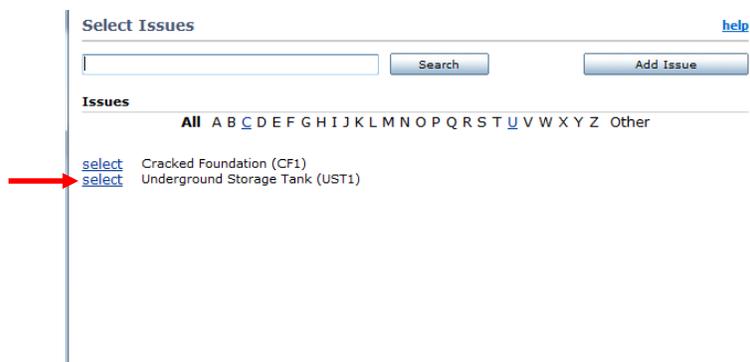
- **Items in Submittal** – Enter the **number of items** attached to the submittal.
- **Source** – Click the **select** button next to the field to select the name of the contact who produced the submittal items.
- **Filed by** – Click the **select** button next to the field to select the name of the contact who filed the submittal.

- **Filed Date** – Enter the **date** the submittal was filed by choosing the **calendar icon** next to the field.
- **Drawing** – Enter the **drawing number** associated with this submittal.
- **Code** – (optional) If desired, enter a **code** for this submittal. This information will allow you to identify this submittal using a code of your choosing.
- **Approved By** - Choose the **select** button next to the field to select the name of the contact who approved the submittal. Enter the **approval date** in the field provided by choosing the **calendar icon** next to the field.
- **Contract** – If desired, choose the **select** button next to the field to link a contract to this submittal. This should be the same contract that was previously selected on the Submittal Package.

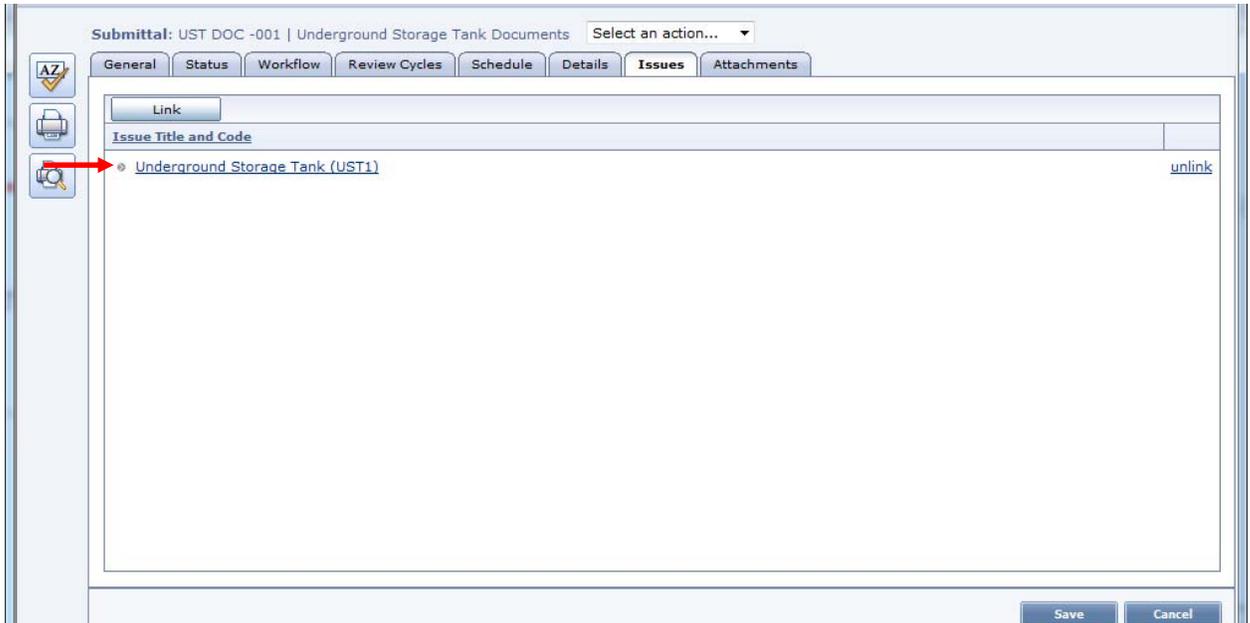
24. Click the **Issues** tab. If this Submittal should be linked to an Issue previously logged in the Issues log, choose the **Link** button to select the desired Issue.



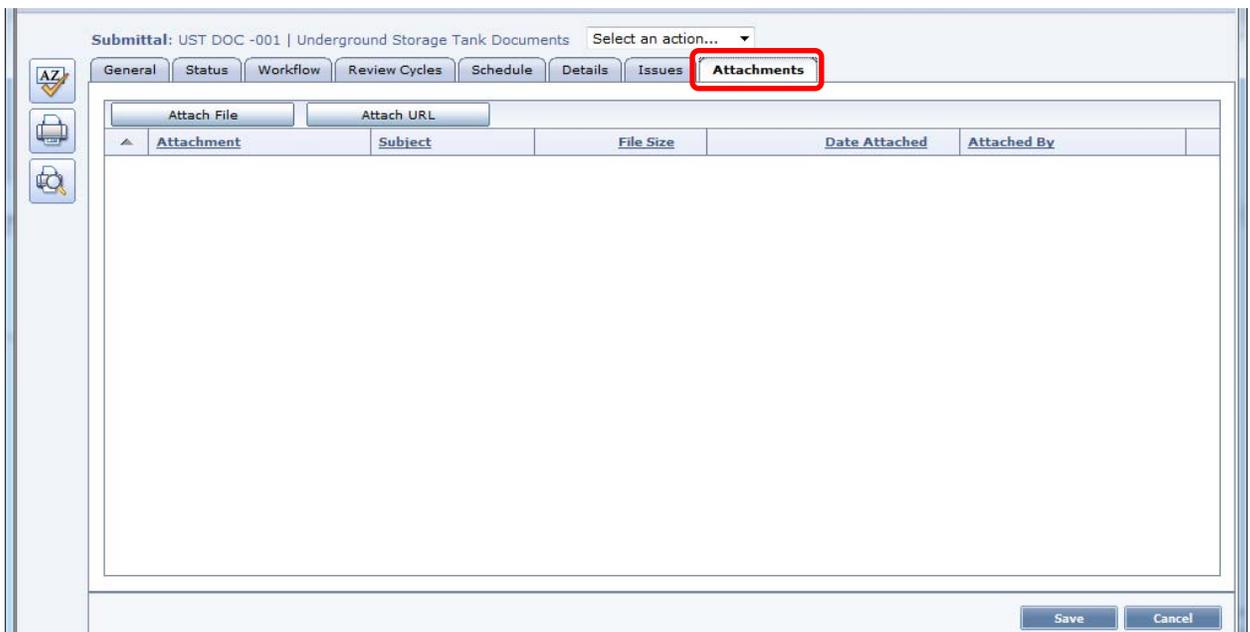
25. Choose the desired Issue by clicking the **select** link to the left of the Issue name.



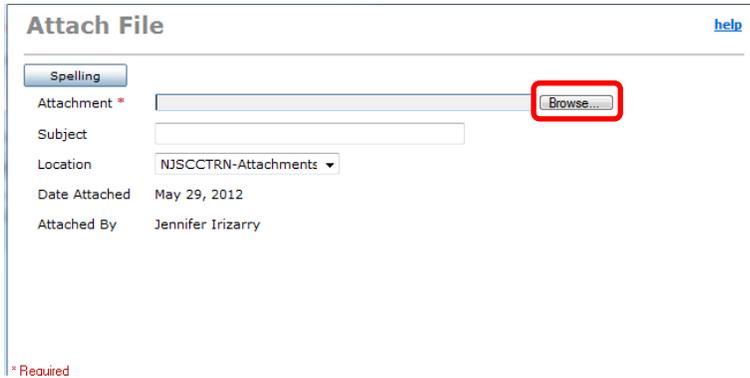
26. The selected Issue will display in the **Issues** tab.



27. Click the **Attachments** tab to attach any supporting documentation to this Submittal. Click the **Attach File** button. Remember, there may already be attachments to the Review Cycle and the Submittal Package.



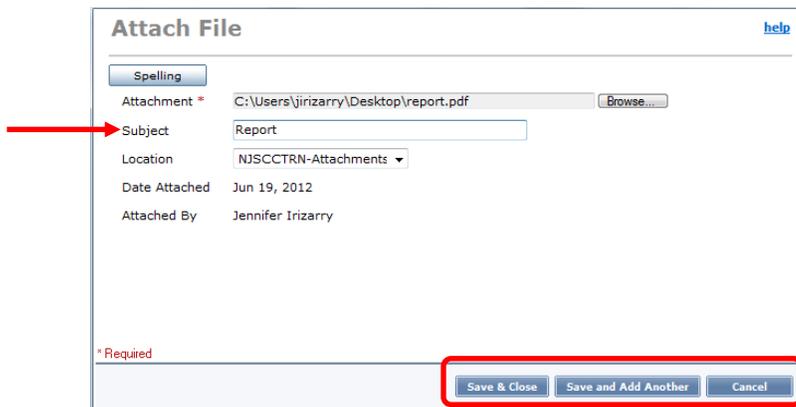
28. Click the **Browse** button to navigate to the document you wish to attach.



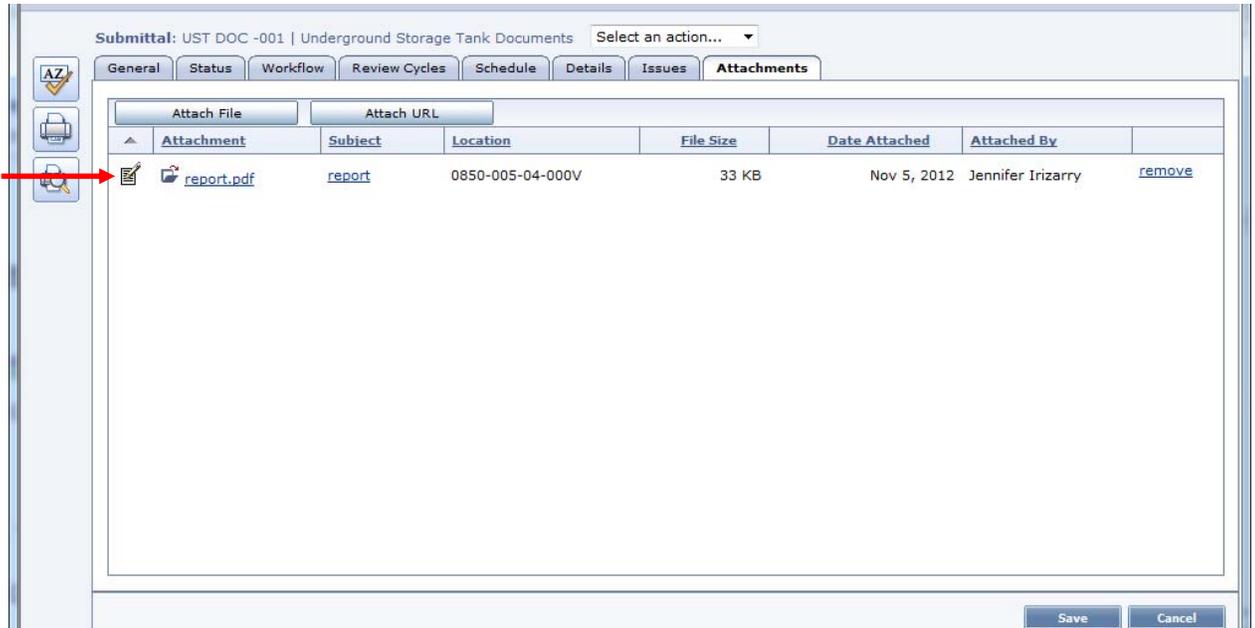
29. The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



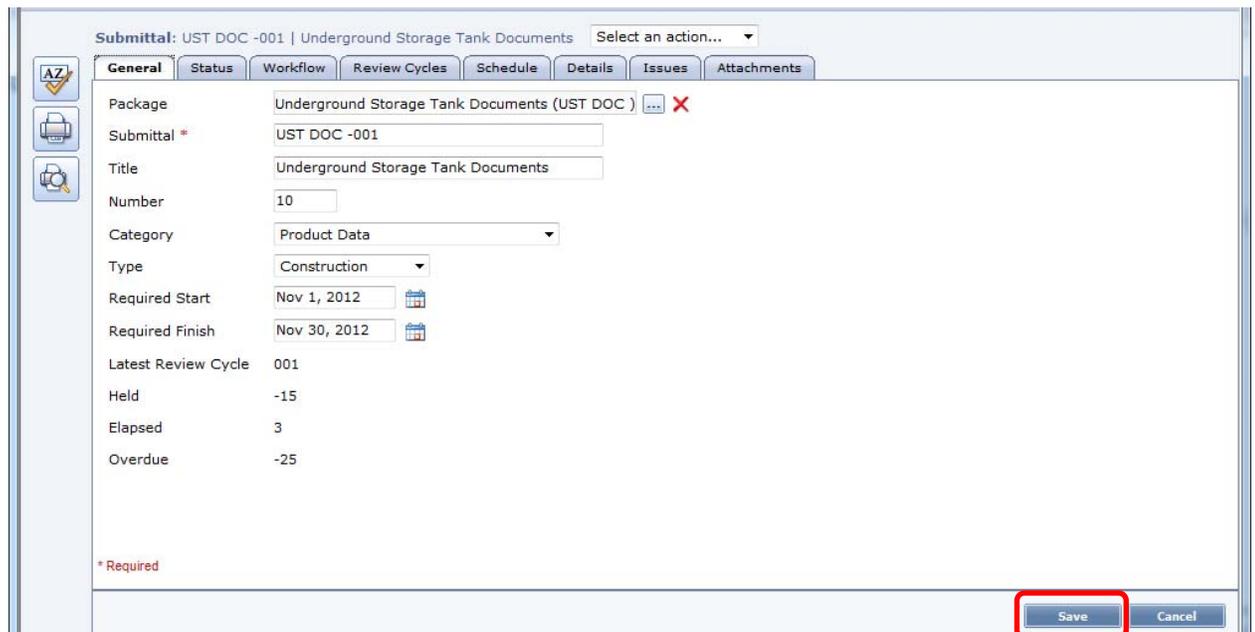
30. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



31. The attached file will display in the **Attachments** section.



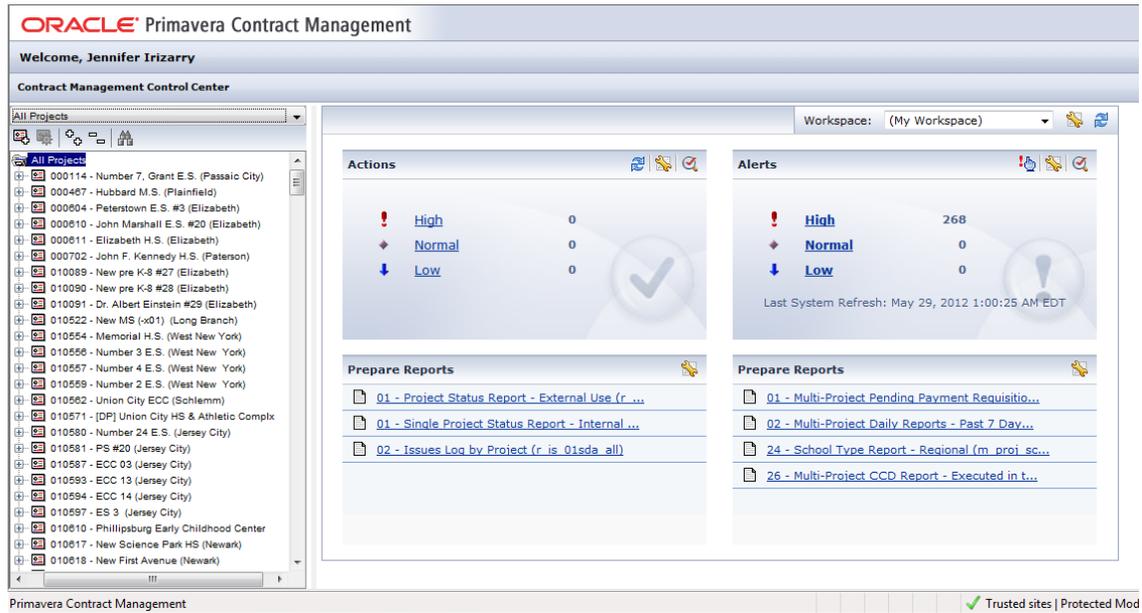
32. When all entries are completed, click the **Save** button at the bottom of the window.



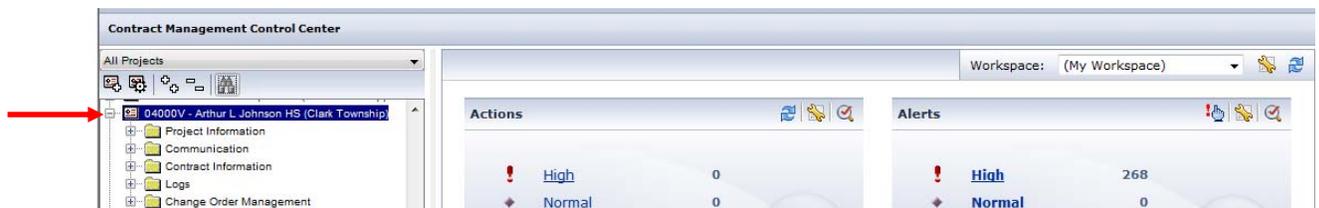
## V. Creating Submittal Packages with Multiple Submittals

It is recommended that you create Submittals from their associated Submittal packages so that the links between the two are properly established.

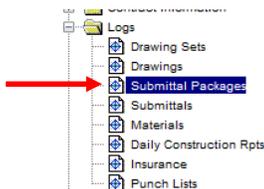
1. If necessary, find the applicable Submittal Package. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



3. Open the **Logs** folder (a list of subfolders will display) and select **Submittal Packages**.



- The **Submittal Package log** displays. Locate the desired Submittal Package from the log and click the **title (blue link)** to open the package.

Control Center > Submittal Packages

Submittal Packages Select an action... Find Layout: <my layout>

Title	Package	Total Items	Submitted	Approved	Unapproved	Received
<a href="#">Bidding &amp; Contract Award Phase</a>	BIDCON	0	0	0	0	0
<a href="#">Project Close Out Phase</a>	CLOSEOUT	0	0	0	0	0
<a href="#">Construction Administration Phase</a>	CONADMIN	0	0	0	0	0
<a href="#">Construction Document Phase</a>	CONST	0	0	0	0	0
<a href="#">Design Development Phase</a>	DESIGN	0	0	0	0	0
<a href="#">Post Occupancy Review Phase</a>	POSTOCC	0	0	0	0	0
<a href="#">Schematic Design Phase</a>	SCHEM	0	0	0	0	0
<a href="#">Underground Storage Tank Documents</a>	UST DOC	1	1	0	1	

- Click the **Submittals** tab and click the **Add Multiple Submittals** button to add multiple submittals.

Submittal Package: UST DOC | Underground Storage Tank Documents Select an action...

