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About This Guide

This guide addresses questions frequently asked by construction team members when using Oracle Primavera Submittal Exchange to upload, retrieve, and track changes to construction project documents. General Contractors, Construction Managers, and Subcontractors should use this guide.
About Consent Notices

Consent notices alert you to the need to protect personally identifiable information (PII). You and your organization might be collecting, processing, storing, and transmitting PII while using Submittal Exchange. When you accept a consent notice, your consent covers the collection, processing, storing and transmission of PII data in all areas of Submittal Exchange and means of retrieving data from Submittal Exchange, including but not limited to project export, downloaded tables, reports, documents, web services, API, archival reports, project reports, event history, admin logs, project team page, all access logs, user list, and my account page.

You may be asked to provide consent to show that you understand the need to treat PII as secure data. You may also be asked to provide consent for your organization to collect, process, store, and transmit your PII. If you refuse consent, you will be denied access to Submittal Exchange.

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Viewing your PII Data in Submittal Exchange

You can see your PII in Submittal Exchange from the My Account and Team Member pages.
How Can I Get Submittal Exchange Pricing?

Pricing information for Submittal Exchange is usually provided to Architects, General Contractors, and Owners.

1) Please contact our Sales Team by phone at 1-800-714-0024 ext. 1 or by email at subex-sales_ww@oracle.com.
2) The sales representative will provide a copy of Submittal Exchange's pricing structure.

**Note:** Due to a large number of inquiries, we would like to state that Subcontractors are NOT charged for use of the Submittal Exchange system.

Adding a New Project to Submittal Exchange

General Contractors, Architects, or Owners can request a new project setup on Submittal Exchange. Your Client Relationship Consultant (CRC) or a representative from our sales team can assist you. Contact the sales team at 1-800-714-0024 x1.

The following information is required for project setup:

- Official project name
Submittal Exchange Construction Team User Guide

- Architect's contact information, including email
- General Contractor's contact information, including email
- Project manual or submittal schedule of the project.

Upon completion of an order form, we will begin to set up your project.

**How to Upload or Change Your Company’s Logo on the Submittal Exchange Website**

When logged into Submittal Exchange:

Select **Company Account** under your name in the upper right hand corner of your screen to see your **Company Info**.

1) Under the **Organization** label, select **Manage Logo** to the right of your company name. A dialog box appears.
2) Select the **Browse** button to search for the appropriate file on your computer.
   - Choose a GIF or JPEG file.
   - Select **Open**. The file name displays in the dialog box.
3) Select **Upload**.
4) Preview the new logo and select **Save** to use it.
5) You may need to select **Refresh** to see the new logo after saving it.

**Note:** Only .gif and .jpeg files are allowed for upload as a logo.

The company logo appears on the **Project Index** page and within the project. Only users within your company see this logo.

**Submittal Exchange User Name**

A user name is a user's full email address. For example, user name = sampleuser@samplecompany.com.

**How to Reset a Password**

**Note:** The username is always the user's full email address. This is universal to every user on the system.

2) Select **Login. Sign In** screen appears.
3) Select **Forgot Password**.
4) Enter your full email address and select **Continue**.
5) You will receive an email from Submittal Exchange that contains a link to reset your password.

**Note:** Do not copy and paste this password into the password text box.
the next time you login. Make sure to type it completely to ensure it works properly.

OR If you are logged into the system, you can change your password.
1) Select My Account under your name in the upper right hand corner of your screen, to see your Account Info.
2) Select the Change Password button. The screen changes.
3) Enter your old password in the Old Password field.
4) Enter your new password in the New Password and Re-Type Password fields. The password is encrypted, so only black dots appear as you type.
5) Select the Save button.

Creating New Roles

When logged into Submittal Exchange, select a project and go to the Project Team tab.
1) At the top of the page, select Manage Roles.
2) A dialog box appears. In the upper right corner, select Add New Role.
3) Enter the name of the role in the Role Name field.
4) Under Access Role, choose the distinction that best matches the new role from the drop-down list.
5) Under Security Privileges, select all the actions this new role has the ability to perform.
6) Select Save.

Notes:
- The new role user does not appear in the Project Team tab until you have assigned an user to this role.
- You must be a Project Leader to copy roles on your project.
- Administrators and Project Leaders can customize role labels at the Log level.

Copying Existing Roles from One Project to Another

When logged into Submittal Exchange, select a project and go to the Project Team tab.
1) At the top of the page, select Manage Roles.
2) A dialog box appears. In the upper right corner, select Add New Role.
3) To add a role used in one of your other projects, choose Select a Project and select the project name that contains the role from the drop-down list.
4) Next select Role, and choose the role from the drop-down list.
   - Select Load.
5) Ensure all settings for the role appear correct.
6) Select Save.
Adding Team Members to a Project as a Project Leader

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select Add User. A new Add Team Member dialog box appears.
2) Select the new team member’s company: choose a company listed on the project, or select New Company.
3) Enter the new team member's email address.
4) Select Next. A new dialog box appears.
5) For a new company, enter the company or organization name in the Company Name field.
6) Select Project Role from a drop-down list.
7) (Optional) Add a Title and Phone Number.
8) To add logs, choose Select from list and select logs.
9) To add sections, choose Select from list and select sections.
10) To add categories, choose Select from list and select categories.

Note: Select only those sections and categories the user must review and receive notifications for. Users have the ability to view all sections or categories on a project.

11) Select applicable email notifications.
12) Select Save.

Note: A Project Leader is able to add anyone to the project.

Adding Team Members to a Project as a General Contractor or Construction Manager

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select Add User. A new Add Team Member dialog box appears.
2) Select the new team member’s company: choose a company listed on the project, or select New Company.
3) Enter the new team member's email address.
4) Select Next. A new dialog box appears.
5) For a new company, enter the company or organization name in the Company Name field.
6) Select Project Role from a drop-down list.
7) To add logs, choose Select from list and select logs.
8) To add sections, choose Select from list and select sections.
9) To add categories, choose Select from list and select categories.
10) Choose applicable email notifications.
11) Select **Save**.

**Note:** General Contractors can add users from their own office as well as any Subcontractors.

### Adding Team Members to a Project as a Subcontractor

When logged into Submittal Exchange, select a project and go to the **Project Team** tab.

1) Select **Add User**. A new **Add Team Member** dialog box appears.
2) Enter the new team member’s email address.
3) Select **Next**. A new dialog box appears.
   - Your user settings automatically populate the new team member’s settings.
4) Select **Save**.

**Notes:**

- Subcontractors can only add other users from their own company.
- If settings of this new user need to be different, contact the General Contractor to make the changes.
- When a new user is added to a project, the user is automatically notified via email.
  - If that user has used Submittal Exchange in the past, the user receives one email notification indicating that the new project is available to them via the **Project Index** link.
  - However, two notifications are automatically generated to a new user if the user has never used Submittal Exchange before. One notification invites the user to access the project and a second provides the username and password information.

### How Does the Clone Setting Feature Work?

The **Clone Settings** feature is available within the **Project Team** tab when adding a new team member. It will copy a selected user’s role, log access, sections, categories, and email notifications. This reduces the manual entry of these items.

**Note:** Only the users you can edit are available for **Clone Settings**.
**Cloning a User's Settings**

When logged into Submittal Exchange, select a project and go to the **Project Team** tab.

1) Select **Add User**. A new **Add Team Member** dialog box appears.
2) Select the new team member’s company. Select a company listed on the project, or select **New Company**.
3) Enter the new team member’s email address.
4) Select **Next**. A new dialog box appears.
5) Select the user to clone from the **Project Team Members** drop-down list.
6) Select **Clone Settings**. This will copy the selected project team member’s user role, log access, sections, categories, and email notifications.
7) Verify the cloned settings are correct and edit as needed.
8) Select **Save**.

**Note:** Only the users you can edit are available for **Clone Settings**.

**How to Fix a User Assigned to an Incorrect Company**

If you have added a user and their company association came up incorrectly:

1) Leave the user on the **Project Team**.
2) Send an email to subex-help_ww@oracle.com or call Technical Support at 1-800-714-0024 ext.2.
3) Be sure to include:
   - The email address of the user you need to correct
   - The project name
   - The company the user should be assigned to (Company Name, Address, Phone).

**How to Download an Item Without a Submittal Exchange Account**

A Submittal Exchange user can send an item via email to someone without a Submittal Exchange account. The email includes a **Click to Download** link.

**Note:** File downloads are only active for 7 days.

1) Select the link within the email notification. The link leads to the Submittal Exchange Terms of Use page.
2) Review the Terms of Use.
3) Select the I have read and understood the Terms of Use check box.
4) Select the I agree to the Terms of Use check box.
5) Enter your full name.
6) Enter your company name.
7) Enter your email.
   **Note:** *Only the email recipient can download the item.*
8) Select **Continue**.

The PDF file download starts.

**Note:** *A Submittal Exchange user can send the email directly from a log or through the Return to Subcontractor dialog. See Sending a Submittal via Email (on page 58) for step-by-step instructions.*
Navigating Submittal Exchange Menus and Tabs

The top of each Submittal Exchange page has tabs and links for navigating the system.

1) Help Menu - Use the options under the Help icon to learn about Submittal Exchange and reach out for help.
2) Account Menu - Use the options under your name to review account information.
3) Project Index - Use the Project Index to select a project.
4) Message Center - Use the Message Center to see emails you receive from the system.
5) Reports Menu - Use the options under the Reports menu to generate reports or API keys.
6) Project Logs Tab - Use the Project Logs to select a log.
7) Project Team Tab - Use the Project Team tab to view and manage team members who have access to the project on the system.
8) **Sections & Categories Tab** - Use the **Sections & Categories** tab to edit the expected items for submittals and closeouts.

9) **Preferences** - Use the **Preferences** to view and edit project preferences.

10) **Event History** - Use the **Event History** to review previous events on your project.

11) **Alert Icon** - (not shown) - Use the **Alert** icon to access alerts on the system.

12) **Log Progress** - Use the **Log Progress** to see the percentage of items that have been submitted and reviewed.

13) **Savings Calculators** - Use the **Savings Calculators** to see what your organization has saved by using the system.

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### Help Menu

When logged into Submittal Exchange, the **Help** menu is located at the very top of your page. Use the options under the **Help** icon to learn about Submittal Exchange and reach out for help.

- **Support Home** - Customer Support links and tools for PDFs
- **Video Tutorials** - Step-by-step videos that show how to use the Primavera Submittal Exchange system
- **User Guides** - User guides for Construction and Design Teams
- **Contact Us** - Contact information to email or call customer support.

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### Account Menu

When logged into Submittal Exchange, your name appears at the top of the page. This is **Account** menu; Use the options under it to review account information.

- **My Account** - Review or update user account information, preferences, or email settings
- **Company Account** - See or update organization information, manage users, review codes, or manage logos
- **My Library** - Store and access documents in a personal library

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### Where is My Library?

The **My Library** feature is available to store documents in a personal library on Submittal Exchange. When logged into Submittal Exchange, select your name in the top right hand corner of the page, and choose **Manage My Library**. This feature is available at all times.

To view your files or add files to **My Library** select the **Manage My Library**. A **My Library** dialog box appears with a table of files.

### Edit a File in My Library

1) On the right hand side of the table in the **My Library** dialog is an **Action** column. Actions allow you to **Delete**, **Rename**, and **Edit** your files.

2) Select the **Edit** function. A built-in PDF editor appears. Make your changes.
3) Save and return to **My Library**.

**Note:** A My Library icon will be to the right of all **Browse** options when uploading documents into Submittal Exchange.

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### Project Index

When logged into Submittal Exchange, the **Project Index** is located at the top your page. The **Project Index** shows a list of the Submittal Exchange projects to which you are assigned. These projects are organized by project number and project name. Other fields include:

- **Pending GC/CM** - The number of items pending General Contractor or Construction Manager review
- **Pending Design Team** - The number of items pending Design Team review
- **Updated (7 days)** - The number of items approved in the last 7 days
- **Total Items** - The total number of items in the project.

**Note:** The **Project Index** is the page that appears first when you log into Submittal Exchange.

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### Message Center

When logged into Submittal Exchange, the **Message Center** is located at the top right corner of your page.

To view automated emails from Submittal Exchange, select the **Message Center**. This contains all the emails you receive from notifications@submittalexchange.com.

1) Select **View All Projects** to filter to a specific project.
2) Choose the type of email you are looking for.
3) When the email has been located, select the description in the **Subject** column.
4) Select **Back to messages** to get back to the listing of emails.

---

### Reports Menu

When logged into Submittal Exchange, the **Reports** menu is located at the very top right corner of your page. Use the options under the **Reports** menu to generate reports or API keys.

- **Reports** - Generate and review various project and Submittal Exchange reports
- **APIs** - Get API keys and add API keys.

**Note:** If you need Submittal Exchange application programming interface keys (API keys), please contact help@submittalexchange.com or call technical support at 1-800-714-0024, extension 2.
**Project Logs**

After selecting a project in Submittal Exchange, tabs appear under the header. The *Project Logs* tab lists the logs available on a project. Use the *Project Logs* drop-down to select a log for review. The list can include:

- ASIs
- Closeouts
- Daily Reports
- Invoicing and Payment
- PRs
- Photos
- Project Documents
- RFIs
- RFPs
- Submittals

**Project Team**

After selecting a project in Submittal Exchange, tabs appear under the header. The *Project Team* tab shows teams and team members who have access to the project on Submittal Exchange. This tab is organized into 8 columns:

- **Company** - Lists all companies involved.
- **Name** - Lists the names of individuals involved.

  **Note:** If the *Name* column indicates *User must login to confirm name*, the person has yet to log into Submittal Exchange.

- **Email** - Lists the email addresses of team members.
- **Title** - Lists titles of the team members.
- **Phone** - Lists the phone number of team members.
- **Sections** - Lists the sections that are viewable when to team members upon first log in. Users can upload, review, and receive email notification receipts for the sections listed.
- **Categories** - Lists the categories that are viewable when team members first log in. Users can upload, review, and receive email notification receipts for the categories listed.
- **Email Notifications** - Controls the emails team members receive based on the *Sections* and *Categories* they have listed.
- **Logs Column** - Lists the logs that are viewable by the user.
Sections & Categories

After selecting a project in Submittal Exchange, tabs appear under the header. The **Sections & Categories** tab contains the specification sections, expected items (from the project manual or submittal registry), and any categories that have been created. This information dictates what is displayed in the Submittal and Closeout logs.

Within this area, a Project Leader can add, edit, or delete specification sections, expected items and categories.

Users who are not Project Leaders, but do have General Contractor/Construction Manager, Architect, or Consultant roles can edit the expected items (Submittals and Closeouts).

Preferences

After selecting a project in Submittal Exchange, tabs appear under the header. The **Preferences** tab contains project preferences.

**Preferences**—This controls the name, number, location information, and the functionality available on Submittal Exchange for the project. Submittal numbering scheme, review flow, and log settings are all determined through the **Preferences** tab.

**Internal Project Number**—This allows each company to use their own internal project number. This number is specific to your company on this project.

**Required Item Turnaround**—This allows each company to adjust the number of days before they receive reminders about items pending their review.

Alert Icon

After selecting a project in Submittal Exchange, tabs appear under the header. An **Alert** icon will appear to the right of the project name if applicable.

The icon will show number of alerts. Hover over the icon to view the alert details.

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**Note**: Alerts include project milestones, required project actions, system announcements, etc.

Log Progress

After selecting a project in Submittal Exchange, tabs appear under the header. A percentage icon displays to the right of the project name in Submittal or Closeout logs. This is the **Log Progress** icon. Select the icon to see the percentage of items that have been submitted and reviewed.

This counts all expected items within the log you are currently in (i.e. Submittal or Closeout). It also counts one item for each section that does not display any expected items.
Note: If there are no expected items anticipated for a section, best practice is to remove that section from the project.

The % Submitted measurement indicates the percentage of expected items within the log for which information has been uploaded to the project.

The % Reviewed measurement indicates the percentage of the expected items within the log that have made it through the entire review process and have been sent back to the Subcontractors for the project.

Savings Calculator Icons

After selecting a project in Submittal Exchange, tabs appear under the header. The Preferences tab contains project preferences. The Savings Calculator icons appear to the right of the project name. The icons appear under a You have saved title.

Use these savings calculators to see what your organization has saved by using the system.

Trees—See the number of trees saved by using Submittal Exchange.

Time—See the shipping days saved by using Submittal Exchange.

Money—See the amount of money saved by eliminating the creation and shipping of documents by using Submittal Exchange.

Navigating Submittal Exchange Project Logs

The top of each log has options you can use to customize your view.

Note: Not all users will see all menus, tabs, or options. Access to some features depends on which role or team you are on.

1) Show Paging/Show All—Use the pagination toggle to see items in pages or to show them on one scrolling page.

2) Actions—Use the Actions menu options to expand or collapse sections and categories, lock columns, and set up in-column filters.
3) **Log Display**—Use the **Log Display** toggle button to view only the most recent information or the full log for all items.

4) **View**—Use the **View** toggle button to view only **My Activity** or **All Activity**.

   **Note**: The system shows the last view selected, even when a user logs out. A user can manually switch back and forth between **My Activity** and **All Activity**.

5) **Div**—Use the **Div** (division) drop-down to limit the view of your content to the selected division.

6) **Filter**—Use the **Filter** drop-down to limit the view of your content to the selected filter.

**Show Paging**

When logged into Submittal Exchange, select a project. If a log has multiple pages, the content can be displayed in two ways.

- **Pages**—The list of pages appears below the log name. Below the log name is a **Show All** link that allows you to change to the scrolling view.
- **Scrolling**—All the items in the log appear on a single scrolling screen. Below the log name is a **Show Paging** link that allows you to change to the pages view.

**Actions Menu**

When logged into Submittal Exchange, select a project. The **Action** drop-down menu appears above the table. It shows options to expand or collapse sections and categories, lock columns, and set up in-column filters.

**Collapse All Action**

When logged into Submittal Exchange, select a log from the **Project Log** drop-down.

Select **Collapse All** from the **Actions** menu above the table. The table only shows the latest activity for each item. The purpose of the **Collapse All** feature is to show only the latest activity for each item in a log. Use the collapsed view to focus on recent activity.

**Notes**:

- The default setting is **Collapse All**.
- Switch back and forth between **Collapse All** and **Expand All** manually. The setting remains on the current view unless manually switched.
- The **Expand All** feature presents the item history, which can overwhelm a user with history that is no longer relevant.
Expand All Action
When logged into Submittal Exchange, select a log from the Project Log drop-down.
Select Expand All from the Actions menu above the table. The table shows all activity for each item. Use the expanded view to see the item history.

Notes:
- The default setting is Collapse All.
- Switch back and forth between Collapse All and Expand All manually. The setting remains on the current view unless manually switched.
- The Collapse All feature presents only the latest activity for each item.

Lock/Unlock Columns Action
When logged into Submittal Exchange, select a log from the Project Log drop-down. The Actions menu includes either Lock Columns or Unlock Columns, depending on your current selection.

Select Lock Columns from the Actions to show the Submittal # or RFI #, the Type, and the Description columns no matter how far to the right you scroll.

Select Unlock Columns to scroll through columns freely.

Note: Switch back and forth between Lock Columns and Unlock Columns manually. The setting remains on the current view unless manually switched.

Show/Hide Filters Action
When logged into Submittal Exchange, select a log from the Project Log drop-down.

Select Show Filters from the Actions menu above the table. A Filter row appears below the table header.
Enter a value in the Filter field of any column to see only the rows that contain that value.
Select Hide Filters from the Actions menu above the table. The Filter row disappears from the table.

Download Multiple Files Action
When logged into Submittal Exchange, select a log from the Project Log drop-down.

1) Select Download Multiple Files from the Actions menu. The Download Multiple Files page appears.
2) Select the sections or the files you want to download.
You can also use Select All or Deselect All to choose files to download.
Subcontractors can only download files from sections or categories to which they have been added.

3) Select **Download Now**. The system sends an email when the download completes. The email includes instructions for downloading a ZIP file.

Note: The download process runs every 30 minutes. The system does not allow you to download more files before your first request is finished.

**View User Access**

See who can access the log with the **View User Access** feature. When logged into Submittal Exchange, select a log from the **Project Log** drop-down. Select **View User Access** from the **Actions** menu. The **View User Access** window appears. It shows the user email and the role the user is assigned.

Notes:

- Any user with access to the log can view the user list.
- The **View User Access** feature is only available with standard views of a log type.

**Log Display Options**

When logged into a project on Submittal Exchange, each log has two display options which can be adjusted using a toggle button located to the right of the **Actions** menu.

Note: The display option not currently selected is also included in the **Actions** menu.

The **Display Full Log** option contains the full log of activity for all items in that log.

- This view contains all the information about a review.
- It displays who, what, and when something was uploaded or reviewed.
- It is used to verify where a Submittal is in the review flow.
- The **Full Log** can be used to locate and view a file other than the most recent file.
- Documents can be uploaded and reviewed in this display.

The **Display Summary** option contains only the most recent information/review within each section or category.

- The **Status** column shows whether an item is still needed or who has reviewed/submitted the most recent document.
- The **Date** column shows the most recent date of an upload or review.
- The **Type** column shows the most recent electronic file, or it shows the item was sent as a hard copy, rather than submitted electronically.
The **Action** column shows the action/review code for the document once a review has been completed by a Design Team member.

Documents can be uploaded and reviewed in this display.

**Note:** If the **Type** column shows PENDING, the item is in a review stage during which you cannot view the file. This provides the same checks and balances as the paper-based system.

### View Options

When logged into Submittal Exchange, select a project. The **View** option is located above the table. In the drop-down, choose between **My Activity** and **All Activity**.

- **My Activity** shows only the sections and categories to which you are assigned regardless of which log is selected. These are the sections and categories you can upload and review. Each has a green upload arrow in the **Upload** column.

- **View All Activity** shows all sections and categories within a log. This is a read-only full project view for all trades. It's available for coordination purposes; you can only upload to sections and categories to which you are assigned.

  **Note:** The system shows the last view selected, even when a user logs out. A user can manually switch back and forth between **My Activity** and **All Activity**.

### Division Options

When logged into Submittal Exchange, select a project. The **Div:** option is located above the table. The filter will limit the view of the log content to a specific division based on the filter you choose. The available divisions are listed in the drop-down menu.

### Filter Options

When logged into Submittal Exchange, select a project. The **Filter** option is located above the table. The filter will limit the view of the log content to specific items based on the filter you choose.
Filter Options

**Note:** When you log in to Submittal Exchange for the first time this filter defaults to show all items on the project. This is the standard view.

**Submittals Pending Design Team** - This filter shows only items pending the Design team. Items include those submitted by the General Contractor/Construction Manager that have not been reviewed by the final reviewer.

**Submittals Pending Final Review** - This filter shows items that do not have a Consultant reviewing and those for which Consultants have completed their review.

**Reviewed Submittals** - This filter shows items that have been fully reviewed by the Design team and returned to the Construction team.

**Submittals Needed** - This filter shows items that have yet to be submitted by the Construction team.

**Submittals Pending GC** - This filter shows items that Subcontractors and Suppliers/Vendors have submitted which are awaiting the General Contractor/Construction Manager review, as well as items pending release by the General Contractor/Construction Manager back to the Subcontractor or Prime Contractors.

**Updated Last 7 Days** - This filter shows items that have been updated in any way within the last 7 days.

**Deleted Items** - This filter shows items that have been deleted by a project team member or items that have been removed from the logs via the Sections & Categories tab.

**Note:** Once you select a filter option, you must manually change it back to the None to see the standard view.

Adding a Category or Section to a User’s Account

When logged into Submittal Exchange, select a project and go to the Project Team tab.

**Note:** If a user cannot upload to a particular category or section, the user’s settings may not include it.

1) Select the team member: choose the user’s name or email address. The Edit Team Member page appears.

2) To edit sections:
   - Choose Select from list and select sections.
   - Select Done.

3) To edit categories:
   - Choose Select from list and select sections.
   - Select Done.

4) Select Save once the necessary sections or categories have been added.
Notes:
- Multiple team members can be edited at once.
- A Project Leader can make adjustments to all team members.
- Architects can make adjustments to users at their company as well as their Consultants.
- General Contractors or Construction Managers can make adjustments to users at their company as well as their Subcontractors.
- All other parties should reach out to their main point of contact on the project.

Adding Specifications Sections to a Project

**Note:** This task can only be performed by the Project Leader on Submittal Exchange. If you need to add sections to a project and are not a Project Leader, contact a Project Leader. You can find a Project Leader in the **Project Team** tab.

When logged into Submittal Exchange, select a project and go to the **Sections & Categories** tab.

1) Select **Add new** under the existing **Sections** box. An **Edit Sections** dialog box appears.
2) Enter a **Section Number** and **Section Title** for each section to be added to the project.
3) Select **Save** at the bottom of the dialog box. The system adds the new sections.
4) Verify that any new sections appear in the **Sections & Categories** tab or in the **Submittal Log**.

**Note:** You may also add expected submittal items under the **Sections and Categories** tab. Refer to **Adding Expected Items** for instructions.

Changing an Office Location or Address

Users can edit their current office address or add additional office locations. Users can also assign which users from their company are associated with each location. When logged into Submittal Exchange follow these steps:

1) Select **My Account** under your name in the upper right hand corner of the page to see your **Account Info**.
2) Choose the appropriate location from the **Office** drop-down list.
3) Select **Save changes**.

**Note:** Submittal Exchange can remove addresses upon request.
**Changing/Editing Office Addresses in Submittal Exchange**

When logged into Submittal Exchange, select **Company Account** under your name in the upper right hand corner of your screen, to see your **Company Info**.

**Edit Office Address**

1) Select the appropriate location from the **Office** drop-down list.
2) Enter the new address in the **Address** field.
3) Enter the new city in the **City** field.
4) Enter the new state in the **State** field.
5) Enter the new ZIP code in the **Zip** field.
6) (Optional) Enter phone number and fax number in **Phone** and **Fax** fields.
7) Select **Save changes**.

**Add Office Address**

1) Select the **New** button to the right of the **Office** field.
2) Enter a name for new location in the **New Office** field.
3) Follow steps 2-7, above.

**Controlling Email Notifications**

When logged into Submittal Exchange, select a project and go to the **Project Team** tab.

1) Select the email address for the team member you wish to edit. The **Edit Team Member** page appears.
2) Select or deselect the **Email Notifications** under the **Member Email Settings**, until only the notifications the team member would like to receive are selected.
3) Select **Save**.

- An Architect, General Contractor, or Construction Manager acting as the Project Leader can edit anyone's email settings.
- An Architect not acting as the Project Leader can edit any Design Team member's email settings.
- A General Contractor or Construction Manager not acting as the Project Leader can edit the email settings for anyone in their office as well as any Subcontractor.
- A Subcontractor cannot adjust email settings; contact the General Contractor or Construction Manager to edit email settings.
- An Owner cannot adjust email settings; contact the Project Leader or Submittal Exchange Technical Support.
Deleting and Renaming Files in My Library

When logged into Submittal Exchange, select My Account under your name in the upper right hand corner of your screen. On the Account Info page, select Click to manage your My Library Files. The My Library dialog box appears.

- To delete a file, select the Delete option in the Action column.
  - A confirmation box appears. Select OK and the file will be removed.
- To rename a file, select the Rename option in the Action column.
  - Change the file name in the dialog box provided.
  - Select OK, and the file saves with the new name.

Notes:
- This is a personal option, not a company option.
- The My Library feature is available to store documents in a personal library on Submittal Exchange.

Editing Multiple Team Members

When logged into Submittal Exchange, select a project and go to the Project Team tab.
1) Select team members:
   - If all team members need editing, select all. Doing this will place a check mark in the box for each user.
   - If only a few team members need editing, select applicable team members.
2) Select Edit Selected Users. The Edit Team Members page appears.
3) Select Add or Remove from the drop-down list next to:
   - Logs, choose Select from list, and select logs
   - Sections, choose Select from list, and select sections
   - Categories, choose Select from list, and select categories.
4) Select Done when the edits for each have been completed.
5) Select Add or Remove from the drop-down list next to Email Notifications, then select notifications.
6) Select Save.