General Status Workflow Template **Submittals** Schedule SDA Data Issues Attachments Versions

[Add Multiple Submittals](#) [Update Package](#)

Submittals	Date Received	Date Sent	Date Returned	Status	Date Forwarded
<a href="#">Underground Storage Tank Documents (UST DOC-001)</a>	Nov 2, 2012	Nov 5, 2012	Nov 19, 2012	New Item	Nov 20, 2012

6. The **Add Multiple Submittals** dialog box displays.

- Enter number of submittals to add. This is a required field.
- Contract Management automatically assigns a starting submittal number. This means that each submittal created will have the same title with an incremented document number (-001, -002, etc.). Edit this starting number as desired or leave the default the system provides. This is a required field.
- Select **Yes** to link previously documented Issues to this document, or choose **No**.
- Click **Next** to continue.

https://dev2pe.njsda.gov/?from=\$SUB&to=\$SUB&wizardstart=1&packagekey=d73edc6e860044b9899cc6722a - Windows I...

### Add Multiple Submittals

How many new Submittals do you want to add to this package? \*

What is the starting Submittal Number? \*

Link the new Submittal to the same Issues as the original?

yes  no

\* Required

Next Cancel

7. Enter a title for each Submittal in the **Title** field.

**Add Multiple Submittals**

Enter Titles for the new Submittals

Submittal No.	Title	Category	Type
UST DOC -002	Drawing		
UST DOC -003	Report		

Previous Finish Cancel

8. Choose a category for each submittal by clicking the drop down list in the **Category** field.

**Add Multiple Submittals**

Enter Titles for the new Submittals

Submittal No.	Title	Category	Type
UST DOC -002	Drawing		
UST DOC -003	Report		

- Product Data
- Shop Drawing
- Mock Up
- Sample
- Certification
- As-Built
- Close-Out
- Warranty
- Test Report
- Operation/Maintenance Manual
- MSDS - Material Safety Data Sheets
- Lead

Previous Finish Cancel

9. Choose a type for each submittal by clicking the drop down list in the **Type** field

**Add Multiple Submittals**

Enter Titles for the new Submittals

Submittal No.	Title	Category	Type	
UST DOC -002	Drawing	Shop Drawing		ren
UST DOC -003	Report	Test Report		ren

Construction  
Post-Construction  
Pre-Construction

Previous Finish Cancel

10. Click the **Finish** button to create the Submittals.

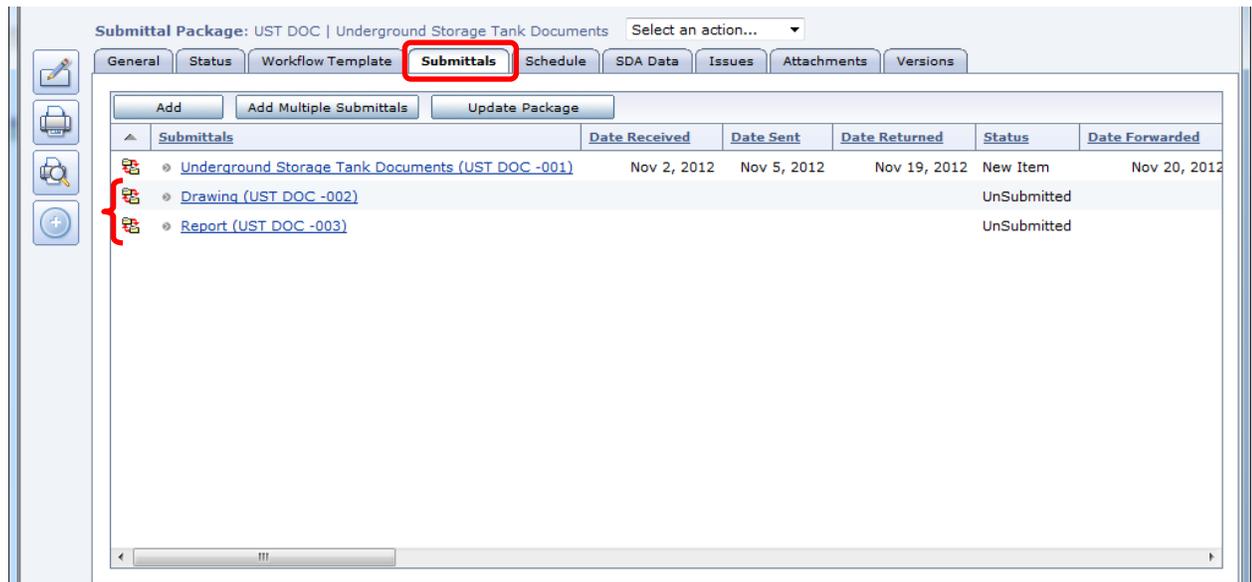
**Add Multiple Submittals**

Enter Titles for the new Submittals

Submittal No.	Title	Category	Type	
UST DOC -002	Drawing	Shop Drawing	Construction	ren
UST DOC -003	Report	Test Report	Construction	ren

Previous **Finish** Cancel

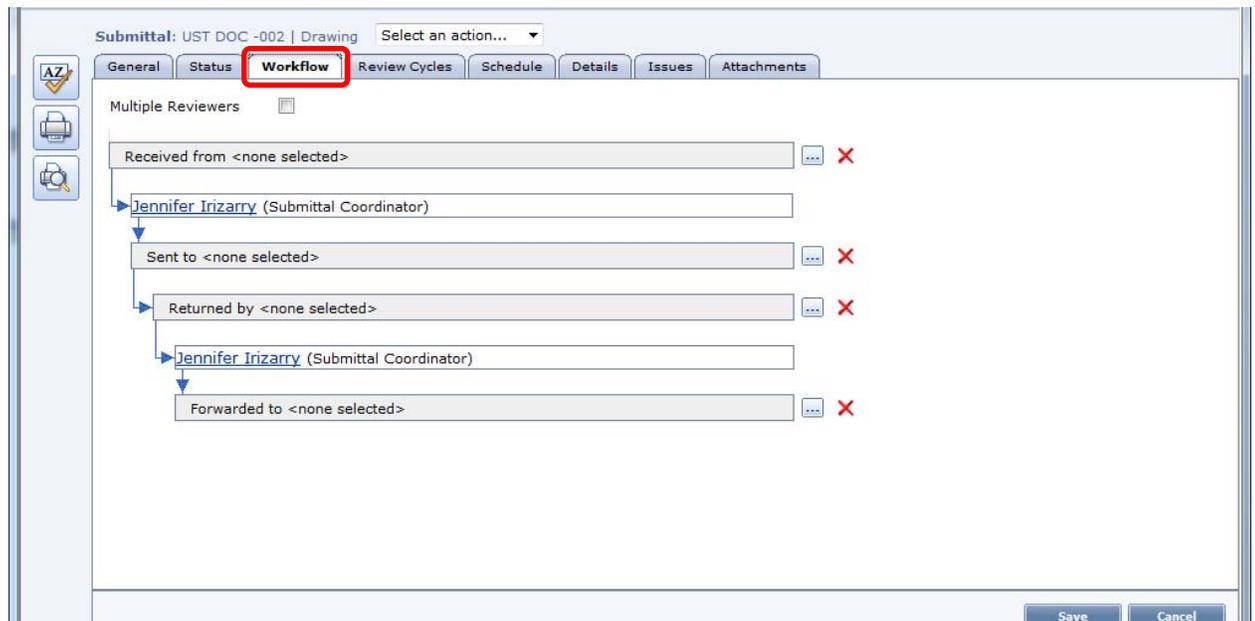
11. The individual submittals will be displayed in the **Submittals** tab. They can be opened by clicking on the blue link of the title name.



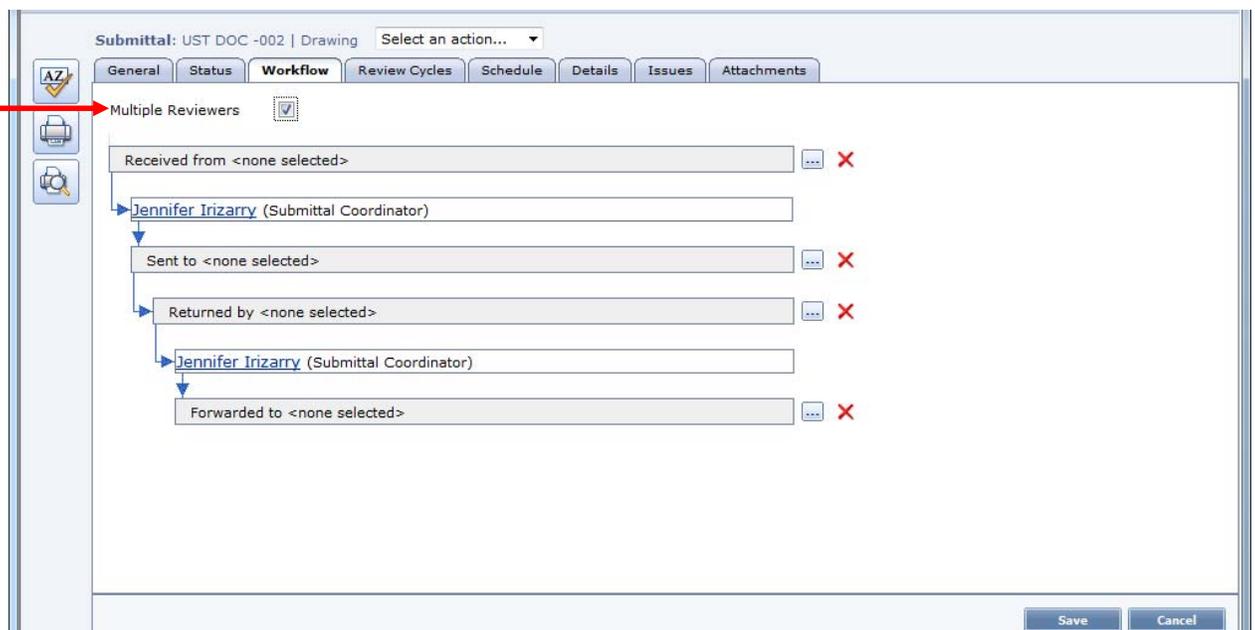
12. You can edit the individual submittals if necessary. Fields such as Start and Finish dates, etc., may be customized for each submittal using the previously described instructions.

## A. Populating the Workflow (Multiple Reviewers)

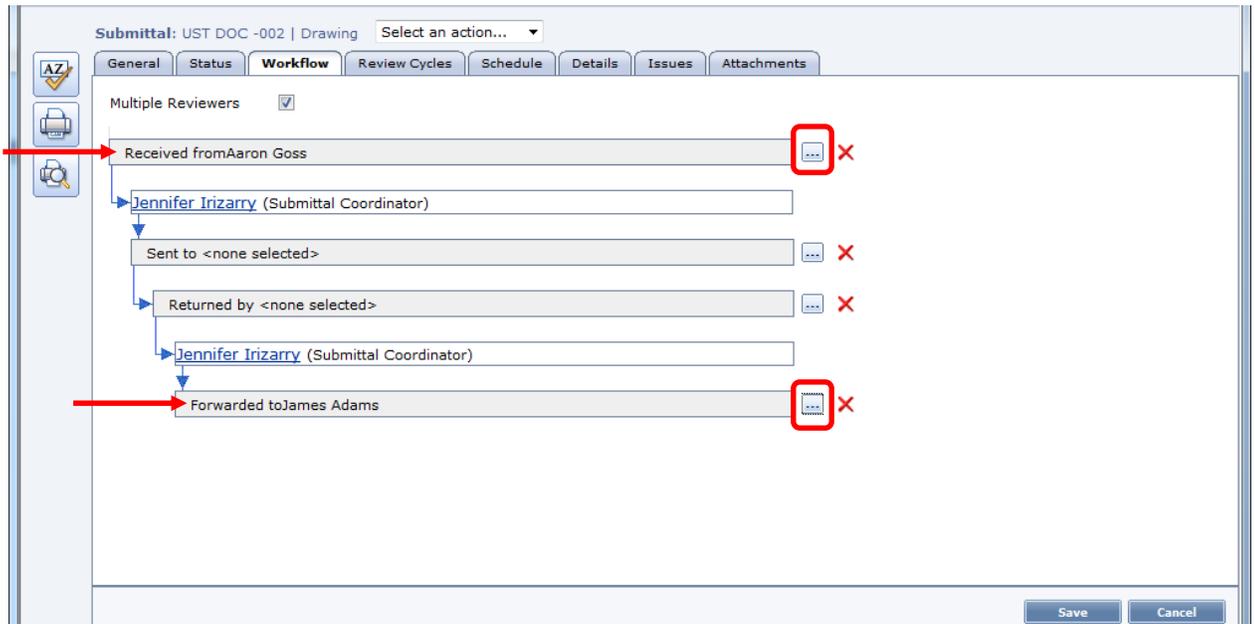
1. With a Submittal document open, click the **Workflow** tab. Some of the workflow information has been copied from the Package workflow.



2. To create a set of reviewers within a review cycle, click the **Multiple Reviewers** checkbox.



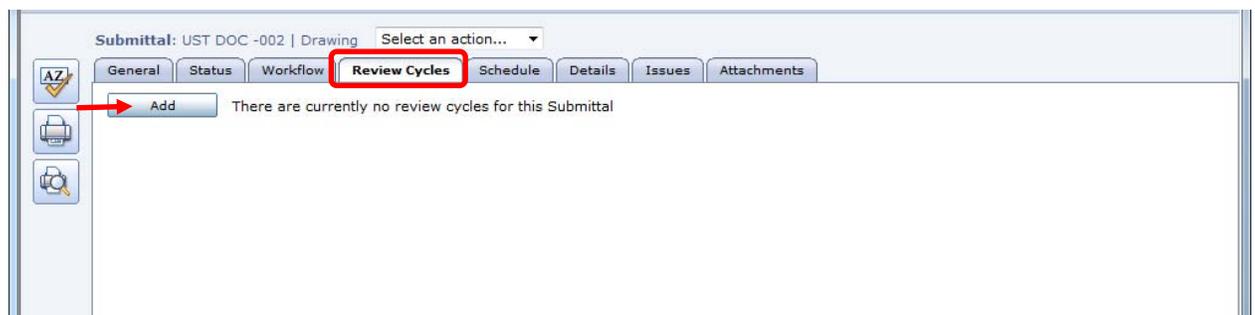
3. Select the **Received from** name by clicking the **select** button next to the field. Repeat the process with the **Forwarded to** name. The names for the **Sent to** and **Returned by** fields will be completed as the Multiple Reviewers are selected in the Review Cycle.



## B. Entering the First Review Cycle

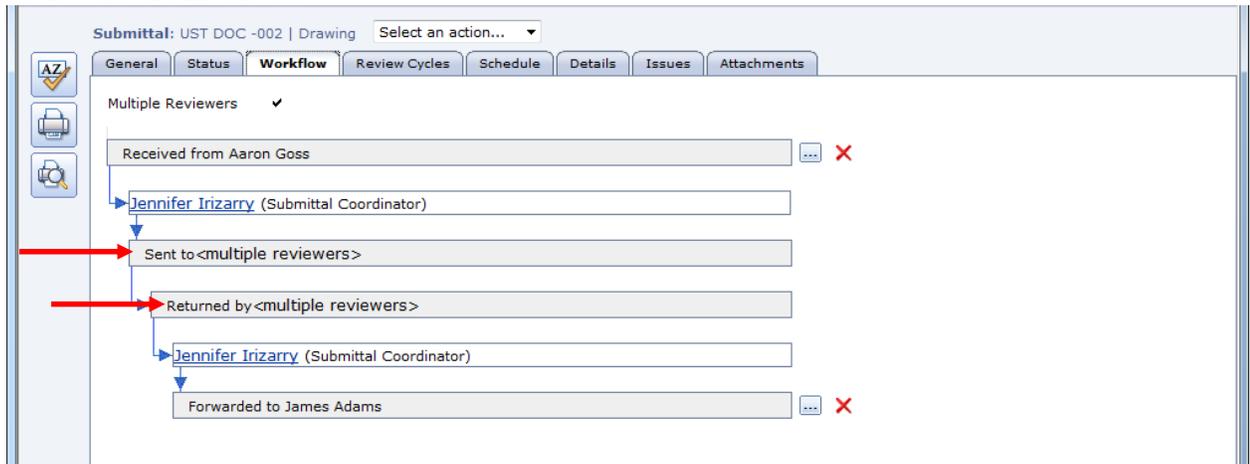
The Review Cycle section is where the specifics are tracked for each cycle of the submittal including the dates received, sent and the status. If the submittal is not approved, a new Review Cycle is created to track the next round. There is no limit to the number of Review Cycles per Submittal.

1. Click the **Review Cycles** tab and click the **Add** button to create a review cycle.

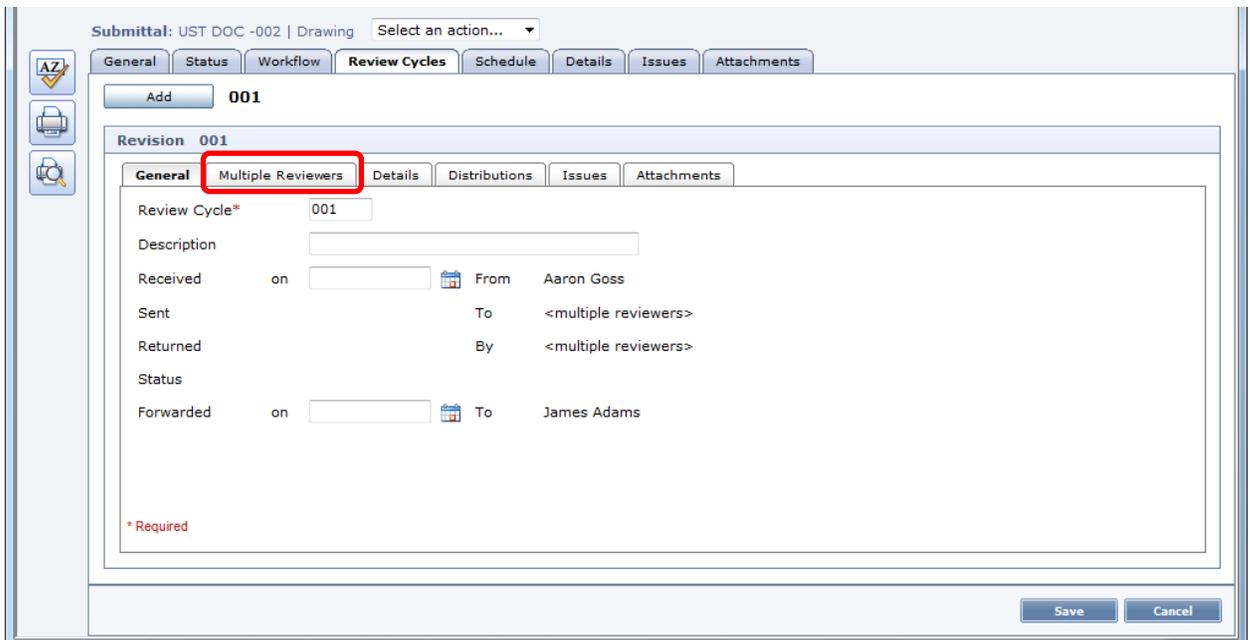


2. Once the Add button is clicked, you will notice that several fields within the Submittal document have been updated:

- The **Sent To** and **Returned By** fields in the **Workflow** tab now indicate that multiple reviewers are involved.