How to Adjust the Frequency of Email Notifications

When logged into Submittal Exchange, select My Account under your name in the upper right hand corner of your screen, to see your Account Info.

1) Under Email Settings, email frequency options are:
   - Immediate: This is the default setting. This setting will send emails within 5 minutes of activity on the website.
Preferences/Settings

- **1 hour, 2 hours, 4 hours, or 24 hours** (digest options): These settings will send one notification per period selected. Each notification contains all email activity within that specified time frame.

- **Message Center**: This setting means no automated notifications based on activity on the website will be sent to your email inbox. Instead, messages be held within the Message Center link on Submittal Exchange.

  **Note**: The frequency option will apply to all projects you are involved with on Submittal Exchange.

2) (Optional) Expand the **Change Settings for Individual Projects** section to adjust the timing for individual projects.

   - The same email frequency options are available in a drop-down list.
   - Projects set to the same frequency will be contained within one email.

3) Choose **Reminders**.

   - Submittal Exchange sends reminders for upcoming or past due items that need your attention.
   - Select the days of the week to receive these reminders.

4) Select **Save changes**.

### How to Set Submittal Turn-Around Time on a Project

When logged into Submittal Exchange, select a project and go to the **Preferences** tab.

1) Scroll down to the bottom of the page.
2) In the **Required Item Turnaround** field, enter in the desired number of turnaround days.
3) Use the drop-down list to select **Business** or **Calendar** days.
4) Select the gray **Save Changes** button.
5) Select **OK** when the **Settings updated successfully** dialog box appears.

**Note**: If this setting is selected, the system sends reminder notifications when the due date has passed and the action has not been taken. Reminder emails are sent daily after the due date passes until the item is reviewed.

### How to Update the Displayed Project Number to Your Internal Project Number

When logged into Submittal Exchange, select a project and go to the **Preferences** tab.

1) Scroll to the bottom of the page and locate your company settings area.
2) In the **Internal Project Number** field, enter your company specific number.
3) Select the **Save changes** button.

**Note**: This changes the project number at the top of the Submittal Exchange page. This number will appear only for people in your
company.
# How To/Functions

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What is an Archive?

A project is archived when:

- All files that must be uploaded have been uploaded.
- All files that must be reviewed have been reviewed.
- The project is ready to be removed from the website.

An archive is a copy of the project information you view when looking at each page.

This includes:

- All files that you see when viewing each log.
- The dates and action codes surrounding those files.
- The project team.

The Project Leader completes the archive process on Submittal Exchange.

**Note:** For all other requests, contact Submittal Exchange Technical Support.

What is the Discussion Forum?

The **Discussion Forum** on Submittal Exchange allows commenting and discussion about an item without changing the document itself.

1) When the **Discussion Forum** is enabled, a gray comment icon appears to the left of every item description within the log.

2) This feature is set up when creating the log.
   - Comments and replies can only be made if a user's role allows it.

**Notes:**

- If the discussion icon is gray, no comments have been made on the item.
- If the discussion icon is red, there is a comment on the item with no response.
- If the discussion icon is green, all comments have at least one response.

What is the Form Editor?

Use the **Form Editor** button when you have requested Submittal Exchange to set up your company's forms on the system. Typical company forms may include Transmittal Covers and Requests for Information (RFI).

The Submittal Exchange system can automate a portion of the information on the form. Forms are created as PDFs, and you can attach PDF files when using the **Form Editor**.
If you would like to replicate your company forms on the system or if you would like to use one of our standard forms, please email an electronic version of the forms to your Client Relationship Consultant (CRC) at Submittal Exchange. Forms can be in a Word Document, Excel Spreadsheet, or PDF file.

**What is the Review Flow for Log Type 3 (RFI Log)?**

When logged into Submittal Exchange, select a project and go to the appropriate log. The steps are listed as column headings in the **Display Full Log** view.

1) A Subcontractor can upload the initial RFI document.
   - A Subcontractor can fill out their General Contractor or Construction Manager's RFI form using the Form Editor if the Form Editor is made available.

2) The General Contractor or Construction Manager then reviews the Subcontractor's file. The General Contractor can either:
   - Respond directly to the RFI, sending it back to the Subcontractor with the answer and stopping the item from further review.
   - Upload the reviewed file (with or without changes) and send it on to the Design Team.

3) When a Consultant is involved, the Consultant reviews the General Contractor or Construction Manager files and uploads the reviewed file (with or without changes).
   - Multiple Consultant reviews may be performed within this step if there are more Consultant companies that need to review the same RFI.

4) The Architect then reviews the General Contractor or Construction Manager's file or the Consultant's file, by either releasing the item without further comment or by uploading the reviewed file (with or without changes).
   - The Architect can skip the Consultant reviews altogether, meaning that Step #3 can be skipped entirely. Certain projects may not include Consultants.

5) The General Contractor or Construction Manager then reviews the Architect's file, and releases that file back to their Subcontractors.

6) The Subcontractor downloads the file.

**Note:** A Custom Review column can be added in between the Consultant and Architect review. This often occurs when the Facility Owner is actively involved in the review process.

**What is the Review Flow for the Log Type 4 (RFP Log)?**

When logged into Submittal Exchange, select a project. The steps are listed as column headings in the **Display Full Log** view.

1) A Consultant can upload the initial RFP document.
   - The Architect can also do an initial upload, skipping the Consultant altogether.

2) The Architect then reviews the Consultant's file or uploads a new document. The Architect can:
   - Replace the Consultant's upload.
AND/OR
- Upload their reviewed file (with or without changes).

3) The Subcontractor can review the Architect's file by uploading the reviewed file (with or without changes).
- Multiple Subcontractor reviews may be performed within this step if there are more Subcontractor companies that need to review the same document.

**Note:** Most logs with this review flow do NOT include Subcontractors within the review on Submittal Exchange.

4) The General Contractor then reviews the Subcontractor's file by uploading their reviewed file (with or without changes).
- The General Contractor can skip the Subcontractor reviews altogether, meaning that Step #3 can be skipped entirely.

5) The Project Team can then download the final reviewed file.

What is the Review Flow for Log Type 5 (Posting-Only Logs)?

**Log Type 5** logs do not have a review flow.

**Note:** ASI, Bulletin, or Meeting Minutes are examples of **Log Type 5** or **Posting-Only Logs**.

- This log type is used for logging and distributing information.
  - The ability to post to these logs is set by the Project Leader within the **Preferences** tab.
  - Project team members are able to download the posted documents at their convenience by selecting the appropriate file icons.

What is the Review Flow for the Log Type 8?

When logged into Submittal Exchange, select a project and go to the appropriate log. The steps are listed as column headings in the **Display Full Log** view.

1) An Architect can upload the initial document.
   - The General Contractor can do an initial upload, skipping the Architect altogether.

2) The General Contractor then reviews the Architect's file. The General Contractor can:
   - Replace the Architect's upload.
   
   **AND/OR**
   - Upload their reviewed file (with or without changes).

3) The Consultant then reviews the General Contractor's file by uploading their reviewed file (with or without changes).
   - Multiple Consultant reviews may be performed within this step if there are more Consultant companies that need to review the same document.
Note: Most logs with this review flow on Submittal Exchange do NOT include the Consultants in the review.

4) The Architect then reviews the Consultant's file by uploading their reviewed file (with or without changes).
   - The Architect can skip the Consultant reviews altogether, meaning that Step #3 can be skipped entirely.
5) The Project Team can then download the final reviewed file.

**Adding Phases to Expected Items**

Note: If the Phase column is not visible in the Display Full Log view, contact your Client Relationship Consultant (CRC) to set up this feature.

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.
1) Select a section, and click Edit below the Expected items in this section box to the right.
2) Enter the appropriate phase for each item.
   - **Note:** Each phase that you enter must match the phase abbreviation in the Preferences tab.
3) Select Save.
4) Repeat for each section.
5) Navigate to the Display Full Log view to ensure that each Expected Item falls under the correct phase.

**Adding Punchlist Comments**

When logged into Submittal Exchange, select a project and go to the Punchlist log.
1) In the left column click Edit.
2) Underneath the Comments column a box appears where you can add your comment.
   - **Note:** Your role determines when you can add a comment. Subcontractors can only add a comment during their review. Architects and General Contractors can add comments at any time.
3) Once you have added your comment, you can change or update other columns.
4) In the left column select Update. The comment is saved and appears in the Comments column.

**Can I Upload More Than One File to One Submittal Line Item?**

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the Submittal line item to which you need to upload a file.
2) Select the green upload arrow in the Upload column. A dialog box appears.

**Single File**

Select one non-PDF file.

1. Select the Browse button to upload a file. A dialog box appears. It says, **Only PDF files automatically combine into one file. Other file types upload individually.** This is simply a reminder.
2. Choose the file. Select Open. The Submittal Exchange dialog shows the file name.
3. Select Save.

**Multiple Files**

Select multiple PDF files for one submittal line item, which are combined into one large PDF file once uploaded.

1. Select the Browse button to upload a file. A dialog box appears. The Submittal Exchange dialog shows the file name.
2. Choose multiple documents by holding down the CTRL key on your keyboard as you choose the documents.

   **Note:** If you need to remove one of these PDF files after you have selected it, select the red X next to the file name, and it will be removed.

3. Select Save.

**Zip File**

Select a Zip file.

1. Select the Browse button to upload a file. A dialog box appears.
2. Choose the Zip file. Select Open. The Submittal Exchange dialog shows the file name.
3. Select Save.

   **Note:** This is helpful if you need to upload more than 10 PDFs to one line item. You can zip as many PDF files as you want as long as they are all in one Zip file. You can also zip different file types into one Zip file and upload it; for example, a Zip file might include a PDF and Word document.

---

**Notes:**

- Submittal Exchange has a 100 MB size limit for files uploaded to a single line item.
- If experiencing an error when uploading multiple files to one line item, it is likely due to the security settings on one of the individual files being uploaded. Each individual file must have no security settings in order to upload correctly.
Completing a Punchlist Item

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select **Edit** in the left column.
   - The line item will expand.
   - The items you can edit will display within text fields.

2) Once you have reviewed the item, select **Completed** from the drop-down list under the Item Status column.

3) (Optional) Add comments that pertain to the punchlist item in the field under the Comments column.

4) In the far left column select **Update**, the page refreshes. The completed status appears underneath the Item Status column.

**Note:** Only team members with certain permissions can mark a punchlist item as complete. Marking an item as complete means it is 100% corrected and requires no additional action.

Deleting a Submittal Item

When logged into Submittal Exchange, select a project and go to the Submittal Log.

1) Select the **Display Summary** view.

2) Select the description of the item to be deleted. A dialog box appears, detailing information about the submittal.

3) Select the **Delete** button. The system prompt **Are you sure you want to delete this submittal?** If you want to delete the submittal entirely, select **OK**.

4) After selecting **OK**, indicate the reason for the deletion and select **Delete**.

5) The system refreshes and the deleted item is removed from the project. An email notifies the Project Leader of the deletion.

**Notes:**

- Only General Contractors or Construction Managers, Architects, and Project Leaders on Submittal Exchange have can delete.
- When an item is deleted, it is moved to the Deleted Items filter.
- If an item has been inadvertently deleted, you can retrieve the item by going to the Deleted Items filter. Select the description of the item you deleted, and select **Undelete**. When an item is undeleted, it returns to the project and section from which it was initially deleted.

Moving Items from One Log to Another

When logged into Submittal Exchange, select a project and go to the log from which you want to remove the item.
1) Select the blank space directly to the right of the item to move. Doing so highlights the item in yellow. Choose multiple items by holding down the CTRL key on your keyboard as you choose the items.

2) Right click on the highlighted area. A list of options appears.

3) Select the Move option. A Move items dialog box appears.

4) Use the Move to log field to select the log to which the item should move.

5) Use the Move to Section field to select a section.

Notes:
- If you selected multiple items to move, you should only choose a section if all items are moving to the same section.
- If you selected multiple items to move, when you choose Move to same section(s) the items will move to the selected log. Each item will bring its current section assignment with it.

6) Select Save. The dialog box closes and the item no longer appears in the log.

---

**Editing an Item Pending Review in the Punchlist Log**

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select Edit in the column to the left.
   - The line item will expand.
   - The items you can edit will display within text fields.

2) Edit these items by updating the text fields.
   - If the text field has a drop-down list, select the arrow and choose from those options.

3) Once updates are complete, select Update in the column to the left. Your edits will then display in the log.

---

**Emailing a Team Member from the Project Team Tab**

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select the name of the team member to whom you wish to send an email.

2) Select Email Selected Users above the first table or select Send Email in the Email Notifications column.

3) A new message window from your email provider will appear. The team members selected will display in the To field of the message.

4) Fill out the Subject. Enter your message into the body of the email then select Send.

Notes:
- This option does not work if your internal email software is Lotus Notes.
- Email providers have limitations on the number of characters allowed within the To field of emails. If you have used too many characters,
you will receive a warning telling you: **We are unable to email this many team members at one time. Please deselect some users and send multiple emails.** Make the necessary adjustment to send the email.

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**External Tools**

### Using Adobe Acrobat Flattening Tool

Acrobat supports flattening, but it is not included in the default menus. A JavaScript program is needed to enable the feature. Follow these steps to enable the feature:

1) Exit from Acrobat if it is open.
2) Find the `flatten.zip` file.
   
   **Note:** The zip file is included in the Submittal Exchange Knowledgebase. Search the Knowledgebase at [https://www.submittalexchange.com/help/KB.aspx](https://www.submittalexchange.com/help/KB.aspx) for Flattening tool.

   3) Open the `flatten.zip` file.

   4) Save the `flatten.js` file to the JavaScripts folder in the Acrobat directory on your computer.
      - If you have Acrobat 7.0, the directory is `C:/Program Files/Adobe/Acrobat 7.0/Acrobat/Javascripts/`.
      - If you have a different version of Acrobat, the version number will change as needed.

   5) Restart Acrobat.

   6) There will now be a new menu item on the **Document** menu in Acrobat, **Flatten PDF**. Select **Flatten PDF** when you have a PDF open. All the comments and markups are flattened into the content of the file, so they cannot be changed or removed.
      
      **Note:** This should only be done after you are 100% complete with your markups.

   7) After you have flattened a PDF, select **Save**.

**Notes:**

- PDFs are flattened by default, when uploaded to Submittal Exchange.
- We have tested the **Flatten PDF** feature in both Acrobat 7.0 and 8.0. It should also in theory work for older versions as well (for example, 6.0), however that version has not been tested.

### Checking PDF File Security

Verify PDF security settings in Adobe Acrobat. These settings typically are set when the file is originally created. Settings are created with Acrobat Pro or Standard (not Reader).
1) Open the PDF in question with a PDF tool (Adobe Acrobat Reader, Standard, Pro or equivalent).
2) Go to the top right corner and select the **File** menu.
3) Select **Properties**. A dialog box appears.
4) Select the **Security** tab.
5) Review **Document Security** and **Document Restrictions Summary** to find features **Allowed** or **Not Allowed**.

**Note**: Submittal Exchange's form editor and multiple file merging tools require that the PDF allow **Document Assembly** and **Changing the Document**. If **Not Allowed**, Submittal Exchange will simply upload the first document in the submittal.

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### Creating a Zip File

Zipped files are significantly smaller than unzipped files and allow you to combine multiple files into one single file.

**Create a Zip File**

1) Select the **Start** button on your computer.
2) From the **Windows Explorer** view, select the directory location of the files.
3) Hold down the CTRL key and select the files you want to include in the zip file. Release the CTRL key when you have selected all the files to include in the zip file.
4) Right click on highlighted files.
5) Select **Send To->Compressed Zip** file.

This will create a zip file in the location of the original files.

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### Downloading Dropbox

1) Go to **www.Dropbox.com**
2) Select **Download Dropbox**.
3) Select **Run to run Dropbox installer**.
4) Select **Yes** to allow changes.
5) Follow set up instructions.
6) Select **I do not have an account** and select **Next**.
7) Fill out account information, read, and select **I have read and agree to the Terms of Service**.
8) Select Dropbox size.
9) Choose set-up type and select **Install**.
10) (Optional) Watch tour or skip it.
11) Select **Finish**.
How to Clear Browser History and File Cache Outside Internet Explorer

**Note:** These steps only apply to users with using a Windows operating system.

1) Select **Start** in the lower left hand corner of your screen.
2) Select **Control Panel**.
3) Select **Internet Options**. An **Internet Properties** window appears.
4) In the **General** tab, the middle of the window has a section called **Browsing history**.
5) Select **Delete**. A **Delete Browsing History** window appears. It shows six browsing history options:
   - Temporary Internet Files
   - Cookies
   - History
   - Form data
   - Passwords
   - InPrivate Filtering data
6) Select all the browsing history options that must be deleted.
7) Select **Delete**.
   Depending on how long it has been since the history was cleared, a new dialog box may show progress bar. Deleting the browser history could take anywhere from a few seconds to a few minutes. The window disappears automatically when the history is deleted.
8) Close the **Delete Browsing History** window and close the **Internet Options** window.

How to Update Java

Java is a necessary application in order to use Submittal Exchange’s PDF Editor.

2) Select the file for your operating system.
3) Follow the directions given by the site to install the latest version of Java.

You may need to restart your computer after you have completed the installation steps to enable the Java.

**Note:** The newer version of Java requires both the 32-bit and 64-bit versions to be installed on a 32-bit computer.

Not Receiving Emails from Submittal Exchange

To ensure that you receive email notifications that are being sent, please do the following:
1) Add Submittal Exchange to your safe-sender/allow list (more commonly called your whitelist) on all company firewalls. Your IT consultant may need the following information to add Submittal Exchange to the whitelist:

- **Email Account** (may only need to add the domain):
  notifications@submittalexchange.com
- **IP Address**: 50.16.187.18
- If Submittal Exchange is already on your whitelist, but the emails are not received it's possible the IP Address was not added along with the email/domain. Adding both the email/domain and IP Address may allow users to begin receiving all emails from Submittal Exchange.

**Note**: You will only receive new notifications, so you will need to wait until a new one is generated. To see notifications that were sent previously, log into Submittal Exchange, and select the **Message Center** on the top right. All notifications that have been generated will appear are included in the **Message Center**.

If you are still not receiving emails after making the suggested adjustments, please contact subex-help_ww@oracle.com or call technical support at 1-800-714-0024, extension 2.

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**Uploading a Stamp to Adobe Acrobat**

To create the stamp:

1) Save the PDF version of your stamp to your computer.

2) Open a new file within Adobe Acrobat software on your computer.
   a. Select: **Tools > Comments > Stamp Tool > Create Custom Stamp.**
   b. Select **Browse** to locate and select your PDF stamp file.
   c. Select **OK**.
   d. In the **Category** field, select **Dynamic** for the stamp and name your stamp.
   e. Select **OK**.

Your stamp has now been saved in your Adobe Acrobat tools and is ready for future use.

To use this stamp:

1) Open the document in Adobe Acrobat.
   a. From the toolbar select: **Tools > Comments > Stamp Tool > Dynamic**.
   b. Select **Your stamp**.
      Locate your stamp and click on it.
      Place your stamp on the document. Resize your stamp as needed.
   c. Save the file for future use.

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**Uploading Files to My Library from Dropbox**

When logged into Submittal Exchange, select your name in the top right hand corner of the page, and select **Manage My Library.**
When logged into Submittal Exchange, select **My Account** under your name in the upper right hand corner of your screen, to see your **Account Info**.

1) On the **Account Info** page, select **Click to manage your My Library Files**. The **My Library** dialog box appears.

2) Select **Choose from Dropbox**. A **Dropbox** dialog box appears. Allow Submittal Exchange to connect with your Dropbox.
   - Import.
   - Sign into Dropbox.

3) Select the file or files you wish to import.
   - Select **Copy files to my Library**.

Once the import is complete, close the window. This item is now available in your library for future uploading.

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**Note:** The **My Library** feature is available to store documents in a personal library on Submittal Exchange.

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### Uploading to Hightail

You can access the **Hightail Upload** screen in one of the following ways:

1) If you are not logged in to Submittal Exchange:
   - Go to the Submittal Exchange website [www.submittalexchange.com](http://www.submittalexchange.com).
   - Select the **Upload Project Manual** link in the bottom right-hand corner.

2) If you are logged into Submittal Exchange:
   - Select on the **Help** link at the top right of any page in Submittal Exchange and select **Support Home**.
   - From the **Support Home** tab, select the link under **Upload Specifications** for a **New Project**.

3) The icon noted **Upload Specifications/Project Manual** or **Send It** will take you to the following URL: [https://www.hightail.com/u/SubmittalExchange7110897](https://www.hightail.com/u/SubmittalExchange7110897)

4) Complete the following:
   a. Enter Name, Email Address, Subject, and Message.
   b. Select a file to upload from your computer by using **Browse**.
   c. Once you have located the file to upload, select **Open**.
   d. Once all files to upload are selected, select **SEND IT**.

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### What is a PDF Printer/Converter?

A PDF Printer/Converter is a free, external tool that converts any file type into a PDF.

- A PDF Printer/Converter converts your current documents of any type into PDF format.
It acts like a virtual printer; you print a document as if you were sending it to a normal office printer, but the PDF printer saves it as a PDF file instead.

- It works with any program that would normally allow you to print (i.e., word processors, spreadsheets, internet browsers, CAD files, or any other type).
- Please keep in mind that there are many varieties of PDF converters and printers available online, and PDF995 is one good, free option.

### How to Download/Install a Free PDF Printer/Converter

2. Select Downloads towards the top of the screen.
3. Download the Pd995 Printer Driver.
   - Select the Run option to install within the File Download dialog box.
4. Download the free converter.
   - Select the Run option to install within the File Download dialog box.
5. This will place an additional printer in your computer’s available printers.

   **Note:** This is one of many PDF printer/converters available.

### How to Use a PDF Printer/Converter

1. Open the document that needs to be converted to a PDF.
2. Use the Print command just like you normally would in any program.

   **Note:** The File > Print drop-down menu is a common method.

3. In the print options, select the PDF printer you have installed, and select Print when ready. A newly created PDF will be "printed" to your screen, which you can save to your computer.

   **Note:** If you are using a free converter, you may see advertisements display on your screen. This happens because the software is free. It should not watermark or affect your PDF document.

### What are the Recommended Browsers for Submittal Exchange?

- Submittal Exchange functions best when using Internet Explorer or Mozilla Firefox.
- Submittal Exchange has multiple functionalities that use Java. For these to work, a user needs to be in a Java compatible browser.
- Submittal Exchange is developed for use in the current version of, and 2 previous versions of, Internet Explorer and Mozilla Firefox.

   **Note:** Submittal Exchange works in other internet browsers, but some functionality may not be available.
What Kinds of Files Can Be Uploaded to Submittal Exchange?

Any user has the ability to upload virtually any type of file with the following exceptions:

- The file cannot be an executable file, meaning the file cannot have a .exe on the end of the file name. These types of files are essentially computer programs, so these would not be appropriate to upload to our document sharing site.
- You cannot upload a hyperlink to another website into the Browse box.

**Notes:**

- PDFs are the most common file type on Submittal Exchange, because they can be viewed with widely available software.
- When uploading more unique file types, such as DWF or REVIT files, please be conscious of the fact that the rest of your project team may or may not have the necessary software available to view these file types.

Why Won’t Files Upload? (Common Reasons)

- The file must be uploaded from your computer.
  The file must be saved on your computer or accessible on a network through your computer.
- The file is too large.
  - File size is limited to 100 MB.
  - If you are scanning a document, set your DPI to 150-200.
- Security settings on PDF. To check security settings:
  1. Open the PDF.
  2. Select Properties under the File menu in the top right corner of the PDF. A dialog box appears.
  3. Select the Security tab. If anything within this tab says Not Allowed, the file may not upload.
- Uploading multiple file types to one submittal.
  - When submitting PDFs, you can upload up to 10 files.
  - When submitting any other file type, you can only upload 1 document.
- Using the Form Editor.
  You can only attach PDFs when using the Form Editor in Submittal Exchange.

Generating Reports - Items Needed

The Items Needed report shows any expected items that have yet to be submitted in specific logs in Submittal Exchange.

When logged into Submittal Exchange, select Reports in the upper right hand corner of the screen to run a report.

1) In the Project field, select the project on which you need a report.
2) In the Log Type field, select the log.
3) In the Built-In area, select **Items Needed**. Report-specific sections appear.
   - Further narrow your report criteria by selecting your date preferences using the Filter and Recent Activity drop-down lists.
   - Use the Sort By drop-down list in the Sort section to sort the report by the columns available in the current log.
4) Once you have selected the appropriate criteria, select **Save as Defined Report** to save this report as **Custom**, or choose **Run Report**.

**Notes:**
- **Save as Defined Report** allows you to name and save the generated report in the Saved area. It will then be available anytime you open the Reports page for this project.
- **Run Report** generates the report in a new page. Select **Print** (printer icon near the top of this page) OR select **Export** (computer disc icon near the top of this page) to save this on your computer or network in Excel.

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**Generating Reports - Open Items**

When logged into Submittal Exchange, select **Reports** in the upper right hand corner of the screen to run a report.

1) In the Project field, select the project on which you need a report.
2) In the Log Type field, select the log.
3) In the Built-In field, select either **Print Project Log** or **Export Project Log to Excel**. Report-specific sections appear.
   - The new sections present several sorting and filtering criteria for the report. Under Report Type, select **Open Items**.
   - An Output Format section is included.
4) Once you have selected the appropriate criteria, select **Save as Defined Report** to save this report as **Custom**, or choose **Run Report**.

**Notes:**
- **Save as Defined Report** allows you to name and save the generated report in the Saved area. It will then be available anytime you open the Reports page for this project.
- **Run Report** generates the report in a new page. Select **Print** (printer icon near the top of this page) OR select **Export** (computer disc icon near the top of this page) to save this on your computer or network in Excel.
Generating Reports - Punchlist Log

When logged into Submittal Exchange, select **Reports** in the upper right hand corner of the screen to run a report.

1) In the **Project** field, select the project on which you need a report.
2) In the **Log Type** field, select the Punchlist log.
3) In the **Built-In** field, select either **Print Project Log** or **Export Project Log to Excel**.
   - The new sections present several sorting and filtering criteria for the report.
   - An **Output Format** section is included.
4) Once you have selected the appropriate criteria, select **Save as Defined Report** to save this report as Custom, or choose **Run Report**.

**Notes:**
- **Save as Defined Report** allows you to name and save the generated report in the Saved area. It will then be available anytime you open the Reports page for this project.
- **Run Report** generates the report in a new page. Select **Print** (printer icon near the top of this page) OR select **Export** (computer disc icon near the top of this page) to save this on your computer or network in Excel.

Generating Reports - Reviewed Items

The **Reviewed Items** report shows any items that have been completely reviewed in a selected log.

When logged into Submittal Exchange, select **Reports** in the upper right hand corner of the screen to run a report.

1) In the **Project** field, select the project on which you a report.
2) In the **Log Type** field, select the log.
3) In the **Built-In** field, select either **Print Project Log** or **Export Project Log to Excel**.
   **Select Print Project Log**
   - In the **Report Type** drop-down list under the **Options** section, select **Reviewed Items**.
   - Further narrow your report criteria using the other drop-down lists under the **Options** section.
   **Select Export Project Log**
   - In the **Items Viewed** field, select either **My Activity** or **All Activity**.
   - In the **Report Type** field, select **Reviewed Items**.
   - Further narrow your report criteria using the other drop-down lists under the **Options** area.
4) Select a column name in the **Sort By** drop-down list under the **Sort** section to sort the report by the columns available in the log.
   - Use the **Order** drop-down list to select the sort order.
5) Once you have selected the appropriate criteria, select **Save as Defined Report** to save this report as **Custom**, or choose **Run Report**.