- A sub-tab called **Multiple Reviewers** displays in the **Review Cycles** tab.



- Under the General sub-tab, the first review cycle will display numbered **001** in the **Review Cycle\*** field. Enter a brief description of the review cycle in the **Description** field, such as Initial Review, as shown in the example below.

Submittal: UST DOC -002 | Drawing Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

**General** Multiple Reviewers Details Distributions Issues Attachments

Review Cycle\* 001

Description Initial Review

Received on [ ] From Aaron Goss

Sent To <multiple reviewers>

Returned By <multiple reviewers>

Status

Forwarded on [ ] To James Adams

\* Required

Save Cancel

- Complete the **date fields** as the document is received from the Contractor or internal reviewer, and as it is passed from party to party for review. Notice that some of the names have already been loaded from the Workflow section. The first date in the **Received** field represents the date that the submittal was received from the Contractor or internal reviewer. When this date is entered, the Ball in Court will be set to the Submittal Coordinator.

Submittal: UST DOC -002 | Drawing Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

**General** Multiple Reviewers Details Distributions Issues Attachments

Review Cycle\* 001

Description Initial Review

Received on **Nov 1, 2012** From Aaron Goss

Sent To <multiple reviewers>

Returned By <multiple reviewers>

Status

Forwarded on [ ] To James Adams

\* Required

Save Cancel

- The information in the **Sent** and **Received** fields will be populated when the names for the multiple reviewers have been chosen in the **Multiple Reviewers** sub-tab.

Submittal: UST DOC -002 | Drawing Select an action...  
General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Multiple Reviewers Details Distributions Issues Attachments

Review Cycle\* 001  
Description Initial Review  
Received on Nov 1, 2012 From Aaron Goss  
**Sent To <multiple reviewers>**  
**Returned By <multiple reviewers>**  
Status  
Forwarded on To James Adams

\* Required

Save Cancel

- Click the **Multiple Reviewers** sub-tab and click the **Add** button.

Submittal: UST DOC -002 | Drawing Select an action...  
General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General **Multiple Reviewers** Details Distributions Issues Attachments

Add

Reviewer	Sent	Returned	Status	Number	Held	Elapsed
----------	------	----------	--------	--------	------	---------

Save Cancel

7. In the dialog box, choose the first **Reviewer's** name by clicking the **select** button next to the field.

Revision Set

Spelling

Reviewer: <none selected> [select]

Date Sent: [calendar icon]

Date Returned: [calendar icon]

Status: New Item

Number: 1

Held: 0

Elapsed: 0

Description: [text box]

Remarks: [text area]

Drawing Date: [calendar icon]

Reviewer No.: [text box]

Reviewer Status: [dropdown]

Save and Close Save and Add Another Cancel

8. Enter the date you sent this submittal to the reviewer in the **Date Sent** field. The **Date Returned** will be completed with the reviewed submittal is returned to you.

Revision Set

Spelling

Reviewer: New Jersey Schools Development Auth Claire Tsai-Ochs [select]

Date Sent: Nov 2, 2012 [calendar icon]

Date Returned: [calendar icon]

Status: New Item

Number: 1

Held: 0

Elapsed: 0

Description: [text box]

Remarks: [text area]

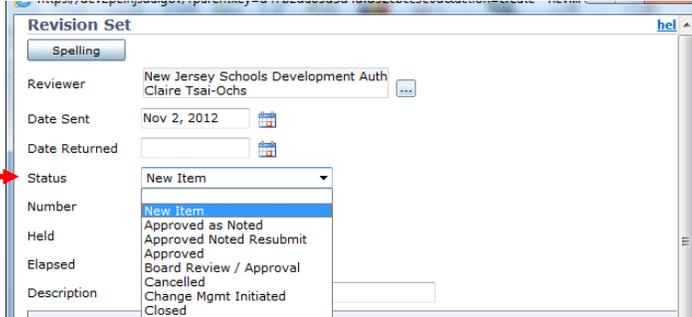
Drawing Date: [calendar icon]

Reviewer No.: [text box]

Reviewer Status: [dropdown]

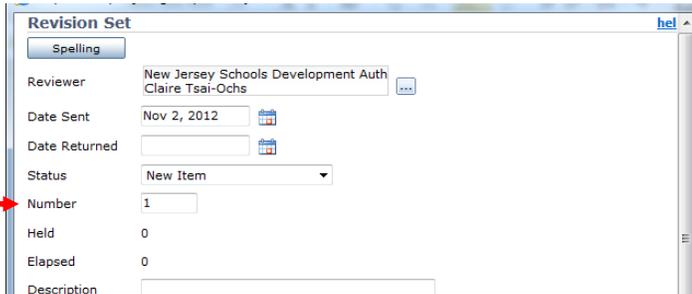
Save and Close Save and Add Another Cancel

9. Select the current **Status** of the submittal by choosing an option from the drop down list.



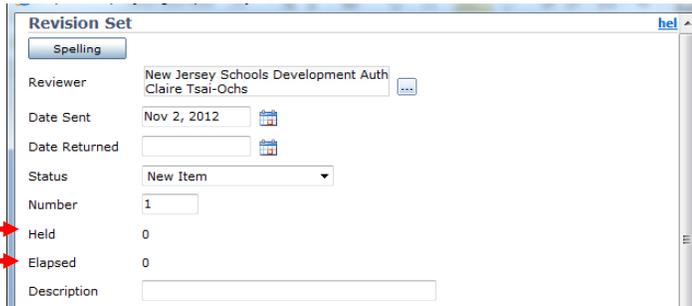
The screenshot shows the 'Revision Set' form with the 'Status' dropdown menu open. A red arrow points to the 'Status' field. The dropdown menu lists the following options: 'New Item', 'New Item', 'Approved as Noted', 'Approved Noted Resubmit', 'Approved', 'Board Review / Approval', 'Cancelled', 'Change Mgmt Initiated', and 'Closed'. The 'New Item' option is currently selected.

10. The **Number** field will increment as subsequent reviewer names are added. Do not edit this field.



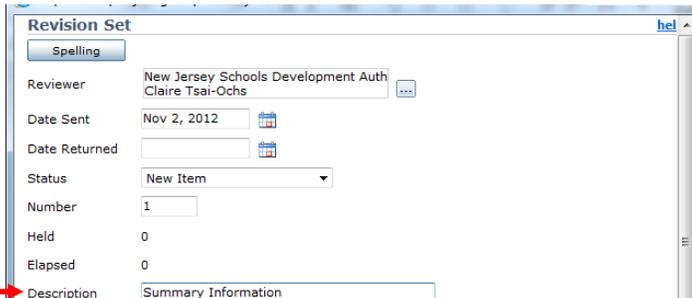
The screenshot shows the 'Revision Set' form with the 'Number' field highlighted by a red arrow. The 'Number' field contains the value '1'. Other fields include 'Reviewer' (New Jersey Schools Development Auth Claire Tsai-Ochs), 'Date Sent' (Nov 2, 2012), 'Date Returned', 'Status' (New Item), 'Held' (0), 'Elapsed' (0), and 'Description'.

11. The **Held** field shows the difference between “today” and the last status date for this review cycle. It will initially display zero. The **Elapsed** field will show the number of days the submittal has been open for this review cycle. Both of these fields will be automatically calculated by the system.



The screenshot shows the 'Revision Set' form with the 'Held' and 'Elapsed' fields highlighted by red arrows. Both fields contain the value '0'. Other fields include 'Reviewer' (New Jersey Schools Development Auth Claire Tsai-Ochs), 'Date Sent' (Nov 2, 2012), 'Date Returned', 'Status' (New Item), 'Number' (1), and 'Description'.

12. Enter a short **Description** of the submittal to be reviewed (29 character limit).



The screenshot shows the 'Revision Set' form with the 'Description' field highlighted by a red arrow. The 'Description' field contains the text 'Summary Information'. Other fields include 'Reviewer' (New Jersey Schools Development Auth Claire Tsai-Ochs), 'Date Sent' (Nov 2, 2012), 'Date Returned', 'Status' (New Item), 'Number' (1), 'Held' (0), and 'Elapsed' (0).

13. Enter any applicable remarks for the reviewer in the **Remarks** field.

The screenshot shows the 'Revision Set' dialog box with the 'Spelling' tab selected. The 'Remarks' field is highlighted with a red arrow. The field contains the text 'Please review and advise'. The 'Description' field contains 'Summary Information'. The 'Date Sent' is 'Nov 2, 2012'. The 'Reviewer' is 'New Jersey Schools Development Auth Claire Tsai-Ochs'. The 'Status' is 'New Item'. The 'Number' is '1'. The 'Held' and 'Elapsed' values are '0'. The 'Drawing Date' and 'Reviewer No.' fields are empty. The 'Save and Close', 'Save and Add Another', and 'Cancel' buttons are visible at the bottom.

14. (Optional) If this submittal is associated with a drawing, enter the applicable **Drawing Date**.

The screenshot shows the 'Revision Set' dialog box with the 'Spelling' tab selected. The 'Drawing Date' field is highlighted with a red arrow. The 'Remarks' field contains 'Please review and advise'. The 'Description' field contains 'Summary Information'. The 'Date Sent' is 'Nov 2, 2012'. The 'Reviewer' is 'New Jersey Schools Development Auth Claire Tsai-Ochs'. The 'Status' is 'New Item'. The 'Number' is '1'. The 'Held' and 'Elapsed' values are '0'. The 'Reviewer No.' field is empty. The 'Save and Close', 'Save and Add Another', and 'Cancel' buttons are visible at the bottom.

15. (Optional) If desired, enter the document number this reviewer assigned to the submittal in the **Reviewer No.** field. For example, if the reviewer had a log listing the number of submittals they processed, the reviewer may want to add the log number they assigned to this submittal.

The screenshot shows a web-based form titled "Revision Set". The form includes several fields: "Reviewer" (New Jersey Schools Development Auth, Claire Tsai-Ochs), "Date Sent" (Nov 2, 2012), "Date Returned", "Status" (New Item), "Number" (1), "Held" (0), "Elapsed" (0), and "Description" (Summary Information). Below these is a "Remarks" section with the text "Please review and advise". At the bottom, there are fields for "Drawing Date" and "Reviewer No.", with a red arrow pointing to the "Reviewer No." field. The form also has "Save and Close", "Save and Add Another", and "Cancel" buttons.

16. (Optional) If desired, enter the reviewer's status in the **Reviewer Status** field using the drop down box to make a selection. **Note:** The **Reviewer Status** field is separate from the **Status** field. The overall status of the review still needs to be updated in the Status field.

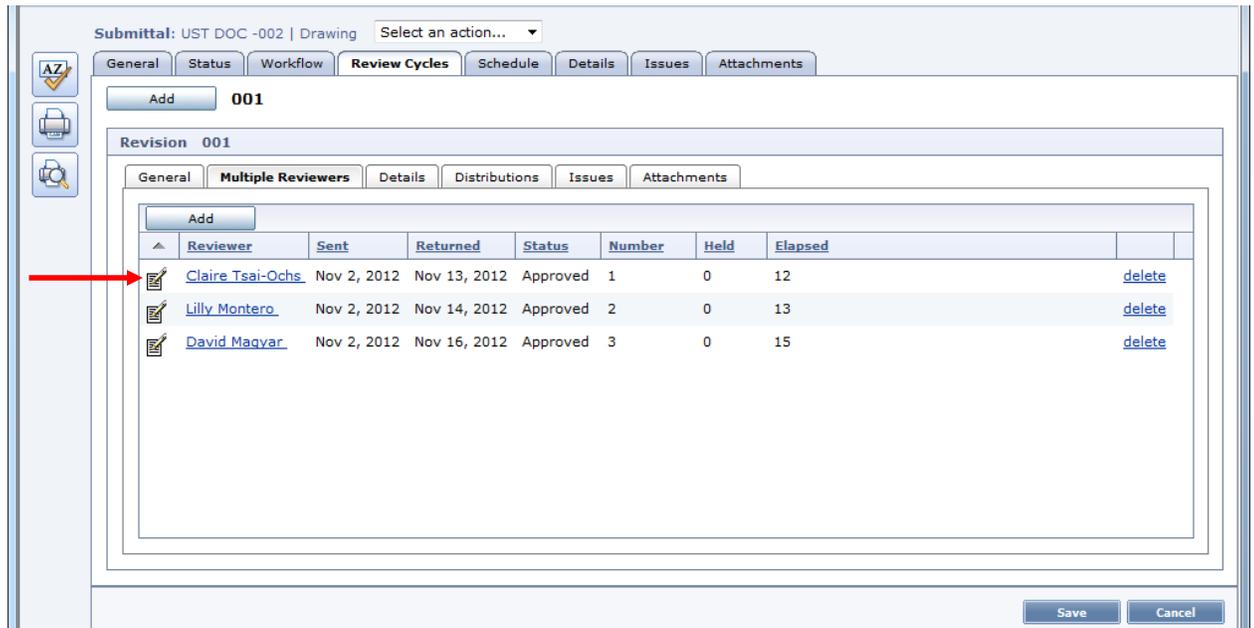
This screenshot is similar to the previous one but includes an additional field, "Reviewer Status", which is a dropdown menu. A red arrow points to this field. The "Status" field is also highlighted with a red arrow. The form contains the same fields as the previous screenshot, including "Reviewer", "Date Sent", "Date Returned", "Status", "Number", "Held", "Elapsed", "Description", "Remarks", "Drawing Date", and "Reviewer No.". The "Save and Close", "Save and Add Another", and "Cancel" buttons are also present.

17. Scroll to the bottom of the dialog box and click the **Save and Add Another** button to add additional reviewer names or click the **Save and Close** button to return to the submittal.

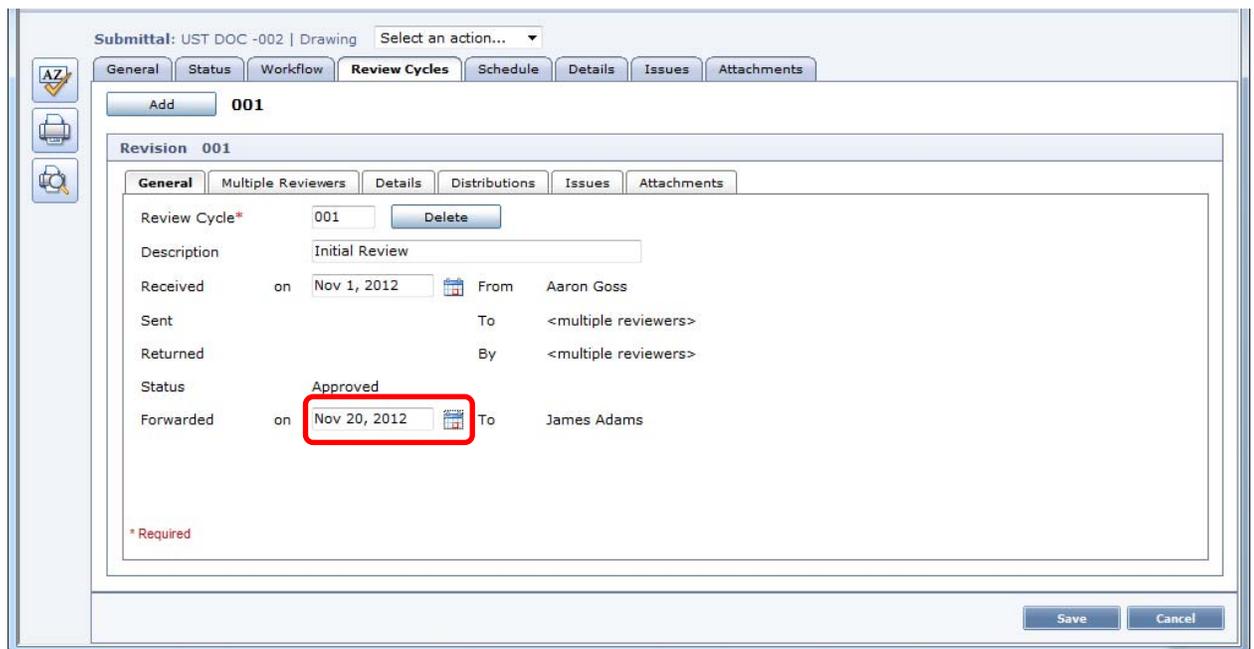
18. In the example shown below, two additional names have been added to the review cycle.

Reviewer	Sent	Returned	Status	Number	Held	Elapsed	
<a href="#">Claire Tsai-Ochs</a>	Nov 2, 2012		New Item	1	3	4	<a href="#">delete</a>
<a href="#">Lilly Montero</a>	Nov 2, 2012		New Item	2	3	4	<a href="#">delete</a>
<a href="#">David Maqyar, BIC</a>	Nov 2, 2012		New Item	3	3	4	<a href="#">delete</a>

19. The **Status** field associated with each reviewer must be updated as their review is complete. Click the edit icon by the desired reviewer. Enter the Returned date, and change the status as required.



20. Under the General sub-tab, the fourth date in the **Forwarded** field represents the date that the Submittal Coordinator returned the submittal to the applicable party. When this date is entered, the Ball in Court will be set to the applicable party (either a Contractor or an internal reviewer).



21. Click the **Details** sub-tab. If applicable, enter the number of **Sepias** and **Prints**, enter a **Drawing Date**, and include any required comments in the **Remarks** section.

Submittal: UST DOC -002 | Drawing Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Multiple Reviewers **Details** Distributions Issues Attachments

Sepias 0 Held 0

Prints 0 Elapsed 15

Drawing Date

Remarks

Save Cancel

22. Click the **Distributions** sub-tab. Click the **Add** button to add contacts who should receive a copy of the submittal.

Submittal: UST DOC -002 | Drawing Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Multiple Reviewers Details **Distributions** Issues Attachments

Add

▲	Distributed to	Date	Copies	Remarks	Transmit
---	----------------	------	--------	---------	----------

Save Cancel

23. The **Distribute Submittal** dialog box displays. Click the **Select** button to choose the applicable names from the contact list.

**Important:** *If you want to generate a Transmittal, you must add names to the Distribution section.*

**Distribute Submittal** [help](#)

Review Cycle 001

Copies

Remarks

Distribute to these contacts

**Select**

Transmit	Distributed to
----------	----------------

24. Enter the number of copies in the **Copies** field and any desired remarks in the **Remarks** field. Click the **Save** button when completed.

<https://dev2pe.njsda.gov/?masterkey=98c188e1de1d49faa31ebdc13b&from=TRD&to=TRD...> [help](#)

Review Cycle 001

Copies 1

Remarks For your review

Distribute to these contacts

**Select**

Transmit	Distributed to
<input checked="" type="checkbox"/>	Andrew Yosha (New Jersey Schools Development Auth) <a href="#">Unselect</a>

25. The contacts you have chosen will display in the **Distributions** sub-tab. A pending Transmittal (cover sheet) will be added to the **Transmittal queue** for each contact added to the Distributions list. From the Transmittal queue, you can create or print the transmittals. Section XI of this document will provide instructions on printing Transmittals for distribution.