**Notes:**
- **Save as Defined Report** allows you to name and save the generated report in the **Saved** area. It will then be available anytime you open the **Reports** page for this project.
- **Run Report** generates the report in a new page. Select **Print** (printer icon near the top of this page) OR select **Export** (computer disc icon near the top of this page) to save this on your computer or network in Excel.

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### How to Adjust the Number of Punchlist Items in the Punchlist Log

When logged into Submittal Exchange, select a project and go to the **Punchlist** log.

Underneath the **Collapse All** | **Expand All** views, a drop-down list includes **50**, **100**, **250**, or **All** options.

- **50** shows 50 punchlist items.
- **100** shows 100 punchlist items.
- **250** shows 250 punchlist items.
- **All** shows all punchlist items.

**Note:** Once you have selected a number from the drop-down list, the number of items in the Punchlist log will remain constant unless changed again.

---

### How to Delete a Photo Gallery

When logged into Submittal Exchange, select a project and go to the appropriate log.

If you are the owner of the gallery or uploaded the gallery:

1) Select **Edit** to the right of the gallery name.
2) At the top right corner of the gallery photos, select **Edit gallery settings**.
3) Select **Delete**. A dialog box appears.
4) Select **Ok** within the dialog box to permanently delete the entire gallery of photos from Submittal Exchange.
Notes:
- If a photo gallery is deleted, it is removed from the website. It cannot be recovered.
- If you are not the owner of the gallery, please contact the owner to remove gallery.

How to Download Photos

When logged into Submittal Exchange, select your project and go to the Photos log.

1) Select Download Multiple Files. The Download Multiple Files page appears.
2) Select the Galleries that include the photograph files you want to download.

   Note: All the files in the selected galleries are included in the download.

3) Select Download Now. You will receive an email when the download completes. The email includes instructions for downloading and extracting photos from a ZIP file.

   Note: The download process runs every 30 minutes. The system does not allow you to download more files before your first request completes.

How to Set Turn-Around Time on a Specific Log

When logged into Submittal Exchange, go to the Preferences tab.

1) In the Project Logs field, select the log for which to set the turnaround time. The Edit Log Settings dialog box appears.
2) In the Turnaround drop-down either:
   - Select Project Default - The default is the Required Item Turnaround on the Preferences tab.
   - Select Other - Two drop-down fields appear next to the Turnaround field. Select the number of days in the first field and choose between Business or Calendar days from the second.
3) Select Save.

   Note: This will set reminder notifications for the selected calendar days or business days. A reminder will be sent a day prior to the due date and daily thereafter until an item is reviewed.

How to Use Budget Columns

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the description of the item to which you need to add the budget information. A dialog box appears.
2) Select **Edit item detail** or **Edit Detail** in the top right corner.
3) Enter the amount.
4) Select the **Status**.
   - Approved
   - Not Approved
   - Pending
   - Under Review
   - Budgeted
5) Select **Save Budget Details**.

Note: Based on the amount and statuses entered, the total calculates at the top of the log.

---

### How to Use the Discussion Forum

When logged into Submittal Exchange, select a project and go to the appropriate log.

To add a comment:
1) Select the discussion icon to the left of the **Description**.
2) A dialog box presents a text box to enter comments. After comments have been entered, select **Add Comment**.
   - Adding comments changes the color of the discussion icon and adds an additional red icon indicating a comment has been added. Everyone that has access to the category or section sees all comments and responses.

To respond to a comment:
1) Select the discussion icon to the left of the **Description**.
2) Select the comment to which you are responding. The dialog box changes.
3) Enter a reply.
4) Select **Save Reply**.
   A notification email is generated to the original authors when a reply has been made to their comment.

**Notes:**
- If the discussion icon is gray, no comments have been made on the item.
- If the discussion icon is red, a comment on the item is awaiting a response.
- If the discussion icon is green, all comments on the item have at least one response.
How to Use Sort Options in the Punchlist Log

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select any of the column titles to sort the Punchlist log by that column.
   - Select the same column title again to reverse the sort order.

2) Filter options are in the right hand corner of the page.
   - Four options are available to refine the display of the log.
   - Select the Filter to sort by. The page refreshes and only displays items that meet the Filter criteria.

   **Note**: The Filter remains selected for this log. To reset the filter or see all information associated within this log, change the Filter to None.

Rejecting the Final Reviewer's Response

If the final reviewer's response to an item is not acceptable, it can be returned to the reviewer. When logged into Submittal Exchange, select your project, go to the Project Logs tab, and select the appropriate log.

Select the Return link under the Returned to Subs column. A dialog box appears. From the dialog:

1. Verify Submittal Number, Description, and Date item was returned fields.
2. Add comments for the Final Reviewer to be included in the email notification.
3. (Optional) Attach documentation.
4. Select Reject Response.

An email is sent to the final reviewers assigned to the section and category. Comments entered in the dialog section are included in the email. The reviewer's previous status is removed from the log. The reviewer must upload a new review.

Reviewing Upload History

When logged into Submittal Exchange, select Company Account under your name in the upper right hand corner of your screen to see your Company Info or select My Account under your name in the upper right hand corner of your screen, to see your Account Info.

1) Select the Upload History tab.
2) Select Show Detail.
   - The upload history for the last three months displays.
   - The date, time, and user who uploaded to each project is included in the table.

   **Note**: You can only review upload history for your company's documents.
Seeing the History of Punchlist Notifications

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select Email Options above the log.
2) Select Show History.
   - Select the plus button to the left of the Date, Recipients, or Message Content to view additional information.

Sending a Submittal via Email

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the blank space to the right of the item to which you want to send a link. Doing so highlights the item in yellow.
2) Right click on the highlighted area. A list of options appears.
3) Select the Email option. An Email Link dialog box appears. Either:
   - Use the Email Link dialog box to enter an email address.
     Note: If you enter email addresses for people who don't have a Submittal Exchange account, they will be presented with the Submittal Exchange Terms of Use. Non-users must agree to the Terms of Conditions to download items.
   - Select from a listing of all the members on your project team. Hold down the CTRL key on your keyboard as you select multiple team members from this list.
4) (Optional) Select Copy me on the email to send a copy to yourself.
5) (Optional) Add comments to go with the email. Text entered in the Comments field appears in the body of the email.
6) Select Send email. This sends an email with a link to the most recent PDF file of the item selected.

   Note: You may only use this function on sections/categories listed within My Activity.

Sending All Updates for Punchlist Items

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select Email Options. A Punchlist Log -- Email Options area appears.
2) Select Send All Updates.
   - Below the Email Options, a Messages section shows when the last email was sent and how many items have been updated since that notification.
3) Select Send.

   Note: This feature is available only to General Contractors, Architects or Project Leaders.
Sending Select Activity for Punchlist Items

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select Email Options above the log header. A Punchlist Log- Email Options area appears.
2) Select Send Select Activity.
3) Select the items about which you want to send emails.
4) Select the users to whom you want to send emails.
   ▸ Add Additional Comments as needed.
5) Select Send to send the email.

Notes:

- At least one item must be selected to Send Select Activity.
- Only General Contractor, Architect and Project Leaders can send out select activity within email.

Uploading a Photo Gallery

When logged into Submittal Exchange, select a project and go to Photos log.

1) Select the green Upload new gallery arrow which is displayed directly above the category column. The Add New Gallery page appears.
2) Complete the following information:
   ▸ Gallery Name
   ▸ Category (automatically populated)
   ▸ Description
   ▸ Gallery Owner (automatically populated)
3) Select Save. A Java application launches and a dialog box appears.
4) Browse for photos to upload.
   ▸ An entire folder of photos can be uploaded at one time.
5) Select the green upload arrow to your upload selected photos. An email notification is sent that includes links to the uploaded files.

Note:

- Only double-click on an item if you want to upload all.
- Photos must be saved as JPEG of GIF files.
- Files cannot be uploaded from email; they must be saved on your computer.
- Shortcuts will not work. You need the direct path to the location of the photos.
Uploading Files to My Library from Your Computer

When logged into Submittal Exchange, select Manage My Library under your name in the upper right hand corner of your screen.

A My Library dialog box appears.

1) Select Choose from Computer. The dialog box changes.
2) Select Browse and upload your file. The file name displays in the dialog box.
   ▶ Repeat this step as needed.
3) Select Upload Files. This item is now available in your library for future uploading.

   Note: The My Library feature is available to store documents in a personal library on Submittal Exchange.

Uploading to a Design Log

When logged into Submittal Exchange, select a project and go to Log Type 6.

1) Select the green upload arrow next to the category to which you are uploading. A dialog box appears.
2) Either:
   ▶ Drag-and-drop files into the gray upload area
   ▶ Hold down the CTRL key on your keyboard to select multiple files to upload.
   Once the files appear in the upload window, they will be listed individually.
3) (Optional) Adjust the category for each by selecting from the Category drop-down list.
4) (Optional) Update the Description.

   Note: When first uploaded, the Description is the file name.
   ▪ You can change the description.
   ▪ You can add remarks.
5) Select Save to upload the files to the log.

   Notes:
   ▪ File sizes affect the amount of time it takes to complete the upload process.
   ▪ Each file is uploaded.
   ▪ Each uploaded document generates an email.

Uploading to the Punchlist Log

Yes

When logged into Submittal Exchange, select a project and go to the Punchlist log.
1) Select the green upload arrow next to the item to which you are uploading. A dialog box appears.
2) Select **Browse** and locate the file on your computer.
   - Once the file is located, select **Open**. The file name appears in the dialog box.
3) Select **Save**. The file appears in the **File** column of the **Punchlist** log.

### Using the Form Editor on Submittal Exchange

**Note:** If you use the PDF Editor tool integrated into Submittal Exchange, be sure to select **Form Editor** first.

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the green upload arrow next to the category to which you are uploading. A dialog box appears.
2) Fill out the pertinent information for the upload. If there is a form on the system, there will be a **Form Editor** icon next to the **Browse** button.
3) Select the **Form Editor** icon. A dialog box appears.
4) Fill out the fields for the form.
   **Note:** If you would like to preview what the form will look like select the **Preview** button.
5) (Optional) To add supporting PDF documents to the form, go to the bottom of the dialog box and locate the **Browse** button.
   - Locate the file on your computer and select **Open**.
   **Note:** You will not be able to browse to emails. If there is a document in your email that you wish to attach, go to your email and save it to your computer's hard drive. Then you will be able to browse to the document.
6) Select **Save** to upload to the log.

**Note:** Forms are customized specifically for each company.
- If you add a form to Submittal Exchange, anyone from your company will have access to the form.
- If you are a General Contractor setting up an RFI form, the Subcontractors on your project will be able to use your RFI form as well.
- If you do not have forms set up on Submittal Exchange yet, contact your Client Relationship Consultant (CRC) and they can work with you to accomplish this.

### Who Has Viewed an Item?

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the description of the item. A detail dialog box appears.
2) In the dialog box, select the item in question.
3) Select Downloads below the uploaded file.
4) A Download History dialog box shows who downloaded the file.

Notes:
- If this is blank, someone viewed the item from a link in an email.
- This option is available for General Contractors/Construction Managers, Consultants, Architects, and Owners.

Who Reviewed an Item?

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the description of the item. A detail dialog box appears.
2) In the dialog box, select the item in question.
3) Select Notification below the uploaded file. A Notification History dialog box appears.
   - At the top right pane of the Notification History, the name of the person who initiated the email notification is listed.

Notes:
- The Notification History dialog box shows everyone who received the email notification.
- The Notification History dialog box includes the View Full Email Here links to view the contents of each email notification.
- This option is available for General Contractors/Construction Managers, Consultants, Architects, and Owners.

Who Uploaded an Item?

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the description of the item. A detail dialog box appears.
2) In the dialog box, select the desired user role.
3) Select Uploads below the uploaded file.
4) An Upload History dialog box shows who uploaded the file.

Notes:
- The Upload History dialog box shows the date and time of the upload in Central Standard Time (CST).
- The Upload History dialog box shows the action codes and remarks if applicable.
- This option is available for General Contractors/Construction Managers, Consultants, Architects, and Owners.
Managers, Consultants, Architects, and Owners.

**Why Can I Only See PENDING on a Line Item?**

When logged into Submittal Exchange, select a project and go to the appropriate log.

**If you are a Construction Team member**

The Consultant's reviewed file will appear as PENDING in the log until the final review by the Architect has been completed. This allows the Architect to review and approve the Consultant comments, markups, and action codes before it is available to the General Contractor/Construction Manager and the Subcontractor. As soon as the Architect's final review is uploaded the Consultant's reviewed file will be available to view and download as well.

**If you are a Design Team member**

The Subcontractor's file will appear as PENDING until the General Contractor/Construction Manager has uploaded their review to the log. This allows the General Contractor/Construction Manager to determine that the Subcontractor upload is correct and complete before passing this information along to the Design Team. Once the General Contractor/Construction Manager has uploaded their review the Subcontractor file will be available to view and download as well.
Project Leaders on Submittal Exchange

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Adding a Category

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select Categories at the top of the box with the sections listing.
2) Select Add New below the box. A dialog box appears, allowing you to enter multiple new categories at one time.
3) Enter the categories and select Save.

Adding a Category to a Log

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select Categories at the top of the box with the sections listing.
2) Select Add New below the box. A dialog box appears, allowing you to enter multiple new categories at one time.
3) Enter the categories and select Save.
4) Go to the Preferences tab, and select the log to which you want to add the category.
   - Select the appropriate boxes for the new category.
5) Go to the Project Team tab, and select team members who require access to the new category.
   - Add the category to their settings.

Note: Team members require access to upload a category or log or receive notifications about documents in a category or log.

Adding a Log

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select Categories at the top of the box with the sections listing.
2) Select Add New below the box. A dialog box appears, allowing you to enter multiple new categories at one time.
3) Enter the categories and select Save.
4) Go to the Preferences tab.
5) Select **Add new** under **Project Logs**. An **Add New Log** dialog box appears.
   - Enter a **Log Name**.
   - Select a **Log Type**.
   - Select the categories needed within the log.

   **Note:** Categories can be rearranged or new categories can be added.
   - Drag-and-drop category name to re-order.
   - Use the **Add New Category** link to create a new category.

6) If new categories were created for the log, go to the **Project Team** tab.
   - Add the new categories to the team members that will be involved with the log.

   **Notes:**
   - Only a Project Leader can add a log.
   - After adding a new log, you will need to edit the Project Team to add the log to individuals that need to see it, upload to it, review it, and receive emails about it.

### Adding Custom Columns to a Project Log

Project Leaders and SE/CSEA Admins can add up to five custom columns to a project log.

**Note:** You cannot add multiple custom columns to Type 7, 9, and 10 log types.

1) Select your project and select **Preferences**.
2) From the **Project Logs** section, select a log.
3) From the **Edit Log Settings** page, under **Custom Columns**, click **Add New Column**.
4) Enter a name, location and select the column type.
5) Select the users who can edit the column.
6) Select the **Include on upload** to add the column when the submittal is being uploaded in logs.
7) Click **Add**.
8) Click **Save**.

### Editing or Deleting Custom Columns

To edit a custom column on a Project Log:

1) Select your project and select **Preferences**.
2) From the **Project Logs** section, select a log.
3) From the **Edit Log Settings** page, under **Custom Columns**, click the **Edit Custom Column** icon next to the column you want to edit.
4) Update the settings.
5) Click **Save**.

To delete a custom column from a project log:

1) Select your project and select **Preferences**.
2) From the **Project Logs** section, select a log.
3) From the **Edit Log Settings** page, under **Custom Columns**, click the **Remove this Column** icon next to the column you want to delete.
4) Click **OK** to confirm the deletion.

**Note:** You cannot change a File Uploader column type to any other type or change other column types to File Uploader.

---

**Adding a New Specification Section**

When logged into Submittal Exchange, select a project and go to the **Sections & Categories** tab.

1) Below the list of current specification sections, select **Add New**.
2) Add specification number and title.
3) Select **Save**.

**Note:** This functionality is only available to Project Leaders.

---

**Adding Expected Items**

When logged into Submittal Exchange, select a project and go to the **Sections & Categories** tab.

1) Select the **Specification** section in the left-hand table. This will display current expected items for that section in the right table.
2) Select **Edit** below the **Expected Items** table (right table).
3) Select standard expected items or enter text in the blank fields. Pre-numbering and required submittal dates can also be set here.

---

**Allowing Teams/Companies to Upload to a Posting Only Log**

When logged into Submittal Exchange, select a project and go to the **Preferences** tab.

1) In the **Project Logs** field, select the log to which the Team/Company should post. A dialog box appears.
2) In the **Who can post** area, select the organization names, the organization types, or the users who can upload to the log.
3) Scroll to the bottom of the window and select **Save**.
Note: Only users who have the categories listed within their settings in the Project Team tab will be able to upload.

**Backing Out an Architects Review**

When logged into Submittal Exchange, select a project and go to the Submittal Log.

1) Select the description of the submittal that needs to be backed out. A dialog box appears.
2) Select Edit detail in the upper right corner.
3) Select Architect Review.
4) Remove the following by highlighting the text and using the delete key on your keyboard:
   - Date returned to General Contractor
   - Action code
   - Remarks, if entered.
5) Change the file type to Hardcopy.
6) Select Return to Subcontractor. Remove the Return to Subcontractor date displayed in this area.
7) Select Save.

**Changing a Section Name**

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select the section you would like to rename.
2) Select the Edit button at the bottom left of the list of sections. A dialog box appears.
3) In the dialog box, make the necessary changes.
4) Select Save.

**Changing a Submittal to a Closeout or a Closeout to a Submittal**

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the part of the submittal you wish to change. A dialog box appears.
2) Select Edit detail at the top right corner of the dialog box. A new dialog box appears.
3) Select the Document type from the item information at the top of the dialog box. You can change the Document type to Submittal or Closeout.
4) Select Save. The entire item is moved from the Submittal to the Closeout log or vice versa, depending upon your selection.

Note: If the Closeout Log is a posting only log (No Review Flow), please contact Submittal Exchange Help or the consultant assigned to your project.
Changing an Expected Item from a Submittal to a Closeout or from a Closeout to a Submittal

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select the section that requires adjustment to the submittals or closeouts. This section number and name are highlighted in blue.
2) Below the box to the right, select Edit.
3) Using the drop-down list to the left of the Item Description, change Submittal to Closeout or Closeout to Submittal as necessary.
4) Select Save.
5) Repeat as needed.

Changing Email Notifications

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select the email address for the team member you wish to edit.
2) Select or de-select the notifications as needed.
3) Select Save.

Changing Log Types

Once a log has been created on Submittal Exchange, a change to the type of a log is not allowed. Instead, a Project Leader is able to create a new log.

When logged into Submittal Exchange, go to the project and select the Preferences tab.

1) Below the list of logs, select Add new.
2) Name the log.
3) Select the type of log.
4) Select categories to include in the log.

**Note:** Before deleting an old log, verify that there are no files within it. If there are existing files, save them all on your local drive so you will be able to upload them to the new log.

5) Upload the new files to the appropriate categories, with the correct dates/information.
6) Once the new log is created with the files uploaded, go into the old log and delete all the files.
7) Email subex-help_ww@oracle.com to request removing the specific log from your project.

**Note:** The new log must be added to all team members, within the Project Team tab, that will need access to the log.
Delete a Section

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select the section to be deleted. If there are expected items listed, be sure to delete them first in the smaller box on the right after selecting the section.

2) Select Delete below the list of Sections. A dialog box appears.

3) Confirm that you want to delete the section. Click Ok if you wish to proceed.

Notes:
- Submittal Exchange will NOT allow you to delete sections if there are current submittals in the section.
- Submittal Exchange will NOT allow you to delete a Section if there are submittals or expected items listed within that section in the Deleted Items filter.

Deleting a Log

When logged into Submittal Exchange, select a project and go to the Preferences tab.

1) Within the list of logs, select the log that needs to be removed. A dialog box appears.

2) Within the dialog box, select Remove from project at the bottom.

Notes:
- Only a Project Leader can delete a log.
- A log cannot be removed from Submittal Exchange if files have been uploaded to the log.
- If there are files currently in the log, go to the log to delete, then follow the steps above.

Deleting Expected Items as a Project Leader

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select the specification section that has submittal/closeout items which need to be removed.

2) Select Edit below the Expected Items table (right table).

3) De-select the expected items.

4) Select Save to remove.

Note: General Contractors or Construction Managers cannot remove expected items in this method, unless they are the overall Project Leader. They can add items, but not remove them.
How a Project Leader Can Add a Custom Column

When logged into Submittal Exchange, select a project and go to the Preferences tab.

1) Select the log that you would like to edit from the list of Project Logs. An Edit Log Settings dialog box appears.

2) Select Show Custom Column. The section expands.
   a. Enter the column name.
   b. Select the location in the log where the column should appear.
   c. (Optional) If the column should show dates, choose the Date Function check box.
   d. Choose which roles or users can edit the columns.

3) Select Save at the bottom of the window.

How a Project Leader Can Edit All Due Dates at One Time

When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Select the red Edit Dates link below the Due Date column.
   - A calendar box appears to the right of the Due Date for each item that is listed as New or Completed by Sub.

2) Select the text box or the calendar icon next to the punchlist item you want to edit.

3) Select the Due Date.

4) Once all due dates have been edited, select the red Done link located under the Due Date column and the due dates will be saved.

How a Project Leader Can Edit Punchlist Status Options

When logged into Submittal Exchange, select a project and go to the Preferences tab.

1) Select the log that you would like to edit.

2) Select the Edit Status Options button below the Log Type.
   - The current Status Options will be displayed.

   **Note**: Any item with a red asterisk is a required item, however you may still edit the text that is displayed.

3) Edit, remove, or add new Status options.

4) If you would like to add additional options, click the +Add Additional Status Options link and type in the text you wish to appear.
   - Select Done, at the bottom of the list when complete.

5) Select Save at the bottom of the window.

   **Note**: Subcontractors will only be able to select the second status option that is available to subcontractors upon their completion.
How a Project Leader Can Edit the Reminder Turnaround for a Punchlist Log

When logged into Submittal Exchange, select a project and go to the Preferences tab.
1) Select the Punchlist log that you would like to edit from the list of Project Logs. A dialog box appears.
2) Locate the Reminder Turnaround area in the middle of the dialog box.
   - The Reminder Turnaround may be set to count only business days or all calendar days.
   - There is no minimum on the number of days you must select.
3) Select Save at the bottom of the window.

Notes:
- Reminder notifications are sent daily, based on this setting while the item is marked as New.
- Only Project Leaders may edit Reminder Turnaround for the Punchlist log.
- Reminders and timeframes for the Punchlist log are separate from other Turnaround time-frames set on the Preferences tab.

How a Project Leader Can Enable or Disable Automatic or Manual Updates for a Punchlist Log

When logged into Submittal Exchange, select a project and go to the Preferences tab.
1) Select the Punchlist log that you would like to edit from the list of Project Logs. A dialog box appears.
2) Below Reminder Turnaround, Update Emails displays in bold.
3) Select the email option needed.
   - Automatic Updates are set to one of three different frequencies described in the log
   - Manual Updates means no automatic emails will be generated from the log activity.
4) Select Save at the bottom of the box.

Notes:
- Only Project Leaders may change Update Emails for the Punchlist log.
- Emails and timeframes for the Punchlist log are separate from any other timeframe set on the Preferences tab or Account Info area for other logs.

How a Project Leader Can Request an Archive

When logged into Submittal Exchange, select a project and go to the Preferences tab.

Note: Prior to a final archive, verify all documents have been uploaded.
that need to be and all documents have been reviewed that need to be.

1) Below the list of logs, select **Request archive**. A dialog box appears.
2) Select the **Log Detail** (views) to include in the archive.
3) Select the logs to include in your copy.
   ▸ Only logs that contain documents are on the list.
4) Select any of the **Additional Options** as needed.
5) Select **Submit request**.

The system sends an email with a link to download a zipped file of your archive.

If you run into any issues while extracting the zip file, go to www.7zip.me to download a free extractor.

**Notes:**
- Additional instructions are in the email.
- If this is a final archive, notify Submittal Exchange to remove the project from the website, to ensure your archive is a true final copy.
- Forward the email to other team members who need a copy of the project information.

**How to Use Bulk User Import to Add Multiple Users to a Project**

Use the Bulk User Import option to add multiple users to a project during project creation. Only Admin or Project Leaders can access this option. You can either manually enter multiple users in the grid, or use an Excel file to import multiple users.

To bulk import users into a project:

1) Select your project and navigate to the **Project Team** tab.
2) Select the **Bulk User Import** option. The **Add User** page is displayed. You can add multiple users from an Excel file or use the grid to add users.
3) To add multiple users using the grid:
   a. Select **Add User**. A new row is added to the grid. For each user, enter the user email, company, role, title for that user.
   b. Double click the row and enter an email address for the user.
   c. Select the drop-down menu under **Company** to select the company the user belongs to. You can also select **New Company** to add a new company. If you select **New Company**, you can enter a name under the **Company Name** column.
   d. From the **Project Role** drop-down, select a role.
   e. Enter a title for the user.
   f. Select **Edit** on the **Logs, Sections**, and **Categories** columns, to make your selection.
   g. Click **Next**. The system validates your entries. Errors or missing information are displayed in red.
4) To add multiple users using the file option:
   a. Select **Upload File**. The **Upload Users via File** page is displayed.
b. Select the Download Template link from Step 1 to download the Excel template that is specific to your project.
c. Follow the instruction on the template to set up your import file.
d. Click Browse and select the import file you updated in Step c.
e. Click Next. The system validates your entries. Errors or missing information are displayed in red.

5) Review and fix the errors displayed under the Errors/Warnings column.
6) Click Verify to confirm the errors have been fixed.
7) Click Next.
8) Confirm your additions and select Save.
9) Select the Email password to individual checkbox to have the system send default passwords to the users you just added to the system.

Tips:
- To edit multiple rows using the grid, use the checkbox to select multiple rows and click Edit Selected.
- To delete a user using the grid, select the gear icon next to each row and select Delete. To delete multiple users, use the checkbox to select multiple rows and click Delete.

How Can I Hide Team Members from Other Team Members?
When logged into Submittal Exchange, select a project and go to the Preferences tab.

1) In the Project Team drop-down list (which is directly above the Project Logs list), select the drop-down arrow.
2) Select Keep team members confidential.
3) Select Save changes directly below the Project Logs list.
4) A dialog box shows Settings updated successfully. Select OK.

Note: This allows only team members from their own company on the project as well as the Project Leader to be visible.

How to Delete a Punchlist Item
When logged into Submittal Exchange, select a project and go to the Punchlist log.

1) Find the Punchlist item that should be deleted.
2) Select Delete to the left of the item that should be deleted. A dialog box appears
3) Confirm that you want to delete the item. Click Ok if you wish to proceed.
4) The system refreshes and the deleted Punchlist item is removed from the project. An email is generated to the Project Leader alerting them of the deletion.
Notes: When a Punchlist item is deleted it will be moved to the Deleted Items filter.

If a Punchlist item has been inadvertently deleted, you can retrieve the Punchlist item by doing the following:

- Go to the Deleted Items filter.
- Select the description of the item you deleted and then select Undelete.

How to Edit a Milestone in Submittal Exchange for Design as a Project Leader

When logged into a Submittal Exchange for Design, select a project and go to the Preferences tab.

1) Select the Project Milestones heading below the list of logs.
2) Select the milestone to edit. A dialog box appears.
3) Change or set the desired fields below:
   - Date of completion of milestone
   - Number of days prior to completion date for Alerts.
4) Select Save.

How to Remove a Team Member from the Project as the Project Leader

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select the team member to be removed.
2) Select Remove Selected Users above the table. A dialog window appears.
3) Select Delete to confirm deletion. The screen refreshes and the team member is no longer included in the project team.