The screenshot shows the 'Distributions' sub-tab of the 'Revision 001' window. The window title is 'Submittal: UST DOC -002 | Drawing' and it has a 'Select an action...' dropdown. The 'Distributions' sub-tab is active, showing a table with the following data:

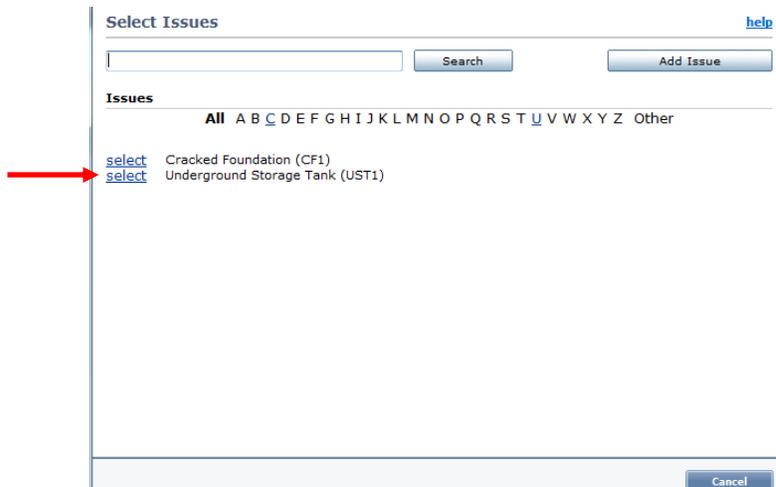
Distributed to	Date	Copies	Remarks	Transmit	
Andrew Yosha	Nov 5, 2012	1	For your review	✓	<a href="#">delete</a>

Buttons for 'Add', 'Save', and 'Cancel' are visible.

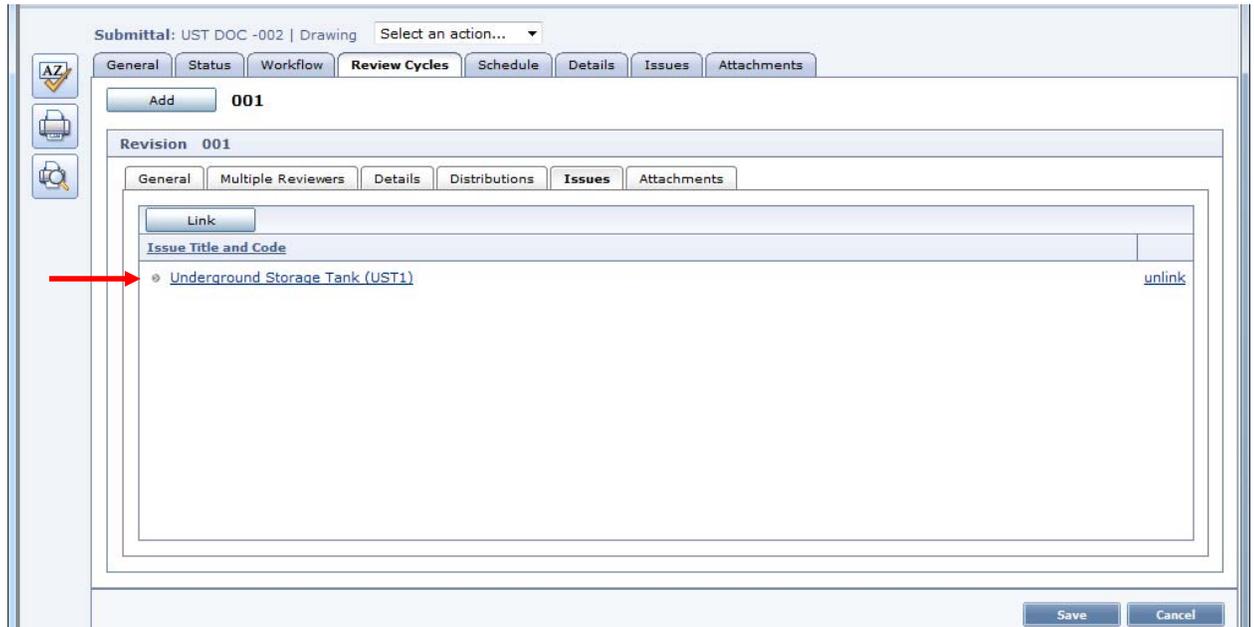
26. Click the **Issues** sub-tab. If this review cycle should be linked to an Issue previously logged in the Issues log, choose the **Link** button to select the desired Issue. **Note:** Issues can also be linked at the submittal document level.

The screenshot shows the 'Issues' sub-tab of the 'Revision 001' window. The 'Issues' sub-tab is highlighted with a red box. The window title is 'Submittal: UST DOC -002 | Drawing' and it has a 'Select an action...' dropdown. The 'Issues' sub-tab is active, showing a 'Link' button and a text input field labeled 'Issue Title and Code'. Buttons for 'Save' and 'Cancel' are visible.

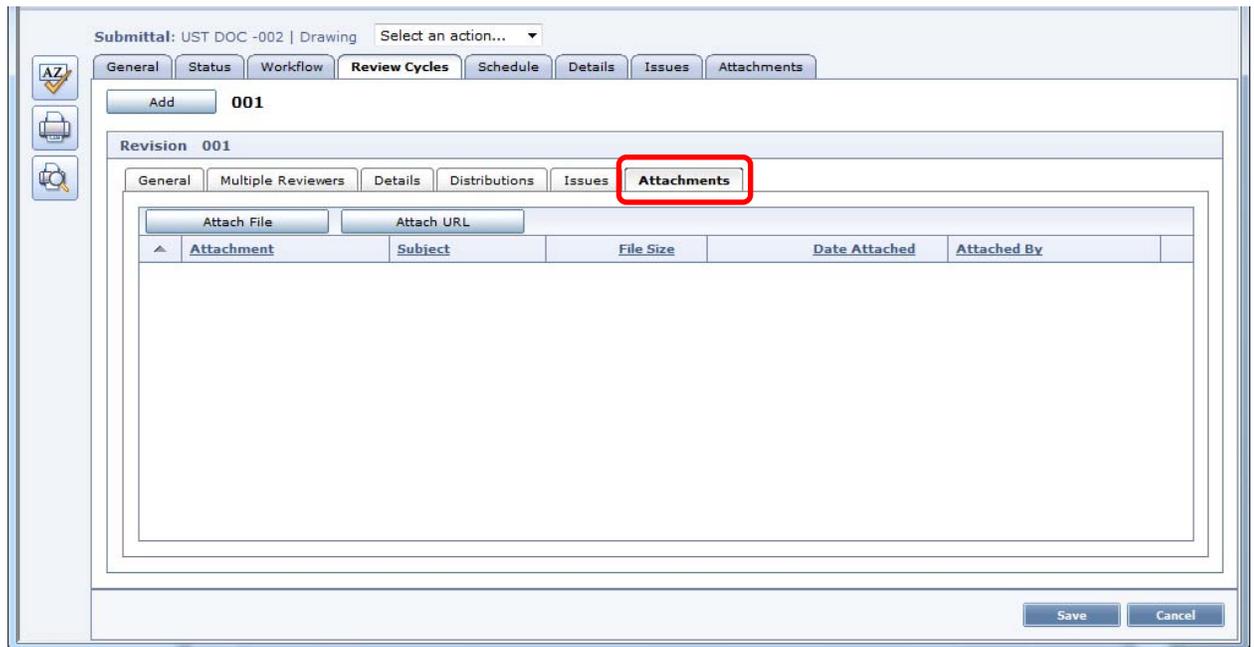
27. Choose the desired Issue by clicking the **select** link to the left of the Issue name.



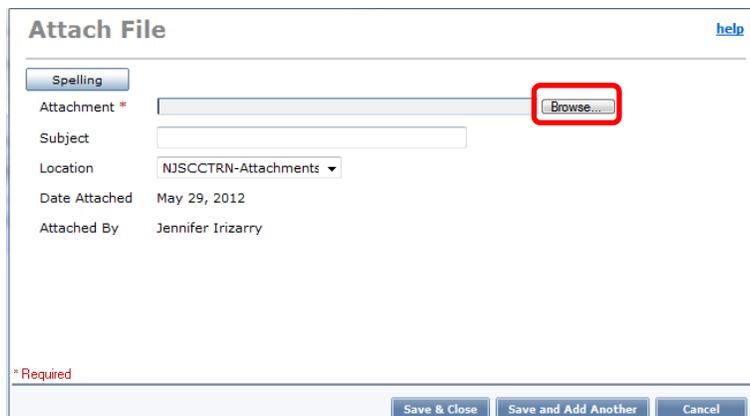
28. The selected Issue will display in the Issues sub-tab.



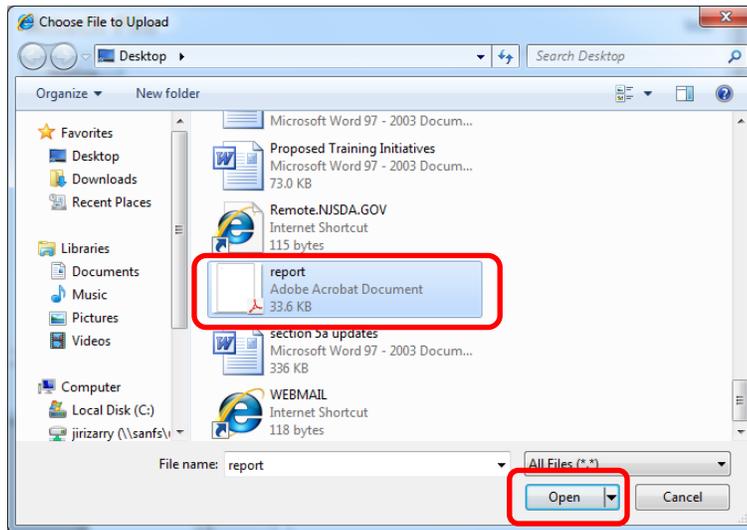
29. Click the **Attachments** sub-tab to attach any supporting documentation to this review cycle. Click the **Attach File** button. Note: Attachments can also be linked at the submittal document level.



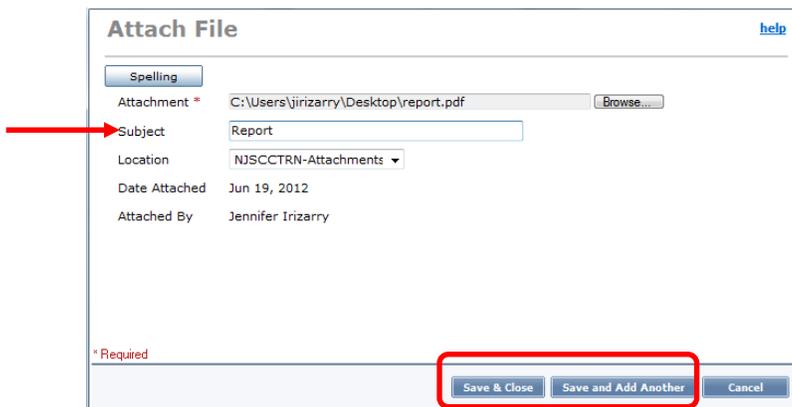
30. Click the **Browse** button to navigate to the document you wish to attach.



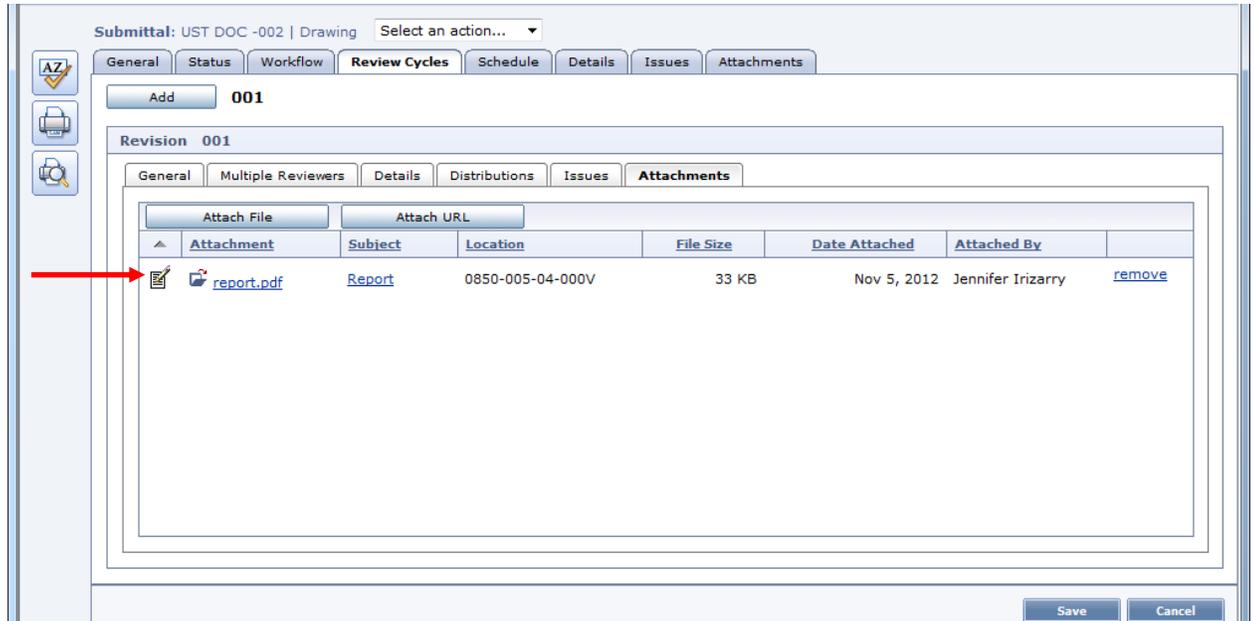
31. The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



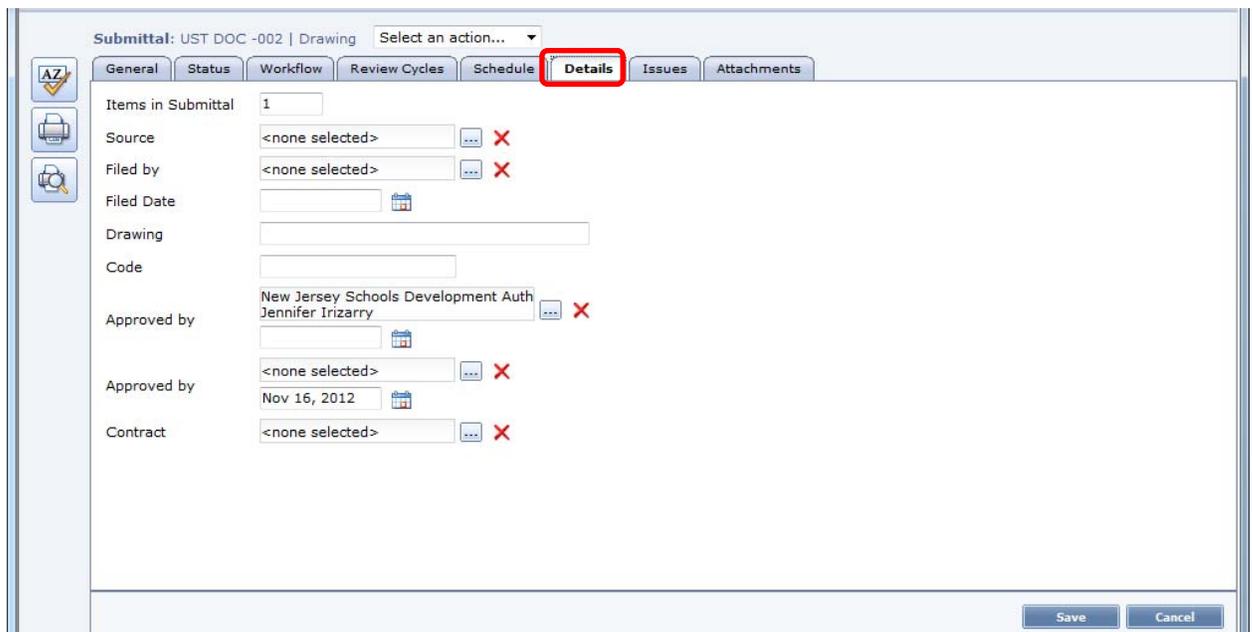
32. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close** to return to the submittal. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



33. The attached file will display in the **Attachments** sub-tab.



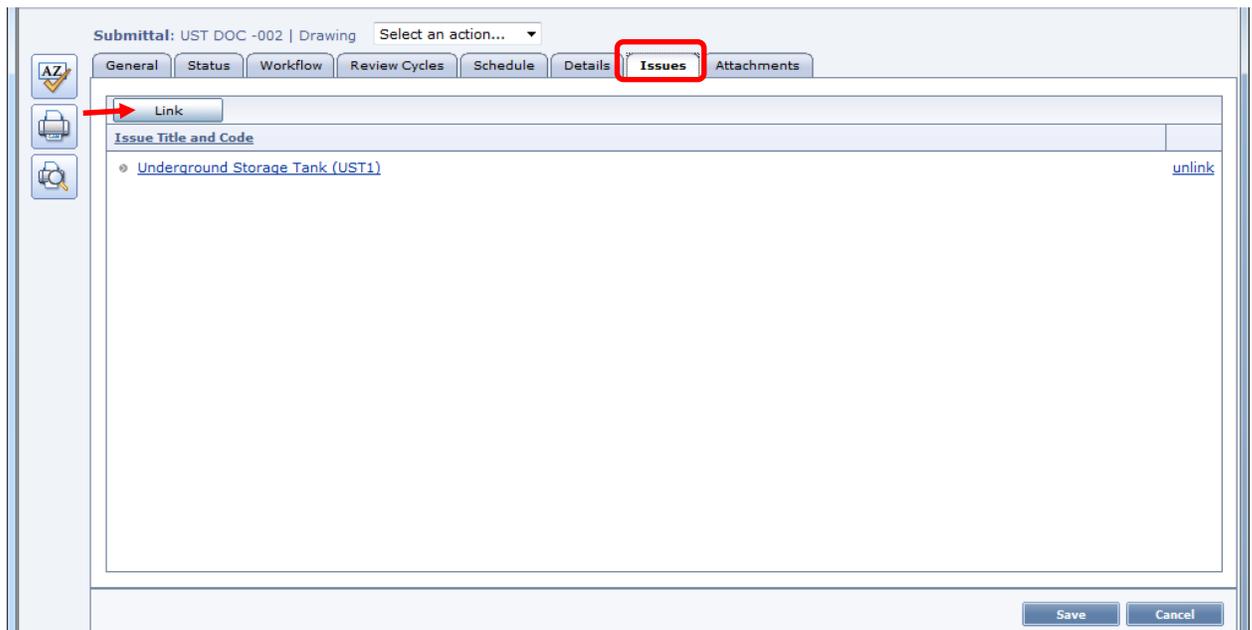
34. To complete the entry of the submittal, click the **Details** tab of the document and enter the following information:



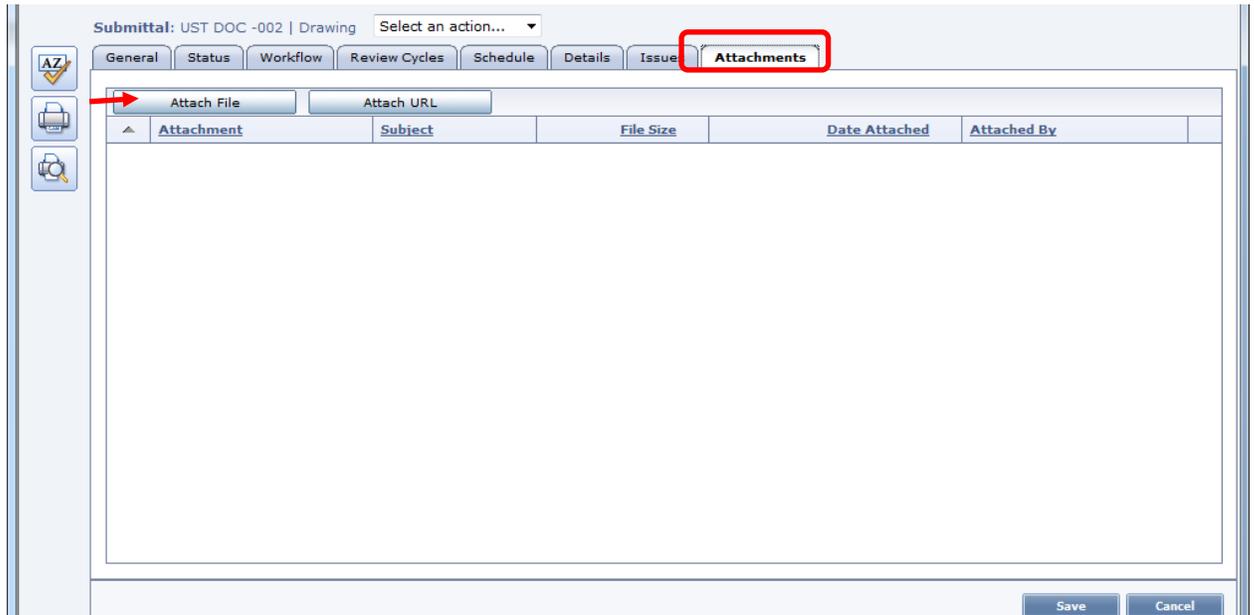
- **Items in Submittal** – Enter the **number of items** attached to the submittal.
- **Source** – Choose the **select** button next to the field to open the **Select Contact** dialog box to select the name of the contact who produced the submittal items.

- **Filed by** – Choose the **select** link next to the field to open the **Select Contact** dialog box to select the name of the contact who filed the submittal.
- **Filed Date** – Enter the **date** the submittal was filed by choosing the **calendar icon** next to the field.
- **Drawing** – Enter the **drawing number** associated with this submittal.
- **Code** – (optional) If desired, enter a **code** for this submittal. This information will allow you to identify this submittal using a code of your choosing.
- **Approved By** - Choose the **select** button next to the field to select the name of the contact who approved the submittal. Enter the **approval date** in the field provided by choosing the **calendar icon** next to the field.
- **Contract** – If desired, choose the **select** button next to the field to link a contract to this submittal. This should be the same contract that was previously selected on the Submittal Package.

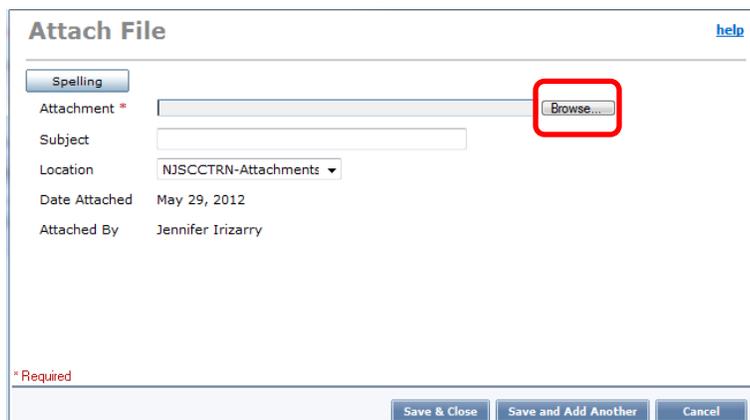
35. Click the **Issues** tab. When this submittal was generated, the option to link the previously chosen Issues was selected, therefore, an Issue displays in the window. Click the **Link** button to choose additional Issues to link to this submittal.



36. Click the **Attachments** tab to attach any supporting documentation to this Submittal. Click the **Attach File** button. Remember, there may already be attachments to the Review Cycle and the Submittal Package.



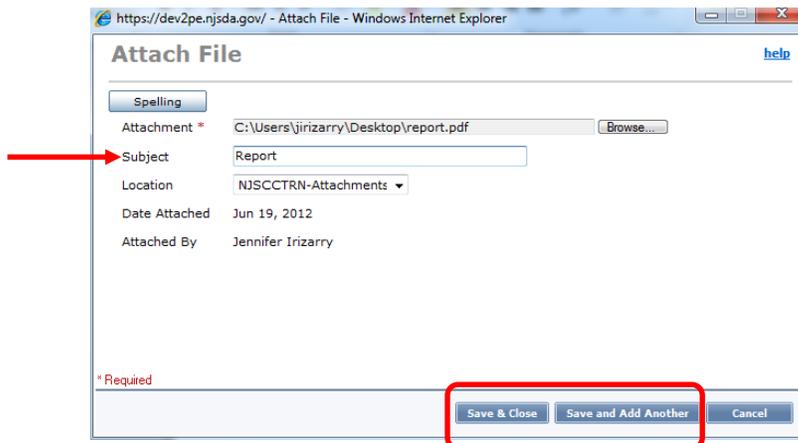
37. Click the **Browse** button to navigate to the document you wish to attach.



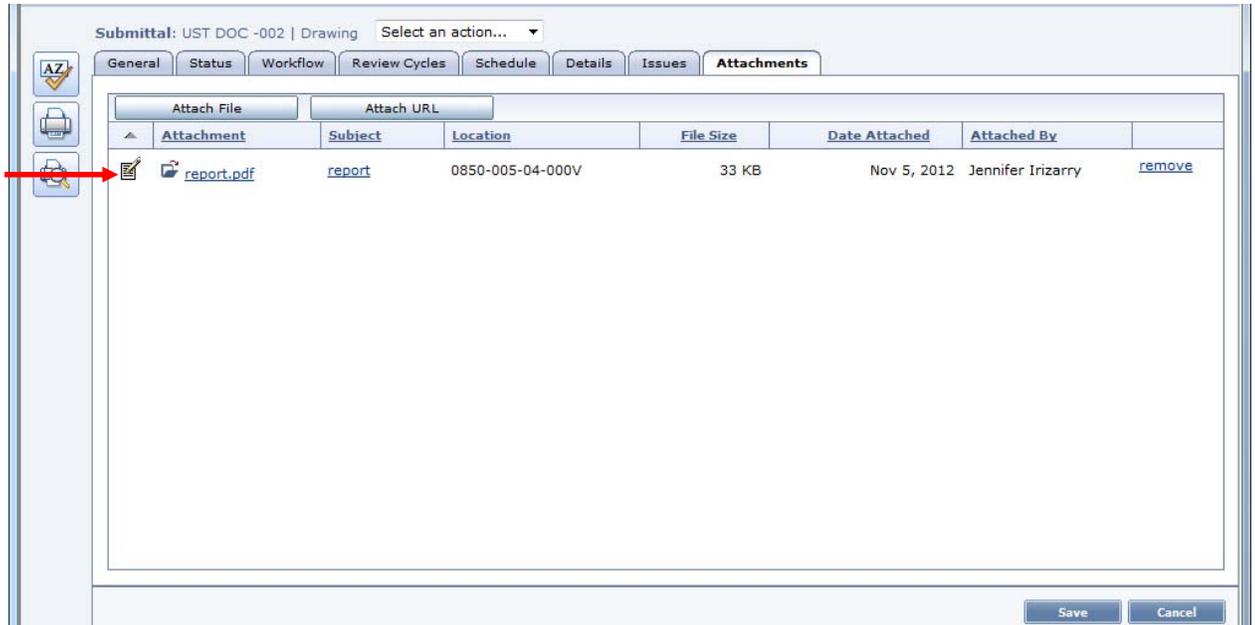
38. The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



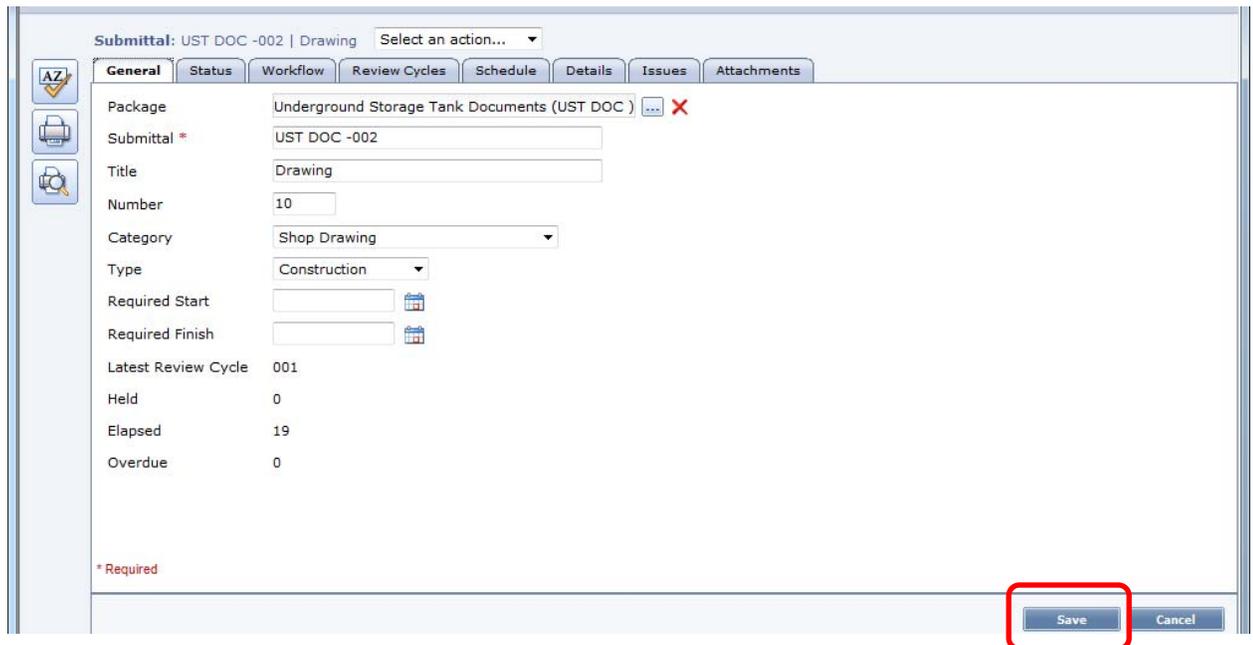
39. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



43. The attached file will display in the **Attachments** section.



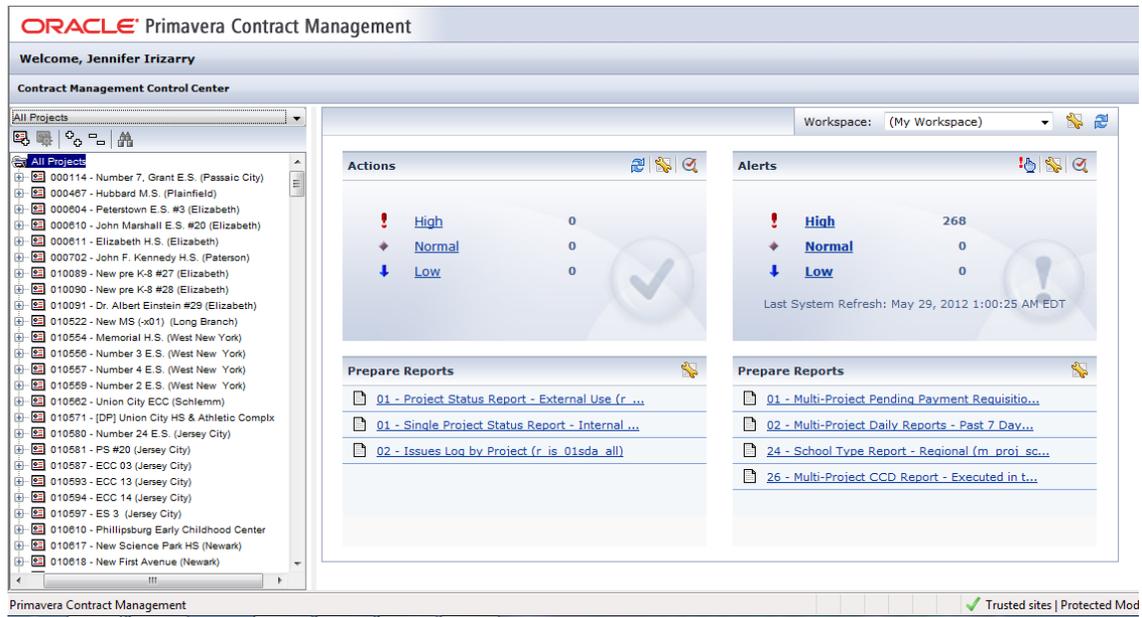
44. When all entries are completed, click the **Save** button at the bottom of the window.



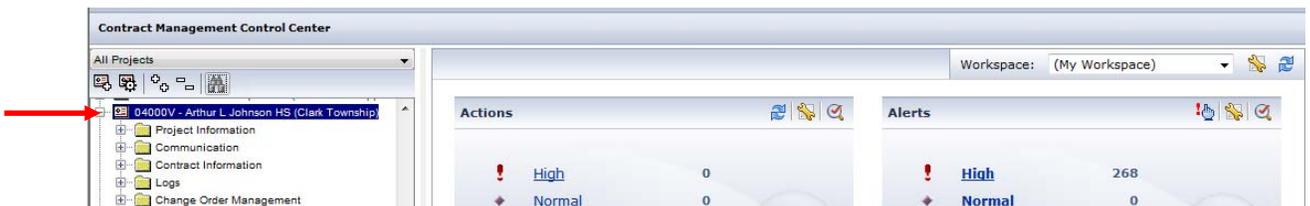
## VI. Updating Submittals, Single Reviewer

Updating Submittals can be done by accessing the **Submittals log** from the Control Center. You can also access the Submittal package and navigate to the desired submittal.

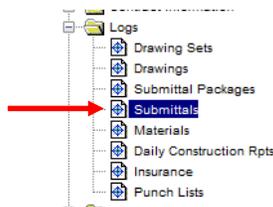
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



3. Open the **Logs** folder (a list of subfolders will display) and select **Submittals**. You can also go through the Submittal Package to find your Submittal to edit.

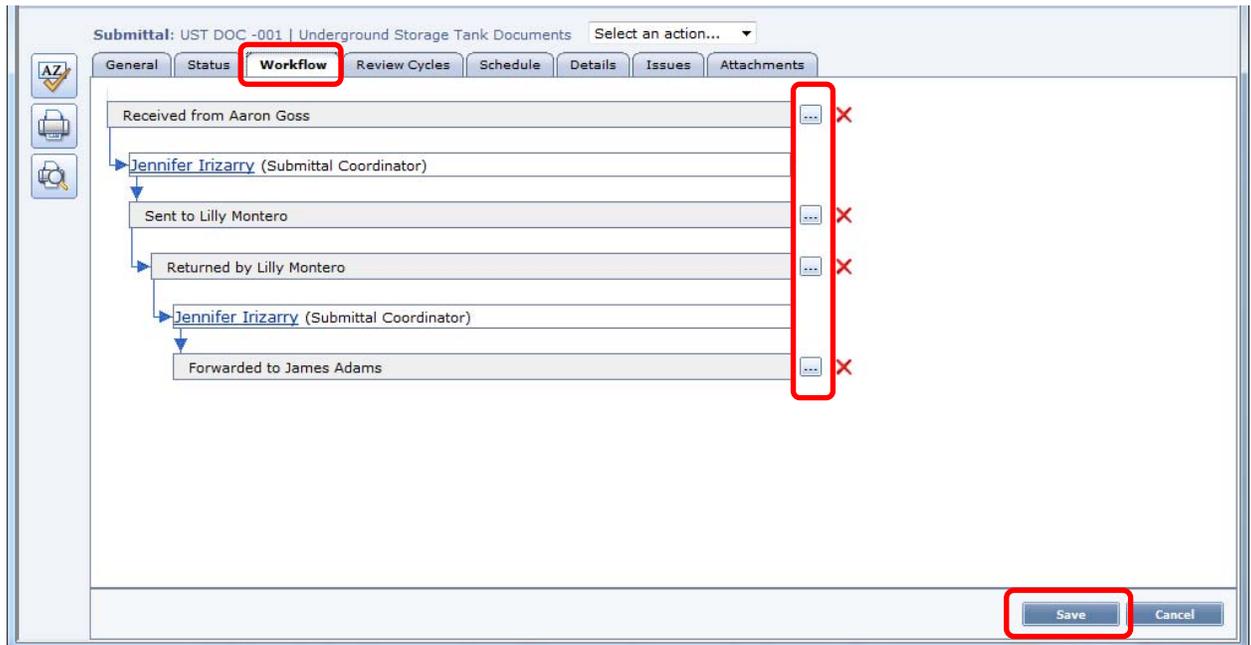


- The **Submittals Log** displays. Locate the submittal to be updated by using the navigation or the Find at the top of the window, then click the **Edit document** icon to open it.



### A. Edit Review Cycle Names

- To edit the required names in the review cycle, click the **Workflow** tab and use the select button next to the field to choose another name. Click the **Save** button at the bottom of the window when completed.



## B. Edit Review Cycle Dates

1. To edit the review cycle dates, click the **Review Cycles** tab and change the desired date using the calendar icon to reflect the submittal's progress through the review cycle. As the dates are entered for the various steps of the submittal process, the Ball in Court is automatically set to the next person to review the document based upon the workflow.

Click the **Save** button at the bottom of the window when completed.

Submittal: UST DOC -001 | Underground Storage Tank Documents Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add 001

Revision 001

General Details Distributions Issues Attachments

Review Cycle\* 001 Delete

Description Initial Review

Received on Nov 2, 2012 From Aaron Goss

Sent on Nov 5, 2012 To Lilly Montero

Returned on Nov 19, 2012 By Lilly Montero

Status New Item

Forwarded on Nov 20, 2012 To James Adams

\* Required

Save Cancel

## C. Enter a New Review Cycle

1. To add a new Review Cycle, click the **Review Cycles** tab and click the **Add** button.

Submittal: UST DOC -001 | Underground Storage Tank Documents Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add **001**

Revision 001

General Details Distributions Issues Attachments

Review Cycle\* 001 Delete

Description Initial Review

Received on Nov 2, 2012 From Aaron Goss

Sent on Nov 5, 2012 To Lilly Montero

Returned on Nov 19, 2012 By Lilly Montero

Status New Item

Forwarded on Nov 20, 2012 To James Adams

\* Required

Save Cancel

2. A new **Review Cycle** will be created. Notice that Contract Management automatically increments the number of the review cycle. Additionally, the names entered in the original review cycle have been carried over into the new review cycle.