Note: If you are removing a user because the user is no longer employed, please contact Submittal Exchange Technical Support to have their access to Submittal Exchange removed.

How to Renumber Submittals as the Project Leader

When logged into your project on Submittal Exchange, select a project, go to the Submittal Log, and find the appropriate section that needs its number changed.

1) Select the description of the submittal. A dialog box appears.
2) In the upper right hand corner of the dialog box, select the option entitled Edit submittal detail.
3) Highlight the number within the Submittal number text box and change it.
4) Select Save at the bottom of the window. The window will close and your submittal will appear with its new number.
How to Set a Milestone in Submittal Exchange for Design as a Project Leader

When logged into a Submittal Exchange, select a project and go to the Preferences tab.
1) Select Project Milestones below the list of logs.
2) Select the milestone you want to set or edit. A dialog box appears.
3) Within the new dialog box change or set the fields below:
   ▸ Percent of design completion for the project
   ▸ Milestone description
   ▸ Date of completion of milestone
   ▸ Number of days prior to completion date for Alerts.
4) Select Save.

Notes:
- These milestones will appear within each log once the countdown to the due date begins.
- These milestones are visual reminders and do not send email notifications for pending work.

How to Switch Roles on a Project

When logged into Submittal Exchange, select a project and go to the Project Team tab.
1) Select the email address for the user who is currently listed under the incorrect role. An Edit Team Member page appears.
2) Select the correct role from the Project Role drop-down list.
3) Scroll down to the bottom of the Edit Team Member window and select Save.

Note: The Project Team page appears. The team member is listed under the correct role.

How to Undelete an Item

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select Deleted Items from the Filter drop-down list at the top right corner. Only deleted items appear in the log.
2) Locate the item that needs to be undeleted.
   ▸ Select the specific item, below the Description column, you want to undelete.
A dialog box appears.
3) At the bottom of the new dialog box select the **Undelete** button. A dialog box appears.
4) Confirm that you want to delete the item. Click **Ok** if you wish to proceed.
5) The page refreshes, removing the item from the **Deleted** items page.

The item is placed back into the log it was deleted from.

### Moving a Submittal to Another Section

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the submittal that must be moved. (Anything but the file.) A dialog box appears.
2) Select **Edit Detail** in the top right corner. The dialog box changes.
3) Select **Move section** in the top right corner. The dialog box changes.
4) Use the **Move to log** field to select the log to which the item should move.
5) Use the **Move to Section** field to select a section.
6) Select the section under which the item should move.
7) Select **Save**.

The submittal is now moved to the new section.

**Note:** If section sequential numbering is used, the submittal number will adjust to reflect the new section number.

### Rejecting Submittals Back to Subcontractors as a General Contractor or Construction Manager

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the red submittal line item (anywhere on the text, but not on the file icon).
   - A submittal dialog box appears. It includes an area for information received from Subcontractor.
2) Select **Reset** next to the field containing the file.
   - A warning appears, indicating the General Contractor or Construction Manager will be reset as an expected item and the sub must upload a new file.
3) Select **OK**.
4) Enter comments to be included in the email that automatically goes back to the subs. (Required field)
5) Select **Save**. An email is sent to the person who uploaded the initial file and the person resetting the item.

**Notes:**
- Instructions apply when a General Contractor or Construction Manager initially receives a submittal or other item from the
Subcontractor, but has not released it to the design team.

- File history will be stored in item detail, although the most recent file that sub uploads will display in log.

---

### Removing a Category from a Log

1) When logged into Submittal Exchange, select a project and go to the log from which the category should be removed.

2) Make sure there are no documents within the category for the specified log.
   - If there are documents:
     a. Select the description of the item within that category. A dialog box appears.
     b. Select **Edit Detail** in the top right corner of the dialog box.
     c. Select **Move Item** in the top right corner of the dialog box. A new dialog box appears.
     d. Select the category where you plan to move the item.
     e. Select **Save**.
     f. Repeat steps a through e for all items within the category that need to be removed.

3) Go to the **Preferences** tab.
   - Select the log from which a category must be removed.
   - Deselect the category that must be removed.

4) Select **Save**.

### Reordering Categories

When logged into Submittal Exchange, go to the **Preferences** tab.

1) In the **Project Logs** box, select the **Log Name**.

2) In the **Log Box** select the category that you wish to move, hold down your left mouse button, and drag it to the desired location.

3) Select **Save changes**.

**Note:** This task can only be performed by the Project Leader. If you are unable to reorder the categories, please contact your Project Leader.

### Reordering Logs

When logged into Submittal Exchange, go to the **Preferences** tab. Towards the middle of the page is a list of the current logs.

1) Click and drag logs to the desired location.

2) Select **Save changes**.

### Restrict Log Access

When logged into Submittal Exchange, go to the **Preferences** tab.
1) Select the log needing restricted access. A dialog box appears.
2) Select **Restrict Log** Access.
3) Select **Save** at the bottom of the dialog box.

**Notes:**

- Only team members with access to those Sections or Categories will see the information within the log.
- There is no **All Activity** link in these logs. If a team member is listed on only some of the sections or categories within the restricted log, the team member will ONLY see the sections to which they are assigned.
- If the user is not listed on any section or category within that log, then the log is not visible at all from the **Project Logs** tab.
- This task can only be performed by the Project Leader. If you are unable to restrict log access, please contact your Project Leader.

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**Uploading Photos to an Existing Gallery as a Project Leader or Gallery Owner**

When logged into Submittal Exchange, select your project and go to the **Photos** log.

1) Locate the gallery you want to upload and select **Edit Gallery**.
2) Select **+Add New Photo**. An **Add Photo** dialog appears. Either:
   - Drag and drop photos from folders on your computer into the dialog.
   - Select the **Browse** button and locate the file on your computer.
3) Once you have chosen all photos, select **Save**.

**Notes:**

- To delete a photo selected erroneously, select on the red x next to it.
- If you delete photos, they are permanently removed from the project.

---

**Downloading Photos**

To download photos from your gallery to view or share with team members outside of Submittal Exchange:

1) Select your project and go to the **Photos** log.
2) Select a photo gallery that includes the photos you want to download.
3) Click **Download Photos**.
4) Select individual photos or click **Select all** to select the photos you want to download.
5) Click **Download** to download selected photos individually, or click **Download as Zip** to download a zip with all the selected photos.
Uploading Previous Files

When logged into Submittal Exchange you can do the following after selecting a project:

1) Select either the expected item for the item that requires an upload. A dialog box appears.
2) Select **Edit Submittal Detail**.
   - You can change the number or the description if needed.
3) Starting from the top, select the plus symbol next to each role and fill out the information.
   - **Submittal from Subcontractor**: Enter **Date sent to architect**.
   - **Submittal from GC**: Enter **Date received from GC** and what was submitted.
   - **Consultant Review**: Enter **Date Consultant reviewed**. (if applicable)
   - **Architect Review**:
     - Enter the **Date returned to GC**
     - Add the **Action code**
     - Select **Hardcopy** if you returned the submittal in hardcopy form or select **Electronic** to upload your final electronic file.
   - **Return to Subcontractor**: Enter **Date returned to subcontractor**.
4) Select **Save**.

**Notes**:
- These steps will ensure your submittal/RFI numbering lines up with the current and future items. It is also helpful to have these documents in one place to keep a record of them.
- The steps listed above may only be performed by a Project Leader on the team.

Using the Event History as a Project Leader, Filtering by Event Type

When logged into Submittal Exchange, select a project and go to the **Event History** tab.

1) Select the event type for which you are searching from the **Event Type** drop-down list under the **Filter** field.
   - Example: Expected Item Events
2) The system will search for all items that meet your criteria.
3) A list will show all events associated with that type of event.

Using the Event History as a Project Leader, Filtering by User

When logged into Submittal Exchange, select a project and go to the **Event History** tab.

1) Select the user for which you are searching from the **User** drop-down list under the **Filter** field.
   - Example: John Doe
2) The system will search for all items that meet your criteria.
3) A list will show all events associated with that person.

## What are the Automatic Updates Options

When logged into Submittal Exchange, select your project and go to the **Preference** Tab.

1) Select **Punchlist** in the **Project Logs** field. A dialog box appears.
2) Under **Update Emails**, you can select either **Automatic Updates** or **Manual Updates**.
3) If selected, you can choose the frequency of **Automatic Updates**:
   - Daily occurs every day at 6am CST.
   - Weekly occurs every Monday at 6am CST.
   - Monthly occurs on the 1st of the month at 6am CST with the information pertaining to the month prior.
4) Select **Save**.
Subcontractors on Submittal Exchange

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Adding Additional Submittal Items as a Subcontractor

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Navigate to the section to which you need to upload a file.
2) Select the green upload arrow to the right of the section. A dialog box appears.
3) Select Other and then replace the text Other, with the description of the file you are uploading (ex. Material Certificates).
4) Enter the Supplier or Manufacturer information if it is available.
5) Select Browse and upload your file.
6) Select Save.

How to Combine Expected Items as a Subcontractor

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Navigate to the section to which you need to upload a file.
2) Select the green upload arrow to the right of the section. A dialog box appears.
3) Select all items you are submitting within one upload.
4) Enter the optional Supplier or Manufacturer information.
5) Select Browse and upload your files.
6) Select Save.

When the file uploads and the screen refreshes, the selected expected items are combined into one submittal line item.

Notes:

- You should only combine expected items if they are contained within one file.
- If you selected both the Product Data and the Shop Drawings, the new item will appear as Product Data & Shop Drawings.
Removing Users from a Project as a Subcontractor

Subcontractors do not have the ability to remove users, including themselves, from the project team.

Note: If you or someone from your company needs to be removed from your project, please either contact the General Contractor, who has the ability to remove any subcontractor, or contact Submittal Exchange technical support at 1-800-714-0024 ext. 2 or email subex-help_ww@oracle.com.

Uploading a RFI to Multiple Categories as a Subcontractor

When logged into Submittal Exchange, select a project and go to the RFI log.
1) Select the green upload arrow. This will open a RFI: Add New dialog.
2) Under the Category, choose Select multiple.
3) While holding down the CTRL key, select the categories you want to upload to the RFI.
4) Either:
   ▶ Select Browse and upload your file.
   ▶ Select the Form editor.

Note: If you see the Form editor, this is the RFI form your General Contractor would like you to use.

Uploading a Submittal Item as a Subcontractor/Contractor

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the name of the submittal item.

Note: You can select the green upload arrow if your item is NOT listed.

A dialog box appears. It includes:
   ▶ Document type
   ▶ Submittal number
   ▶ Description.
   The submittal number will pre-populate based on project settings.
2) (Optional) Enter your Supplier/Manufacturer.
3) Select Description. If you are using the Other checkbox, add a description of the submittal item.
4) Select the Browse button and locate the file on your computer.
5) Select Save. The system refreshes and uploads the file.
6) The submittal is reflected on the log with the date the file was uploaded.
Notes:

- Prior to uploading a document to Submittal Exchange, ensure it is saved on your computer and you know where it is.
- When uploading PDF files, you are able to upload up to 10 PDF documents. Submittal Exchange will merge them together in the order you have selected.
- You may only upload one file at a time for documents other than a PDFs.

What Email Notification Options are Available to Subcontractors?

**Items Uploaded** - You receive notifications of new uploads for the **Sections & Categories** within which you are listed.

**Reviews Completed** - You receive the notification sent to the General Contractor/Construction Manager when the final review has been completed/posted.

**Reminders** - You receive notifications when **Expected Dates** have been set by the General Contractor/Construction Manager on Submittals/Closeout items and the items have not yet been submitted. Questions regarding these reminders should be directed to the General Contractor/Construction Manager.
Adding Expected Dates

When logged into Submittal Exchange, select a project and go to the appropriate log.

Option 1 - Add all due dates at one time
1. Select the **Display Full Log** view.
2. Within the **Date Expected** column, select the red **Set Dates**. A dialog box indicates all **Section Numbers** within the project and each expected item for the applicable section.
3. Select the **Date Expected** column for the section that needs a date set. A calendar appears. Select your due date.
4. Select **Save**.

Option 2 - Add due dates one section at a time:

1. Select the **Sections & Categories** tab.
2. Highlight the section that needs a date set. The **Expected items in this section** field shows the current expected items.
3. Select **Edit** below the **Expected items in this section** field. A dialog box appears.
4. Select the **Date Expected** column for the item. A calendar appears. Select your due date.
5. Select **Save**.

Repeat for all sections you need to add due dates to.

## Adding Expected Items

When logged into Submittal Exchange, select a project and go to the **Sections & Categories** tab.

1) Highlight the section that needs a new expected item. The **Expected items in this section** field shows the current expected items.
2) Select **Edit** below the **Expected items in this section** field. A dialog box appears.
3) Either:
   - Select standard expected items
   - Enter custom text in the blank fields.

   **Note:** Pre-numbering and required submittal dates can also be set here.

## Backing Out a General Contractor or Construction Manager Submittal Upload

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the submittal that needs to be backed out. A dialog box appears.
2) In the upper right corner of the dialog box, select **Edit detail**.
3) Select the **Submittal from Subcontractor** section.
   - Remove the **Date sent to architect**.
4) Select the **Submittal from General Contractor** section.
   a. Remove **Date received from General Contractor**.
   b. Change the file type to **Hardcopy**.
   c. Remove **Remarks from GC**, if entered.
5) Select **Save**.
Changing an Expected Item from a Submittal to a Closeout or from a Closeout to a Submittal

When logged into Submittal Exchange, select a project and go to the Sections & Categories tab.

1) Select the section that needs submittals or closeouts adjusted. The section number and name are highlighted in blue. Submittals and Closeouts appear in the Expected items in this section field.

2) Under the Expected items in this section field, select Edit. A dialog box appears.

3) Use the drop-down list under the Log column to change the Submittal or Closeout as necessary.

4) Select Save.

5) Repeat as needed.

Combining Multiple Expected Items into One Submittal Line Item When Uploading

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the green upload arrow to the right of the section to which you are uploading. A dialog box appears.
   - If selecting an item in gray, choose Select Multiple to in the Supplier or Manufacturer column to the right of the Description column.