Submittal: UST DOC -001 | Underground Storage Tank Documents Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add **002** 001

Revision 002

General Details Distributions Issues Attachments

Review Cycle\* 002

Description

Received on From Aaron Goss

Sent on To Lilly Montero

Returned on By Lilly Montero

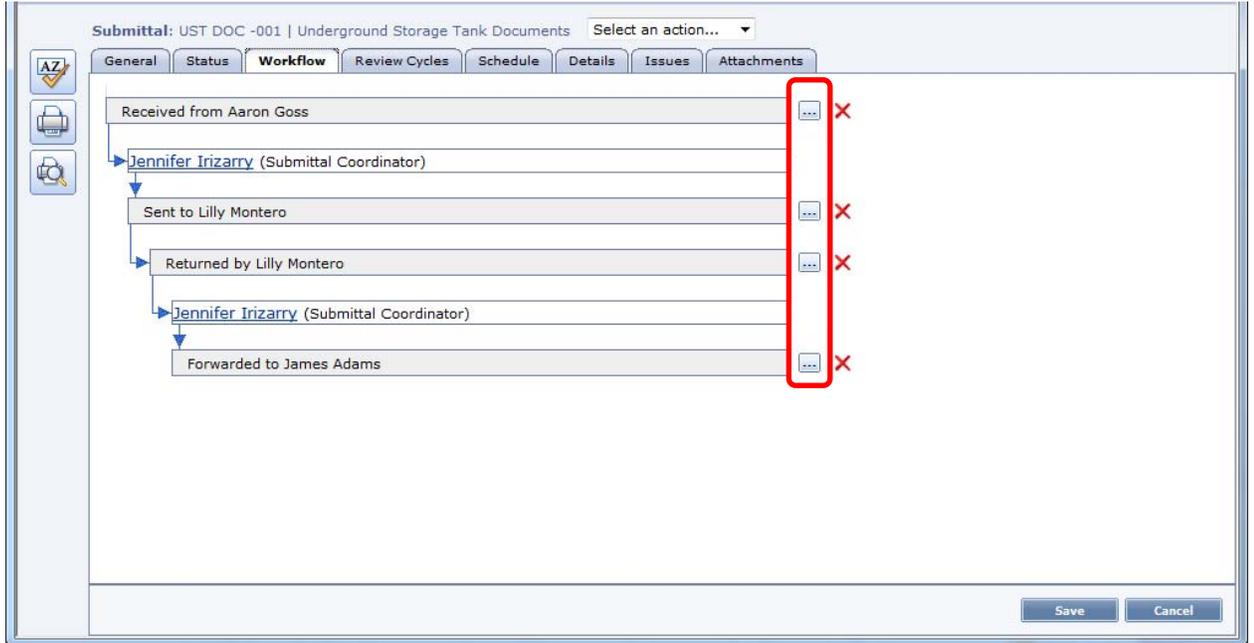
Status New Item

Forwarded on To James Adams

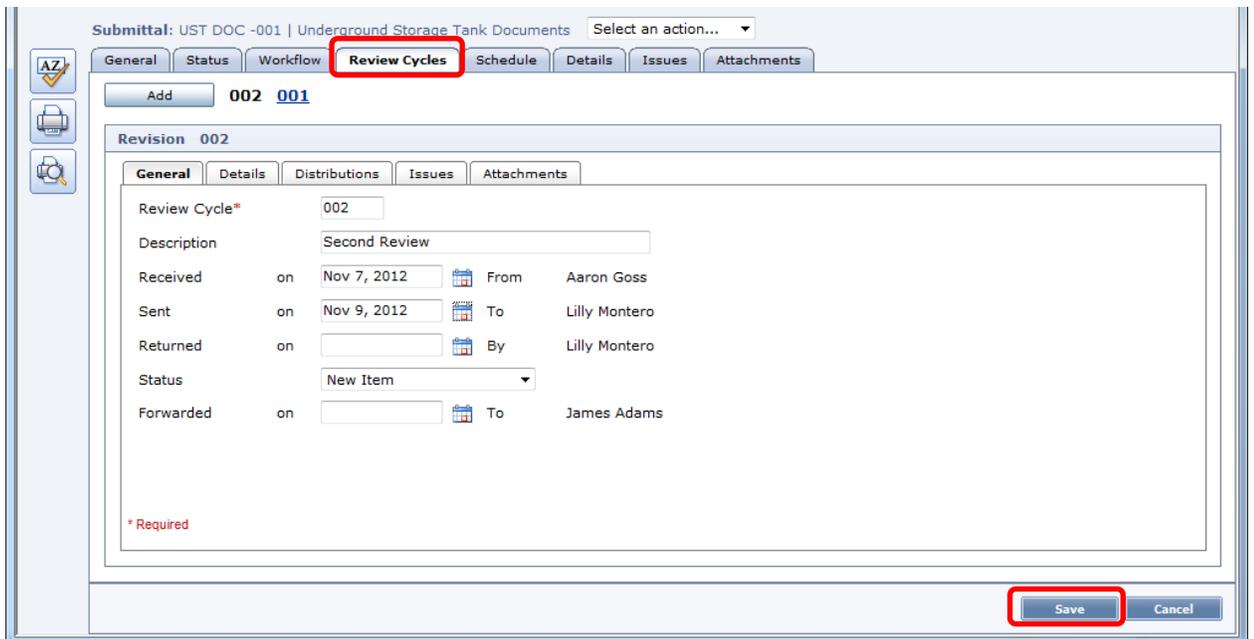
\* Required

Save Cancel

- To edit the required names in the new review cycle, click the **Workflow** tab and use the **select** button next to the field to choose another name.



- Click the **Review Cycles** tab and enter a **Description**, new **review dates** and any additional information as required. When completed, click the **Save** button at the bottom of the window.



## D. Delete a Review Cycle

It may become necessary to delete a Review Cycle due to an error in the information that was entered. If so, please do not delete anything until you contact the SDA Help Desk for assistance.

Submittal: UST DOC -001 | Underground Storage Tank Documents Select an action...

General Status Workflow **Review Cycles** Schedule Details Issues Attachments

Add **002** 001

Revision 002

General Details Distributions Issues Attachments

Review Cycle\* 002 **Delete**

Description Second Review

Received on Nov 7, 2012 From Aaron Goss

Sent on Nov 9, 2012 To Lilly Montero

Returned on By Lilly Montero

Status New Item

Forwarded on To James Adams

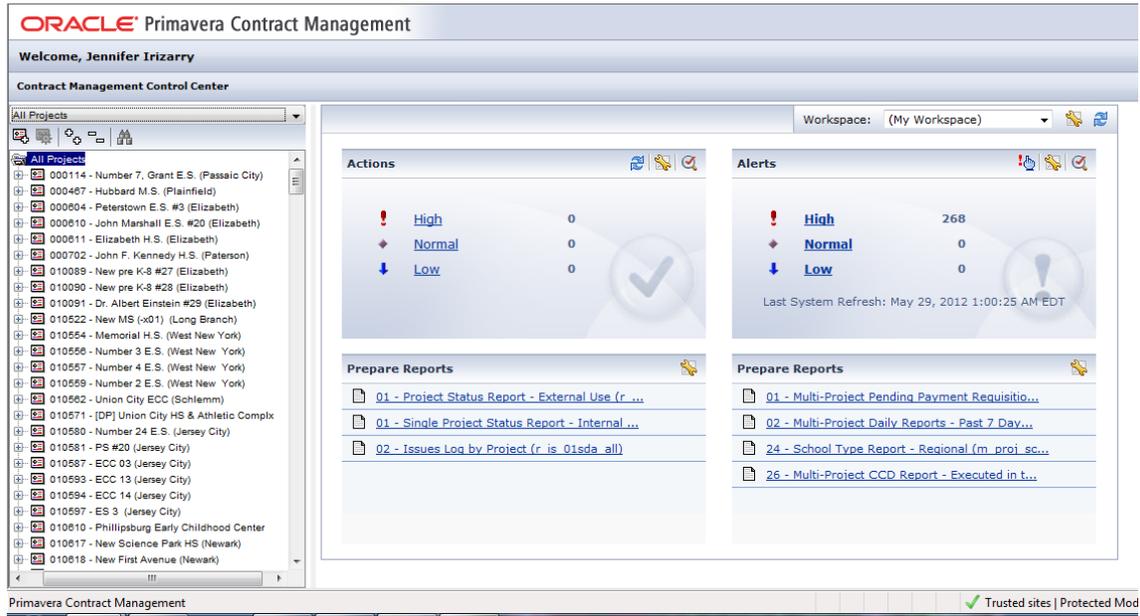
\* Required

Save Cancel

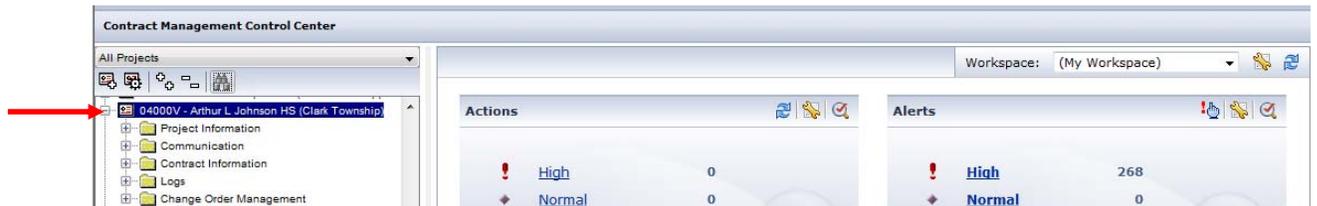
## VII. Updating Submittals, Multiple Reviewers

Updating Submittals can be done by accessing the **Submittals log** from the Control Center. You can also access the Submittal package and navigate to the desired submittal.

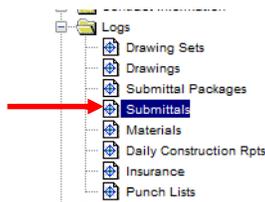
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



3. Open the **Logs** folder (a list of subfolders will display) and select **Submittals**. You can also go through the Submittal Package to find your Submittal to edit.

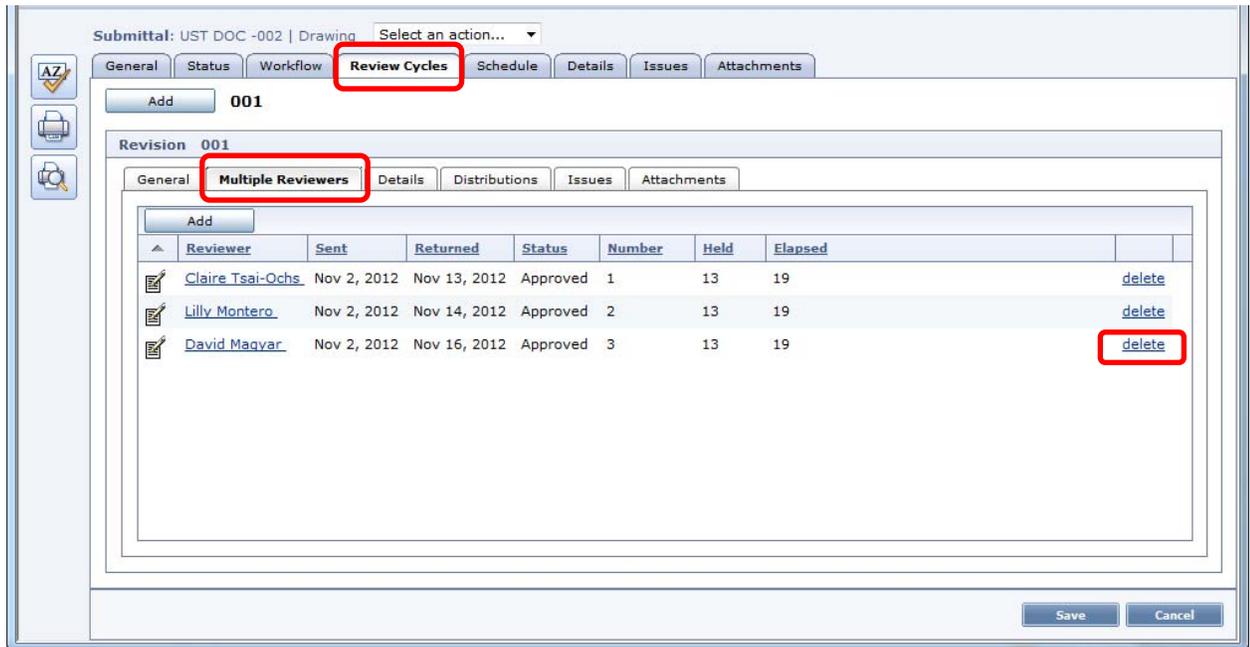


- The **Submittals Log** displays. Locate the submittal to be updated by using the navigation or the Find at the top of the window, then click the **Edit document** icon to open it.

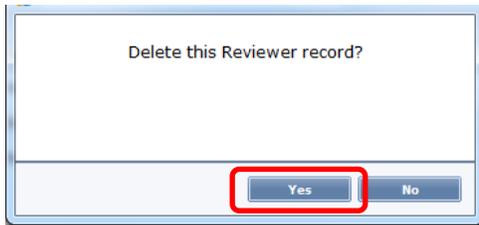


### A. Edit Multiple Reviewer Names

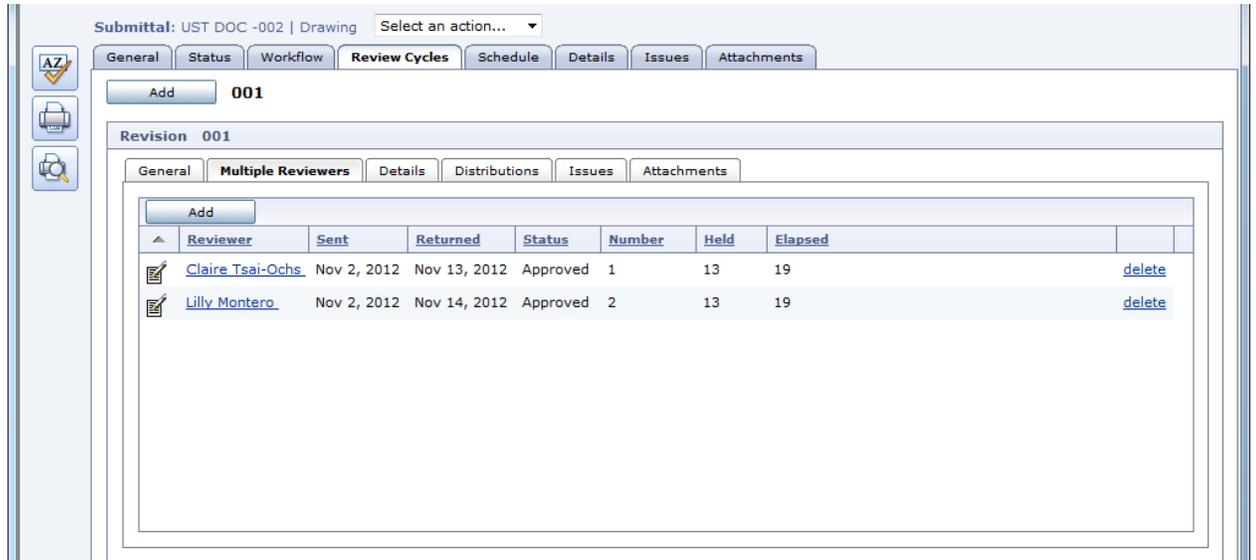
- To edit the required names in the review cycle, click the **Review Cycles** tab, then to the **Multiple Reviewers** sub-tab. If a name should be removed, click the **delete** link next to that person's name.



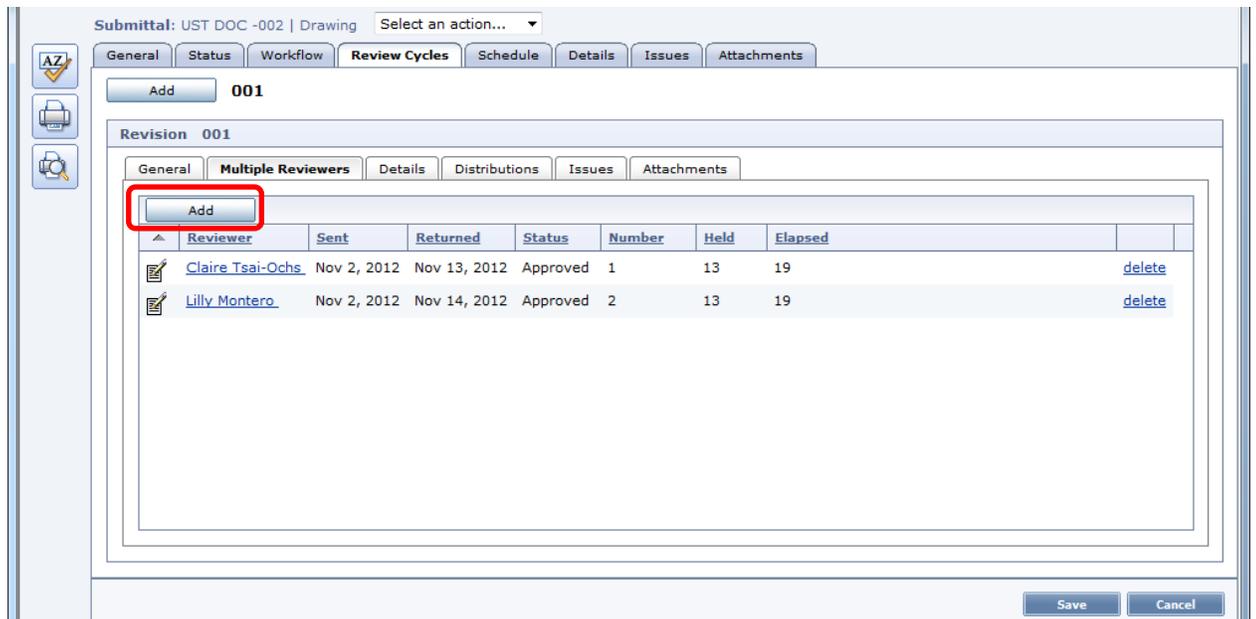
2. Click the **Yes** button to the question dialog box.



3. The document will show that the name(s) have been removed.



4. To add another name to the review cycle, click the **Add** button and follow the previously described processes for adding a reviewer name. When completed, click the Save button at the bottom of the window.



## B. Edit Review Cycle Dates

1. To edit the review cycle dates, scroll to the **Review Cycles** section and change the desired date to reflect the submittal's progress through the review cycle. Use the **calendar icon** to the right of the field to select the desired date. As the dates are entered for the various steps of the submittal process, the Ball in Court is automatically set to the next person to review the document based upon the workflow.

Review Cycles (Latest is 001, BIC is John Rivera)

[Add](#) 001

Review Cycle \* 001 [Delete](#)

Description Initial Review

Received on Oct 1, 2009  from Corrado Minervini

Sent to <multiple reviewers>

Returned by <multiple reviewers>

Status New Item

Forwarded on   to James Adams

Multiple Reviewers - Review Cycle 001

[Add](#)

Reviewer	Sent	Returned	Status	Number	Held	Elapsed	
 <a href="#">David Barie</a>	Oct 9, 2009		New Item	1	97	105	<a href="#">delete</a>
 <a href="#">Lilly Montero</a>	Oct 9, 2009		New Item	3	97	105	<a href="#">delete</a>
 <a href="#">John Rivera, BIC</a>	Oct 9, 2009		New Item	4	97	105	<a href="#">delete</a>

2. To edit the dates in the **Multiple Reviewers** section, click on the **edit icon** to the left of the desired name and update the date using the previously described processes.