2) Within the dialog box, select each item description to include in your document.

3) Enter the optional Supplier or Manufacturer information.

4) If received from the Subcontractor outside Submittal Exchange, you can:
   - Enter Date received from subcontractor.
   - Select Browse to the right of Received from subcontractor and upload your file.

5) Select Browse to the right of Submittal to architect and upload your file.

6) Select Save.

When the file uploads and the screen refreshes, the items that were selected are combined into one submittal line item.

Notes:
- Only combine expected items if they are contained within one file.
- If you selected both the Product Data and the Shop Drawings, the new item will appear as Product Data & Shop Drawings.

Deleting Expected Dates

When logged into Submittal Exchange, select a project and go to the appropriate log.

Option 1 - To delete all due dates at one time:

1. Select the Display Full Log view.
2. Within the Date Expected column, select the red Set Dates. A dialog box indicates all Section Numbers within the project and each expected item for the applicable section.
3. Delete the date in the Date Expected field for a section.
4. Repeat for each section as needed.
5. Select Save.

Option 2 - To delete due dates one section at a time:
1. Go to the Sections & Categories tab. The section number and name are highlighted in blue. Submittals and Closeouts appear in the Expected items in this section field.
2. Under the Expected items in this section field, select Edit. A dialog box appears.
3. Delete the date in the Date Expected field for a section.
4. Repeat for each section as needed.
5. Select Save.
6. Repeat for all sections that need due dates deleted.

Deleting Expected Items

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the grey expected item in the log. A dialog box appears.
2) Select Delete at the bottom of the window. A Delete items dialog box appears.
3) Enter a reason for deleting the item in the Reason for deletion field. The project leader will receive an email notification upon deletion.
4) Select Delete.

Note: The item is not removed from the website. Instead it is moved to the Deleted Items view, accessed through the view filters in the upper right corner of the screen. If necessary, a deleted item can be undeleted from this area.

Initial Uploading of a Submittal as a General Contractor or Construction Manager

When logged into Submittal Exchange, select your project and go to the Submittal log.
1) Select the description for the section to which you are uploading an item. A dialog box appears.

Note: If the item you are submitting is not in the Descriptions column for the section, select Multiple to the right of the description. You are able to enter an additional item description in the Other field.

2) Select Browse and upload your submittal file.
3) The name of your file appears under Browse.
4) Select Save. Your submittal uploads and an email notification is sent to the Design Team.
Notes:
- You are able to set a priority, if the item is of high importance or low. The best practice is to enter a reason for the priority in the Remarks field.
- The Remarks field is for high-level administrative comments. The comments are included in both the body of the email sent out and in the Remarks column in Display Full Log view.

**Initial Uploading of a Submittal as a General Contractor or Construction Manager using the Form Editor**

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the description for the section to which you are uploading an item. A dialog box appears.

   **Note:** If the item you are submitting is not in the Descriptions column for the section, select **Multiple** to the right of the description. You are able to enter an additional item description in the Other field.

2) Select the Form Editor and dialog box changes.
3) Some information is automatically populated. Complete information on the form.
4) Select **Browse** and upload your submittal file.
5) The name of your file appears under **Browse**.
6) Select **Save and send**. Your submittal uploads and an email notification is sent to the Design Team.

Notes:
- You are able to set a priority, if the item is of high importance or low. The best practice is to enter a reason for the priority in the Remarks field.
- The Remarks field is for high-level administrative comments. The comments are included in both the body of the email sent out and in the Remarks column in Display Full Log view.

**Logging a Hardcopy Submittal from a Subcontractor and Uploading the Scanned File as a General Contractor or Construction Manager**

When logged into Submittal Exchange, select a project and go to the Submittal log.

1) Select the description for the section to which you are uploading an item. A dialog box appears.

   **Note:** If the item you are submitting is not in the Descriptions column for the section, select the green upload arrow and add a description to
the Other option.

2) Complete the Supplier or Manufacturer field.
3) Complete the Date received from subcontractor.
4) Select Hardcopy under Received from subcontractor. Two drop-down fields appear next to the Hardcopy field.
   Select the number of hard copies in the first field and choose between Samples or Hardcopy from the second.
5) Under the Submittal to architect area, select Browse and upload your scanned file.
6) The name of your file appears under Browse.
7) If applicable, add comments in the Remarks from GC field.
8) Select Save. Your submittal uploads and an email notification is sent to the Design Team.

Logging Hardcopy Submittals Received from a Subcontractor and Sent as a Hardcopy to a General Contractor or Construction Manager

When logged into Submittal Exchange, select a project and go to the appropriate log.
1) Select the description for the section to which you are uploading a hardcopy. A dialog box appears.

   Note: If the item you are submitting is not in the Descriptions column for the section, select the green upload arrow and add a description to the Other option.

2) Complete the Date received from subcontractor field.
3) Select Hardcopy under Received from subcontractor. Two drop-down fields appear next to the Hardcopy field.
   Select the number of hard copies in the first field and choose between Samples or Hardcopy from the second.
4) Under the Submittal to Architect area select Hardcopy.
5) Enter the date under Date Sent.
6) In the Priority drop-down box select an appropriate priority.
7) If applicable, add comments in the Remarks from GC field.
8) Select Save.

Note: An email notification is sent to the Architect/Final Reviewer letting them know a hardcopy is in transit to them.

Removing Someone from a Project as a General Contractor

When logged into Submittal Exchange select your project and go to the Project Team tab.
1) Select the team member who should be removed.
General Contractors/Construction Managers on Submittal Exchange

2) Select **Remove Selected Users** above the table at the top or **Remove** in the gray table header.
   - A **Delete** items dialog box appears. It lists the team members to be deleted.
3) Select the **Delete** button.
   - The screen refreshes and the team member is longer included in the project team.

Note: If you are removing a user because the user is no longer employed, please contact Submittal Exchange Technical Support to have their access to Submittal Exchange removed.

### Renumbering Submittals as a General Contractor

When logged into your project on Submittal Exchange, select a project and go to the appropriate log. Find the section of the submittal that should be reviewed.

1) Select the description of the submittal, which will appear in red, or select **Send**, which will also appear in red. A dialog box appears.
2) In the **Submit** field delete or adjust the current submittal number.
3) Fill out the rest of the fields within the dialog box.
4) Select **Browse** and upload your file. The file name displays in the dialog box.
5) Select **Save** at the bottom of the dialog box. A green progress bar shows the progress until it hits 100%, then it closes and the view refreshes. Your submittal displays with its new number.

Note: Subsequent submittals will continue following the numbering pattern predetermined in the **Preferences** tab of the project.

### Returning Submittals to Subcontractors

When logged into Submittal Exchange, there are two options that can be used to return submittals to subcontractors.

Option 1 - Submittals are fast-tracked and the system returns email notification simultaneously to the General Contractor/Construction Manager and the Subcontractors.

Note: This is controlled by selecting **Reviews Completed** email for the Subcontractors on that section.

To set this option:

1. Select the **Project Team** tab.
2. Select one or more of the users under the **Subcontractor** table.
3. Choose **Edit** above the Subcontractor table. An **Edit Team Members** screen appears.
4. Next to **Email Notifications**, select **Reviews Completed**.
Option 2 - The General Contractor/Construction Manager receives an email notice that the final review is complete. The General Contractor releases it to the Subcontractor after the final review.

1. Select the **Project Logs** tab.
2. Select the red submittal line or the **Return** link. A dialog box appears.
3. From the dialog either:
   - Select the option to **Email PDF to subcontractor**
   - Select **Record in log, no other action**.
4. Select **Save**.

**Note:** When using Option 2, ensure that on the **Project Team** tab none of the Subcontractors have **Reviews Completed** selected as the **Email Notification** option.

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**Reviewing and Releasing a Subcontractor's file as a General Contractor or Construction Manager**

When logged into Submittal Exchange, select a project and go to the appropriate log. The submittal items that require attention appear in red.

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Select **Use previous file**.
3) Select **Save**.

The Subcontractor’s file reviewed by General Contractor is uploaded and the notification is sent to the Design Team.

**Reviewing and Releasing a Submittal as a General Contractor or Construction Manager Using Submittal Exchange’s PDF Editing Tool**

When logged into Submittal Exchange, select a project and go to the appropriate log. The submittal items that require attention appear in red.

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Verify all information filled out by your Subcontractor is correct.
3) Make the necessary adjustments.
4) Select the PDF editor with previous file icon.
   - This will launch the PDF editing tool with Java. Within the first page select **Continue**. A dialog box appears.
   - Select **Run** in the dialog box.
5) After Java is installed, the file opens. Use the editing tools at the top of the screen to add comments and markup the document.
6) When finished, select **Save**. The dialog box displays your file name.
7) Select **Save**. Your reviewed file uploads and an email notification is sent to the Design Team.

**Notes:**
- If you do not have Java installed on your computer, you will be prompted to install it the first time you use the tool.
- The speed of PDF editor is based on the size of your document, the speed of your internet, and the speed of your computer.

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### Reviewing and Releasing a Submittal as a General Contractor or Construction Manager Using the Form Editor and Integrated PDF Editor

When logged into Submittal Exchange, select a project and go to the appropriate log. The submittal items that require your attention appear in red.

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Verify all information filled out by your Subcontractor is correct. Make any necessary adjustments.
3) Select the **Form Editor** icon. The form editor dialog appears.
4) Complete the form information.
5) Select the PDF editor with previous icon.
   - This will launch the PDF editing tool with Java. Within the first page select **Continue**.
   - Select **Run** in the dialog box.
6) After Java is installed, the file will open. Use the editing tools at the top of the screen to add comments and markup the document.
7) When finished, select **Save**. The Submittal Exchange Form Editor dialog box displays the file name.
8) Select **Save and send**. Your reviewed file uploads and an email notification is sent to the Final Reviewer.
   - The cover/transmittal page that you filled out using the Form Editor is merged with the submittal item and placed as page 1 of the merged document.

**Notes:**
- If you do not have Java installed on your computer, you will be prompted to install it the first time you use the tool.
- The speed of PDF editor is based on the size of your document, the speed of your internet, and the speed of your computer.

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### Reviewing and Releasing a Submittal as a General Contractor or Construction Manager Using Your Personal Editing Tools

When logged into Submittal Exchange, select your project and go to the appropriate log. The submittal items that require your attention appear in red.

1) Select the file that was uploaded by the Subcontractor and save it to your computer.
2) Open the file on your computer and place your review comments on the file using your PDF editing tools.
3) When finished, save the file to your computer.
4) In the Submittal log, select the description of the item you reviewed and are ready to release. A dialog box appears.
5) Select Browse and upload your file. The file name displays in the dialog box.
6) Select Save. The reviewed file uploads and an email notification is sent to the Design Team.

Note: If your document is a PDF file and additional files must be associated with this review, you can upload multiple PDF documents which will compress into one file.

Reviewing and Releasing a Submittal Using the Form Editor as a General Contractor or Construction Manager

When logged into Submittal Exchange, select a project and go to the appropriate log. The submittal items that require your attention appear in red.

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Select the form editor icon. The dialog box changes.
3) Complete information in the dialog box.
4) Select Attach previous file uploaded by.
5) Select Save and send. Your reviewed file uploads and an email notification is sent to the Design Team.

Uploading a Hard Copy Submittal as a General Contractor or Construction Manager for a Subcontractor, Utilizing the Form Editor

When logged into Submittal Exchange, select a project and go to the appropriate log.

1) Select the description of the item you wish to upload. If the item is not listed, select the green upload arrow in the section number. A dialog box displays.
2) Enter information in the Supplier or Manufacturer field.
3) Select Date received from subcontractor.
4) Select Hardcopy under Received from subcontractor. Two drop-down fields appear next to the Hardcopy field.
   Select the number of hard copies in the first field and choose between Samples or Hardcopy from the second.
5) Select the form editor icon. The Form Editor dialog appears.
6) Complete information in the dialog box.
7) Select Browse and upload your file. The file name displays in the dialog box.
8) Select Save and send. The submittal uploads and an email notification is sent to the Design Team.
Uploading an RFI to multiple categories as a General Contractor or Construction Manager

When logged into Submittal Exchange, select your project and go to the RFI Log.

1) In the RFI log select the green upload arrow.
   ▶ This will open the RFI: Add New dialog box.
2) In the dialog box select Multiple to the right of the Category.
3) Use the CTRL key to select the categories to upload the RFI.
4) Enter the Description.
5) Select Browse and upload the RFI.
6) Select Save and submit.
   ▶ The RFI uploads and an email is sent to the Architect to request review of the RFI.

Note: If multiple categories are selected, the RFI is shown as a new line item in each category that was selected. It is reviewed concurrently across categories.

What Email Notification Options Are Available to General Contractors or Construction Managers?

General Contractors and Construction Managers can change their own email notifications and those of their own company. Project Leaders can change email notifications for all project team members.

New Items Uploaded - You will receive notification of uploads by your Subcontractors/Contractors for Submittals/Closeouts/RFI. You will receive email notices when something is uploaded to a posting only log.

Copy me on my Company Reviews - This will email you when anyone in your company uploads a reviewed item and sends it on to the Design Team.

Reviews Completed - This will send you a notification when the final review has been completed/posted on documents.

Reminders - This will send notifications once Expected Dates are set on Submittals/Closeout items. The dates are generally for your Subcontractors, but this will let you know which items are not getting submitted. This is based on the Required Item Turnaround date setting in the Preferences tab. This ensures you are aware there are items awaiting your review from the Subcontractor.

Changing Email Notifications as a General Contractor or Construction Manager

When logged into Submittal Exchange, select a project and go to the Project Team tab.

1) Select the Team Member’s email address. The Edit Team Member screen appears.
2) Under the Member Email Settings section, choose the notifications the user should receive.
3) Select Save.
Notes:

- General Contractors or Construction Managers who are not Project Leaders can edit team members from their own company as well as any Subcontractors on the project.
- If you are unable to change email notification settings, contact your Project Leader.
Legal Notices

Oracle Primavera Submittal Exchange Construction Team User Guide

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