Review Cycles (Latest is 001, BIC is John Rivera)

[Add](#) 001

Review Cycle \* 001 [Delete](#)

Description Initial Review

Received on Oct 1, 2009  from Corrado Minervini

Sent to <multiple reviewers>

Returned by <multiple reviewers>

Status New Item

Forwarded on   to James Adams

Multiple Reviewers - Review Cycle 001

[Add](#)

Reviewer	Sent	Returned	Status	Number	Held	Elapsed	
 <a href="#">David Barie</a>	Oct 9, 2009		New Item	1	97	105	<a href="#">delete</a>
 <a href="#">Lilly Montero</a>	Oct 9, 2009		New Item	3	97	105	<a href="#">delete</a>
 <a href="#">John Rivera, BIC</a>	Oct 9, 2009		New Item	4	97	105	<a href="#">delete</a>

## C. Enter a New Review Cycle

1. To add a new Review Cycle, scroll to the **Review Cycles** section and click the **Add** button.

Review Cycles (Latest is 001, BIC is Lilly Montero)

**Add** 001

Review Cycle \* 001 **Delete**

Description Initial Review

Received on Oct 1, 2009 from Corrado Minervini

Sent to <multiple reviewers>

2. A new **Review Cycle** will be created. Notice that Contract Management automatically increments the number of the review cycle. Additionally, the names entered in the original review cycle have been carried over into the new review cycle. However, although the review cycle indicates that multiple reviewers are involved, the names of the those reviewers were not carried over. They will need to be manually re-entered.

Review Cycles (Latest is 002, BIC is Lilly Montero)

**Add** 002 001

Review Cycle \* 002

Description

Received on from Corrado Minervini

Sent to <multiple reviewers>

Returned by <multiple reviewers>

Status

Forwarded on to James Adams

Multiple Reviewers - Review Cycle 002

**Add**

Reviewer	Sent	Returned	Status	Number	Held	Elapsed
----------	------	----------	--------	--------	------	---------

3. To edit the required names in the new review cycle, scroll to the **Workflow** section and use the select link on the right side of the screen to open the **Select Contact** dialog box to choose another name.

Workflow

Multiple Reviewers

Received from Corrado Minervini [select...](#) [clear](#)

Jennifer Irizarry (Submittal Coordinator)

Sent to <multiple reviewers>

Returned by <multiple reviewers>

Jennifer Irizarry (Submittal Coordinator)

Forwarded to James Adams [select...](#) [clear](#)

4. Enter a **Description**, new **review dates** and any additional information as required using the previously described processes.

▼ **Review Cycles** (Latest is 002, BIC is Lilly Montero)

[Add](#) 002 [001](#)

Review Cycle\*

Description

Received on   from Corrado Minervini

Sent to <multiple reviewers>

Returned by <multiple reviewers>

Status

Forwarded on   to James Adams

▼ **Multiple Reviewers** - Review Cycle 002

[Add](#)

Reviewer	Sent	Returned	Status	Number	Held	Elapsed

#### D. Delete a Review Cycle

1. It may become necessary to delete a Review Cycle due to an error in the information that was entered. If so, scroll to the **Review Cycles** section, and select the review cycle to be deleted.

▼ **Review Cycles** (Latest is 002, BIC is Jennifer Irizarry)

[Add](#) **002** [001](#)

Review Cycle\*  [Delete](#)

Description

Received on   from Corrado Minervini

Sent to <multiple reviewers>

2. Click the **Delete** button.

▼ **Review Cycles** (Latest is 002, BIC is Jennifer Irizarry)

[Add](#) 002 [001](#)

Review Cycle\*  [Delete](#)

Description

Received on   from Corrado Minervini

Sent to <multiple reviewers>

3. Click the **Yes** button on the question dialog box.



4. The document will show that the Review Cycle has been deleted.

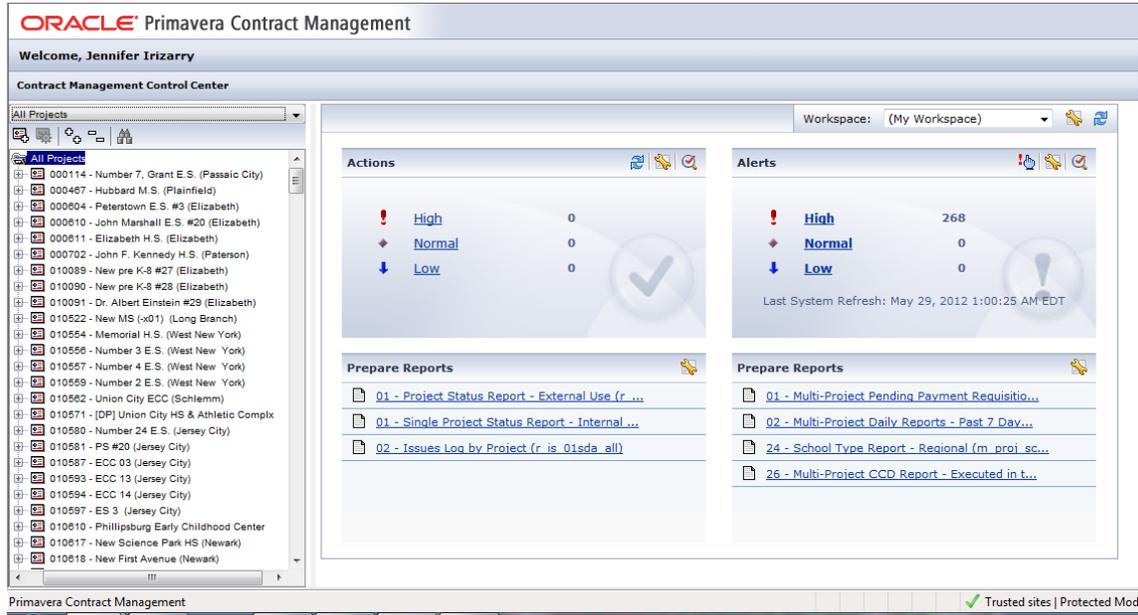


**Important:** Exercise caution when using this functionality. Once a Review Cycle is deleted, all associated information with that review cycle will be deleted and will need to be manually reentered.

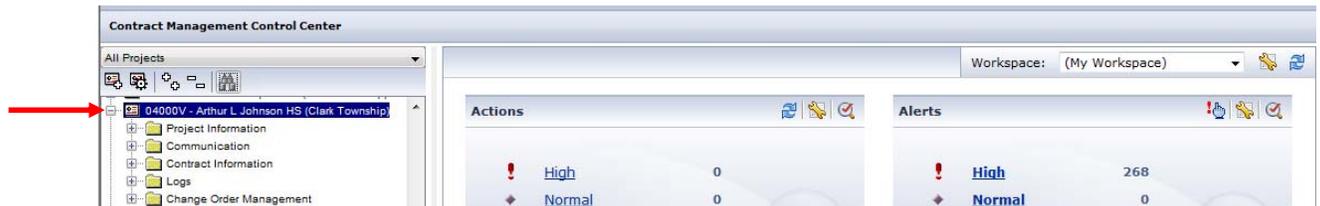
## VIII. Editing Submittal Packages

Once a Submittal Package is saved, there are a variety of ways in which to update the information contained in the Package.

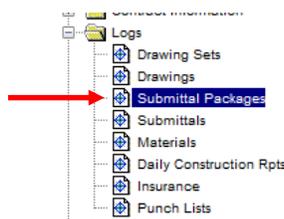
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



3. Open the **Logs** folder (a list of subfolders will display) and select **Submittal Packages**.



- The **Submittal Package log** displays. Locate the desired Submittal Package from the log and click the **edit icon** to open the package.

Control Center > Submittal Packages

Submittal Packages Select an action... Find Layout: <my layout>

Title	Package	Total Items	Submitted	Approved	Unapproved	Receiv
◉ Bidding & Contract Award Phase	BIDCON	0	0	0	0	
◉ Project Close Out Phase	CLOSEOUT	0	0	0	0	
◉ Construction Administration Phase	CONADMIN	0	0	0	0	
◉ Construction Document Phase	CONST	0	0	0	0	
◉ Design Development Phase	DESIGN	0	0	0	0	
◉ Post Occupancy Review Phase	POSTOCC	0	0	0	0	
◉ Schematic Design Phase	SCHEM	0	0	0	0	
◉ Underground Storage Tank Documents	UST DOCS	1	1	0	1	New Je

### A. Add Submittals to the Package

- Click the **Submittals** tab and click the **Add** button. Follow the remainder of the steps for creating Submittals as found in Section III (single reviewer) or Section IV (multiple reviewers).

Submittal Package: UST DOCS | Underground Storage Tank Documents Select an action...

General Status Workflow Template **Submittals** Schedule SDA Data Issues Attachments

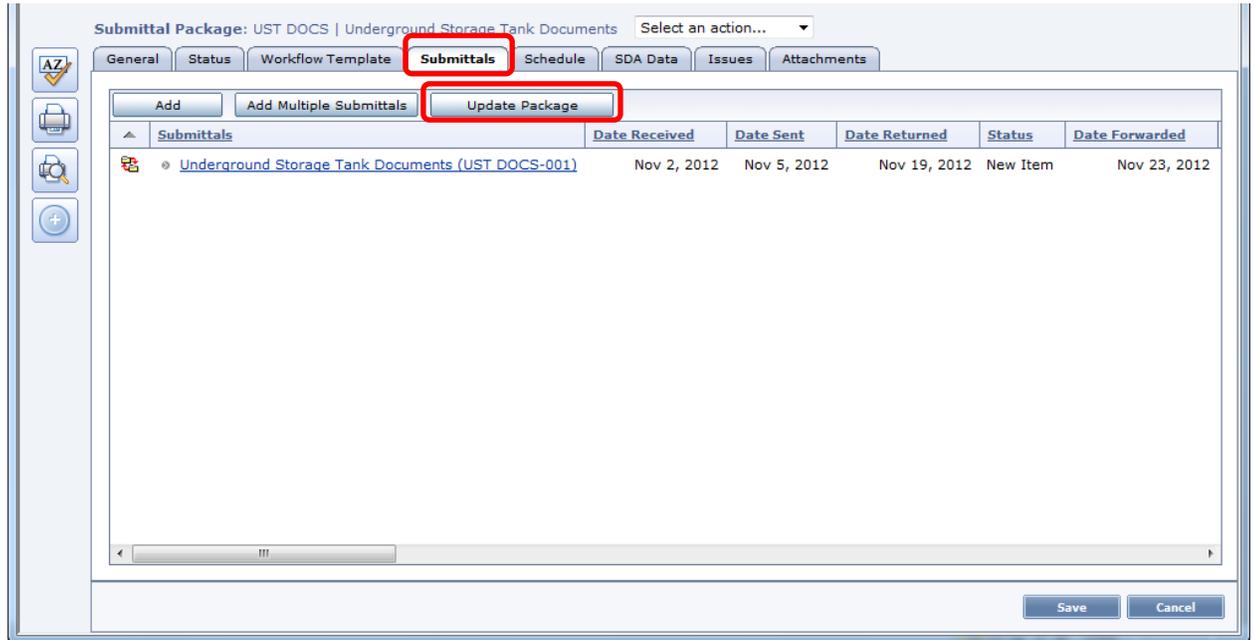
Add Add Multiple Submittals Update Package

Submittals	Date Received	Date Sent	Date Returned	Status	Date Forwarded
◉ Underground Storage Tank Documents (UST DOCS-001)	Nov 2, 2012	Nov 5, 2012	Nov 19, 2012	New Item	Nov 23, 2012

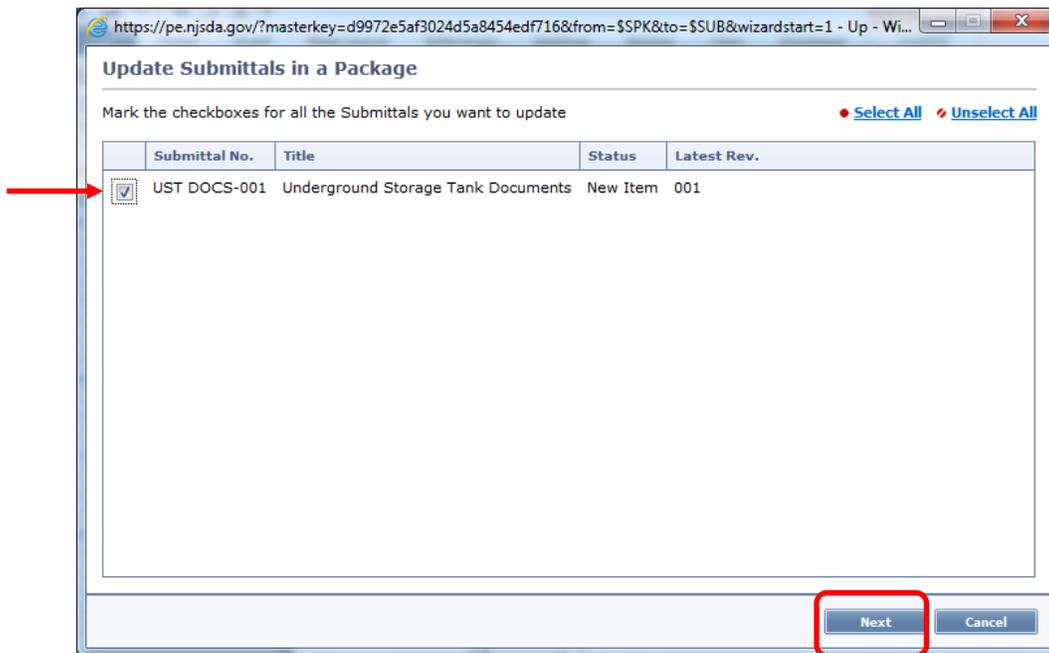
Save Cancel

## B. Edit Information in All Submittals Within the Package

1. To update information in all of the Submittals in the Package, click the **Submittals** tab and click the **Update Package** button.



2. The **Update Submittals in a Package** dialog box will display. Begin by selecting the Submittals you need to update by checking the appropriate check box to the left of the Submittal name. Click the **Next** button to continue.



3. Enter the required information in the fields provided. Click the **Next** button to continue.

**Update Submittals in a Package**

Primavera will update all the Submittals in this Package with the dates and status you provide below. Only date fields with values entered will be used.

Received Date

Sent Date

Returned Date

Forwarded Date

Status

Previous **Next** Finish Cancel

4. Finally, two questions will display:

- The **No** option will display by default on the first question. It is recommended to leave the default value so that no previously approved Submittals will be changed.
- The second question will ask if you want to add new revisions or overwrite existing revisions. It is recommended to leave the default of **Add new revisions as needed** so that no previously approved Submittals or revision documents are overwritten. This would erase the history of the document.

Click the **Finish** button to complete the updates to the Submittals.

**Update Submittals in a Package**

Primavera will set the dates and status of all the Submittals in Package UST DOCS Underground Storage Tank Documents to the dates and status you entered.

Do you want to update dates and status for Submittals that are already Approved?

yes  no

Do you want to add new revisions as needed or to correct existing revisions by overwriting with the dates you have provided?

Add new revisions as needed  
 Overwrite the dates and status of existing revisions

Previous **Finish** Cancel

## IX. CREATING AND PRINTING TRANSMITTALS

A Transmittal is a cover sheet used when sending project documentation to summarize what is included in the package, what action is being requested and other package summary information.

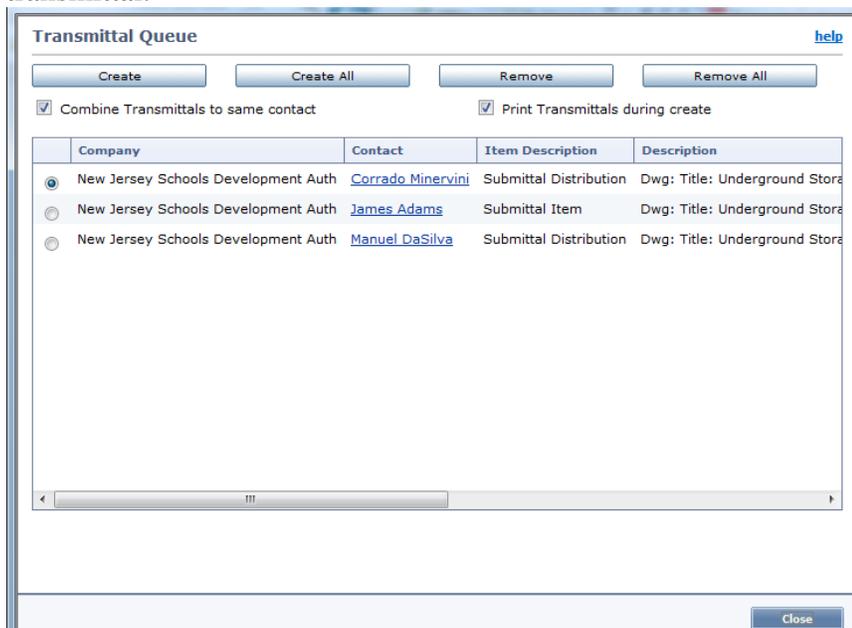
Each time an entry is made in the Send Date or Forwarded Date in a Review Cycle, or in the Distribution Section of a Submittal document, Contract Management automatically creates a Transmittal in the Transmittal Queue. The Transmittal Queue dialog box enables you to generate transmittals based on the revision updates and distribution contacts of your submittals.

**Note:** The Transmittal Queue will be unique for each project.

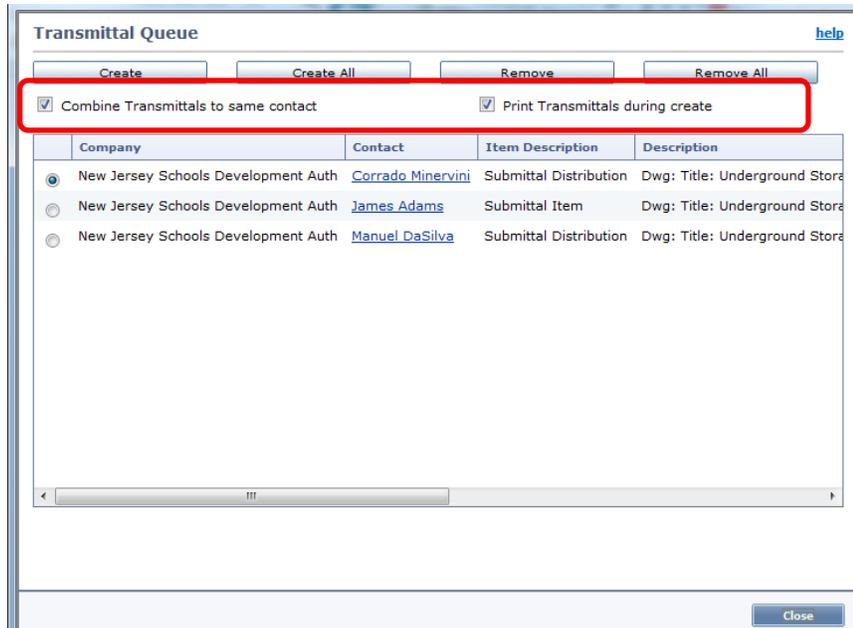
1. Scroll to the top of the screen and click the **Transmittal Queue** link. In this example, three (3) transmittals have been added to the queue.



2. The **Transmittal Queue** dialog box displays. From this dialog box, you can create transmittals, print them, and combine transmittal items to the same recipient into one transmittal.

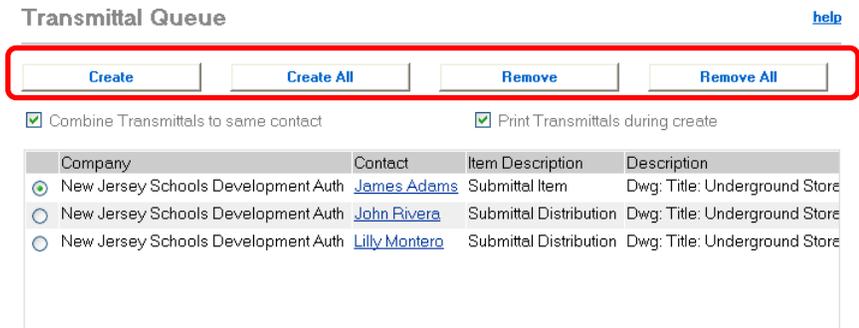


3. The **Combine Transmittals to same contact** checkbox will be checked by default. Leave the default to combine all transmittals that are going to the same contact.
4. **The Print Transmittals during create checkbox will also be checked by default. If desired, leave the default to print the transmittals when you click the Create button.** If you want to print the Transmittals at a later time, deselect the **Print Transmittals during create** checkbox. You will need to print these documents directly from the Transmittal module.

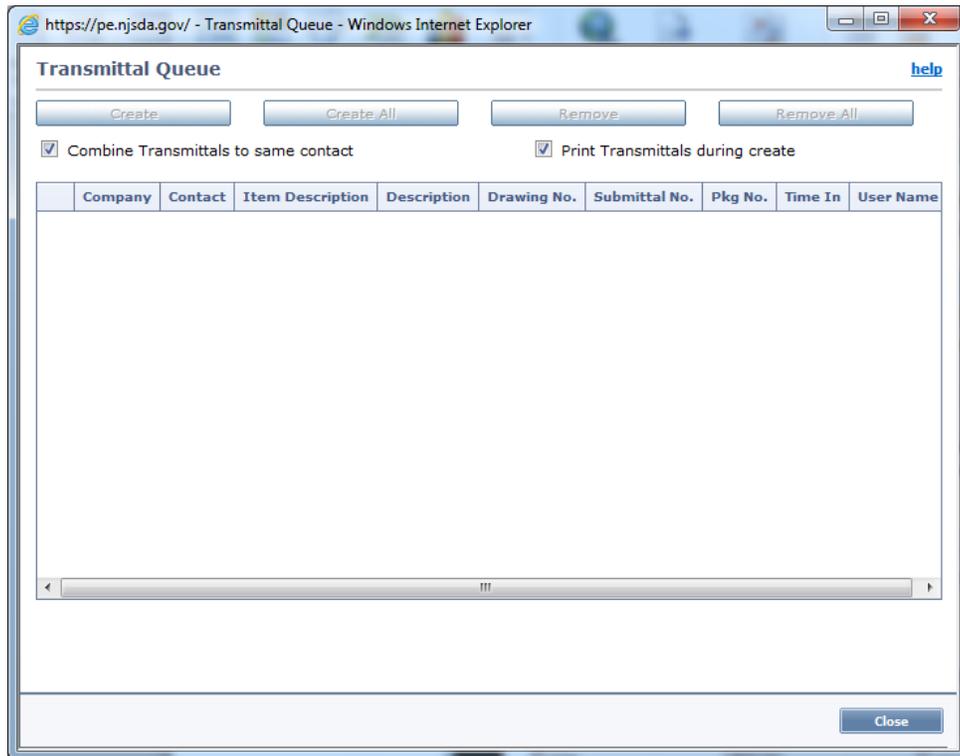


5. The buttons at the top of the screen are:
  - To create a single transmittal, select the desired submittal for which you want to create a transmittal by choosing the button to the left of the submittal and click the **Create** button.
  - To create transmittals from all of the items in the queue, click the **Create All** button.
  - To remove a single submittal from the queue, click the **Remove** button.
  - To remove all of the items in the queue, click the **Remove All** button.

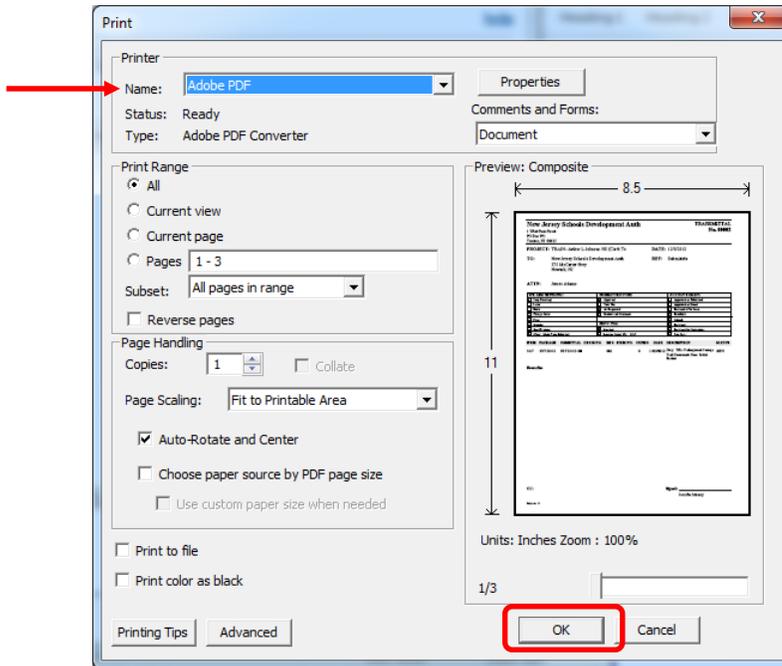
In the following example, the **Create All** button was chosen.



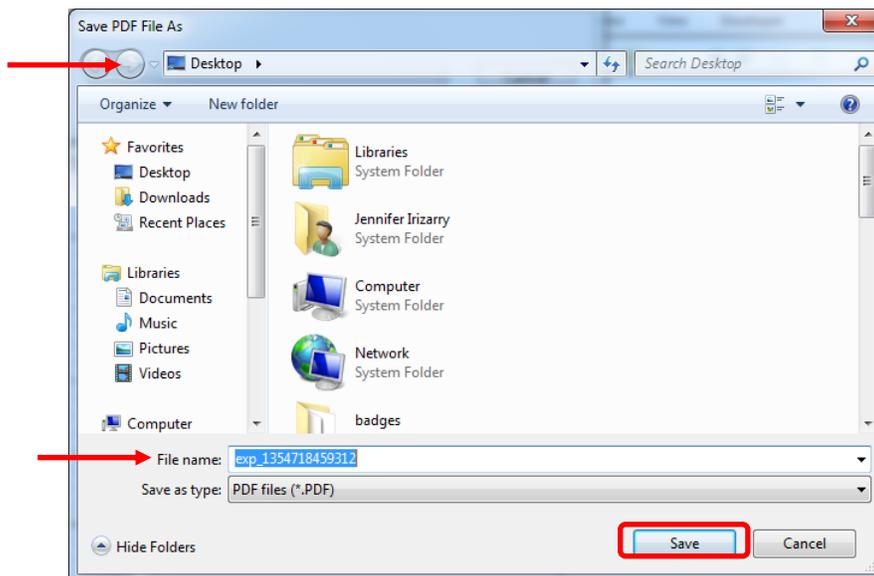
6. After clicking the **Create All** button, the transmittals in your queue will no longer display.



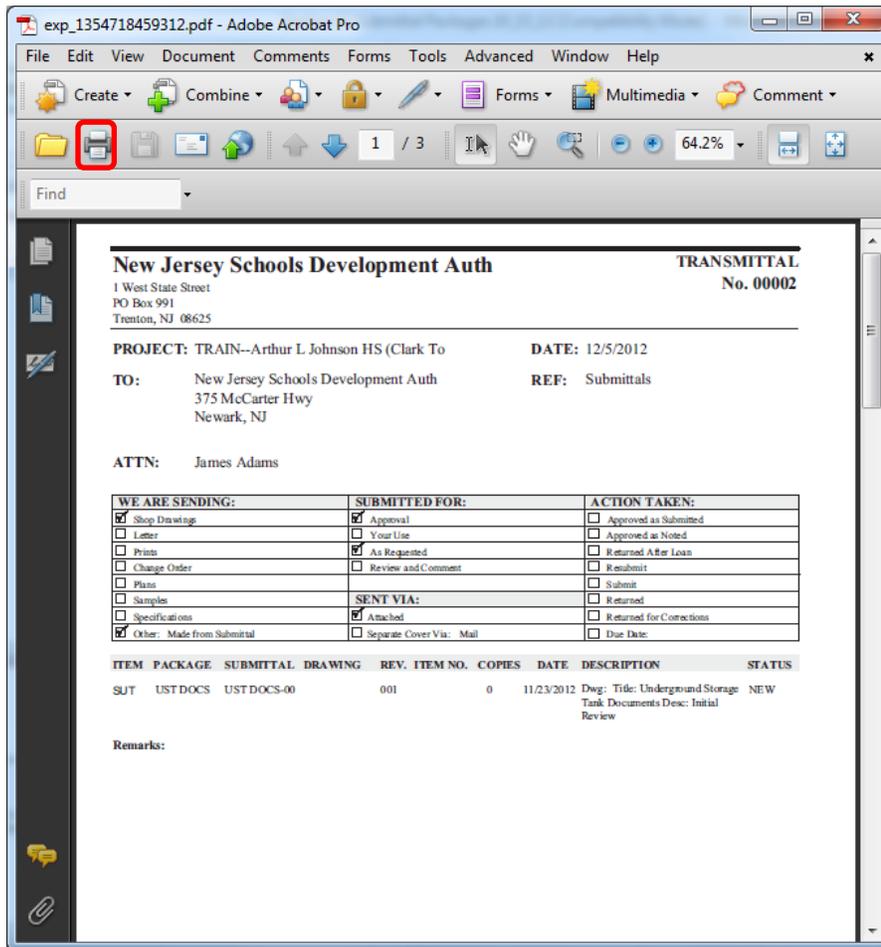
7. Since the default for the **Print Transmittals during create** checkbox was chosen, a **Print** option box displays. Choose the desired printer to get printed transmittals or create an Adobe PDF file for the output. In the following example, Adobe PDF was chosen. Click the **OK** button to continue.



8. To finish creating the Adobe PDF file, choose the desired file location in the **Save in** field and provide a file name in the **File name** field. Click the **Save** button when completed.



- The PDF file with your transmittals will display once the creation process is complete. They can be printed by choosing the **Print** option from the Adobe PDF screen.



## X. Monitoring Submittal Status Through Reporting

Submittals usually have a maximum review/response time flow which can be monitored in Contract Management. Monitoring Submittal status via reports is easy in Contract Management.

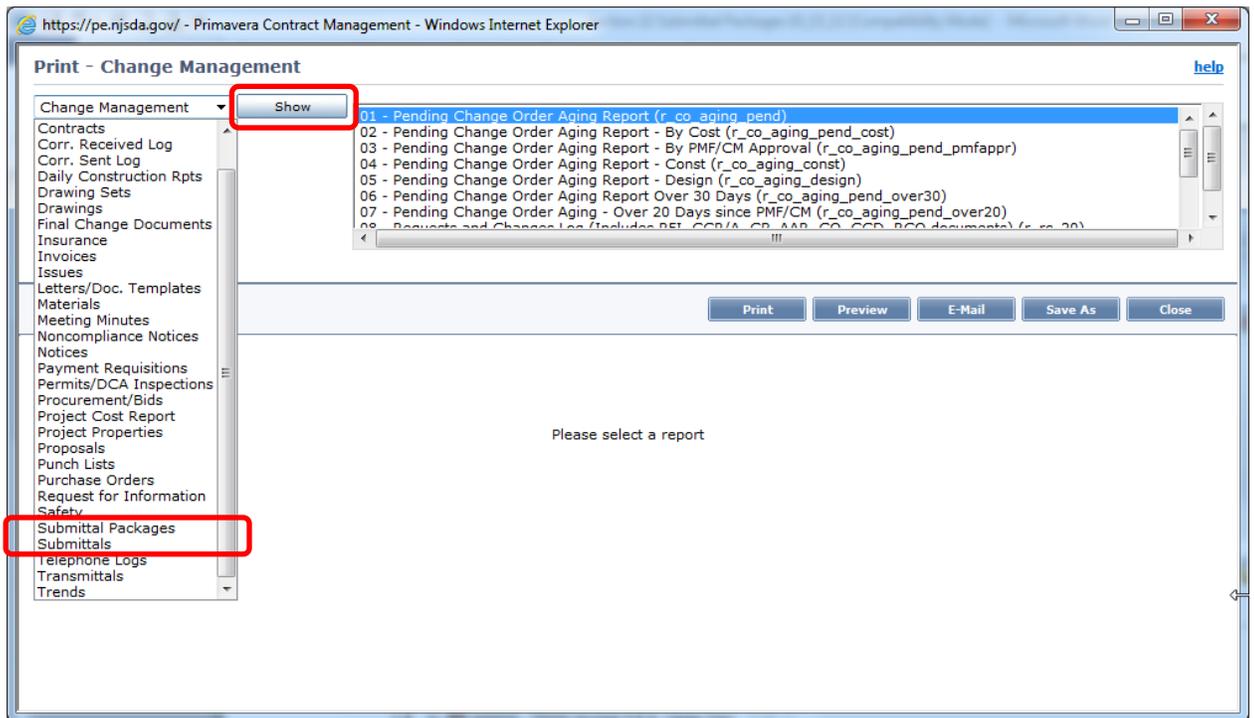
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



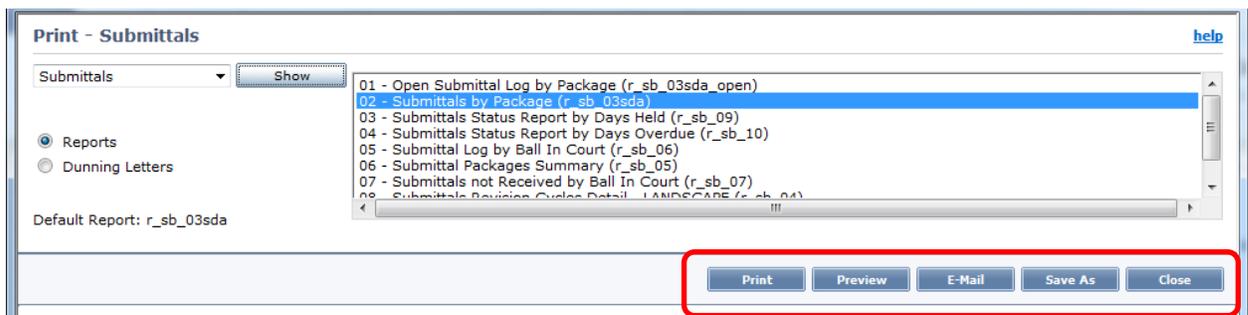
2. Select your desired project and click the Print button from the upper right portion of the screen. This is the Advance print function.



3. Select either Submittal Packages or Submittals and click the **Show** button to display a list of all reports available for that module.



4. In the example shown, the Submittals option was selected. Choose your desired report and click one of the following buttons to generate your report.



- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to return to the Control Center screen.

## XI. Alert Subscriptions

Alerts allow a user to receive a notification when a document is due or past due. The notification will display on the users Control Center screen in the Alerts box. The Alerts box will provide a direct link to the applicable Contract Management document.

1. To subscribe to an alert, select the **Requests and Access Forms** link under the **Contract Management Login** section.

STATE OF NEW JERSEY  
**SCHOOLS DEVELOPMENT AUTHORITY**

PRIMAVERA

Welcome to Contract Manager 12.1

[Bookmark Me!](#)

**Contract Manager Login:**

- ▶ Login
- ▶ Login Requirements
- ▶ Request and Access Forms (New User, Lost Password, Delete Request, Others)

**What is New**

- **Attn Primavera Users:**

We are pleased to announce the release of the new Consolidated Project Status Report today, August 18th. This report will allow users to see key data pertaining to

2. Select the **Alert Subscriptions** option.

STATE OF NEW JERSEY  
**SCHOOLS DEVELOPMENT AUTHORITY**

PRIMAVERA

Please make your selection:

- New User
- Lost or Forgot Password
- Modify Access
- Change/Modify User and Contact Info
- Request a Custom Report
- Request a Letter Template
- Request a Global Layout
- Request to Delete a Primavera Document
- Alert Subscriptions

- The **Contract Management Alert Subscription** page will display. Complete the contact information at the top of the page. Choose your desired alert by clicking the **Yes** box located to the right of the alert. Click the **No** box when you no longer wish to receive a selected alert. To receive the Submittals alert, click the **Yes** box on the **Submittals Overdue** option.
- Once all alerts are selected, click the **Submit** button at the bottom of the page. The Contract Management Systems Administrator will notify you via e-mail when your alert subscription has been processed.

**Note:** There is no limit to the number of alerts you can choose. Customized alerts are not available.


### Contract Management Alerts Subscription

Instructions: Check the boxes for the Alerts you would like to view

First Name:  Last Name:  Phone:  Email:

Alert	Description	Subscription
Change Orders Due/Overdue	Notifies the user if a change order entered will become due or overdue. These alerts are determined based upon the 'Required Date' field in the change order. Low Priority = 7 days prior to due date, Medium Priority = on due date, High Priority = 7 days past due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Meeting Minute Items Due/Overdue	Notifies the user if any business items within Meeting Minutes module are due. These alerts are based upon the 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = 3 days prior to due date, High Priority = on due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Safety Notice Entered	Notifies the user when a new safety violation has been entered.	<input type="checkbox"/> Yes <input type="checkbox"/> No
New Incident Report Entered	Notifies the user when a new injury or illness report has been entered. High priority alert on the date the doc is entered.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Drawings Distributed Today	Notifies the user of drawings that have been distributed today or if the drawings sent date is today's date. This is only a medium priority alert.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notice to Comply Due	Notifies the user of any non-compliance notices that are due. This is determined by the number of days till 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = on due date, High Priority = 5 days past due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notice to Comply with Response Not Complete	Notifies the user of any non-compliance notices that contain a response but have not been completed. This is determined by the action signature dates and responded date fields. Low Priority = document open 1 day, Medium Priority = document open 7 days, High Priority = document open 14 days.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Punch List Items Due	Notifies the user of any punch list items that are due. This is based on the number of days until the 'Due Date' field. Low priority = 30 days until due date, Medium priority = 10 days to due date, High priority = on due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Request for Information (RFI) Due	Notifies the user of any requests that are due. This is based on the 'Responded Date' field not having been entered. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
→ Submittals Overdue	Notifies the user if a submittal has reached or passed the date entered in the 'Due Date' field. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Unpaid Invoices	Notifies the user of an unpaid invoice. Low Priority = 20 days unpaid, Medium Priority = 25 days unpaid, High Priority = 30 days unpaid.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Proposal Requests and CCDs Due/Overdue	Notifies the user of any CCDs (aka Proposal Requests) that are due. (The responded date is not entered.) Low 20-25 days, Med 25-29 days, High 30+	<input type="checkbox"/> Yes <input type="checkbox"/> No

Submit
Cancel

NJSDA Home

- Once the subscription(s) are set up, alerts will be sent to the user via the Control Center in the **Alerts** option box. When the due date for a document approaches, the **High**, **Normal** or **Low** priority link will become active. Click the applicable priority link to view the alert, or click the **magnifying glass** to **View All Alerts**.



- The **Alerts** screen will display all applicable documents. Click on a blue document link to open the document for review.

