Oracle
Primavera Submittal Exchange
Design Team User Guide

August 2024

Contents

About This Guide

This guide addresses questions frequently asked by design team members when using Oracle Primavera Submittal Exchange to upload, retrieve, track changes, and archive construction project documents. Architects, Consultants, Engineers, and Owners should use this guide.

About Consent Notices

Consent notices alert you to the need to protect personal information (PI). You and your organization might be collecting, processing, storing, and transmitting PI while using Submittal Exchange. When you accept a consent notice, your consent covers the collection, processing, storing and transmission of PI 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 PI as secure data. You may also be asked to provide consent for your organization to collect, process, store, and transmit your PI. If you refuse consent, you will be denied access to Submittal Exchange.

In This Section

Viewing your PI Data in Submittal Exchange

You can see your PI in Submittal Exchange from the **My Account** and **Team Member** pages.

Submittal Exchange for Outlook

In This Section

Downloading and Installing Submittal Exchange for Outlook

To download and install the Submittal Exchange for Outlook:

1) From the top banner, select the **Help** icon.
2) Select the **Contact Us** tab.
3) Select the **Download** button under the **Submittal Exchange for Outlook** section.
4) Choose **Save File** when prompted to open the Submittal Exchange for Outlook.exe file, and select the location where to want to save the .exe file.
5) The installation wizard will walk you through the installation. Follow the instructions to install the plugin. You will be prompted to accept the terms and conditions.

After the installation process is complete, you will see the **Primavera Submittal Exchange** menu appear on the top banner of your Outlook.

Logging in to Submittal Exchange

1) Open **Outlook**, and select the **Primavera Submittal Exchange** menu on the top banner.
2) A log in page appears, enter your Submittal Exchange credentials.

After you have successfully logged in, you can use the Submittal Exchange for Outlook to upload emails and attachments.

Working with the Submittal Exchange for Outlook

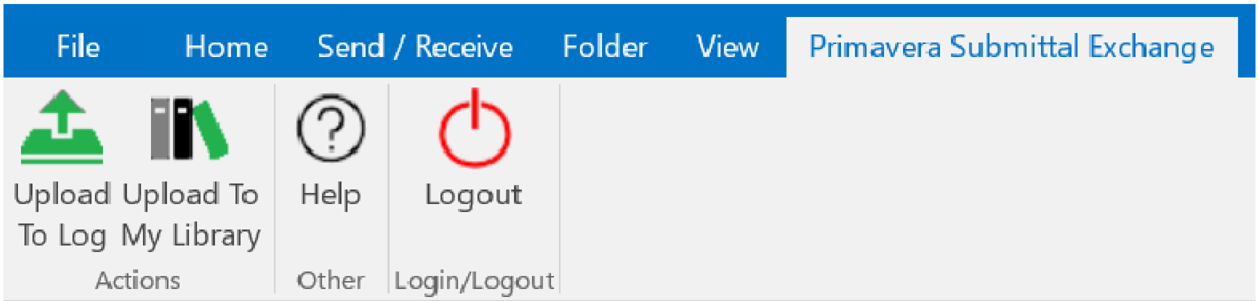
The Submittal Exchange for Outlook allows you to easily upload email attachments from Outlook into Submittal Exchange. Using this plugin you can upload files without first downloading the attachments onto your computer and then uploading them in Submittal Exchange.

You can upload files to individual logs (log types 1–8)) or My Library.

From the top banner on Outlook, select **Primavera Submittal Exchange** to view the menu options.

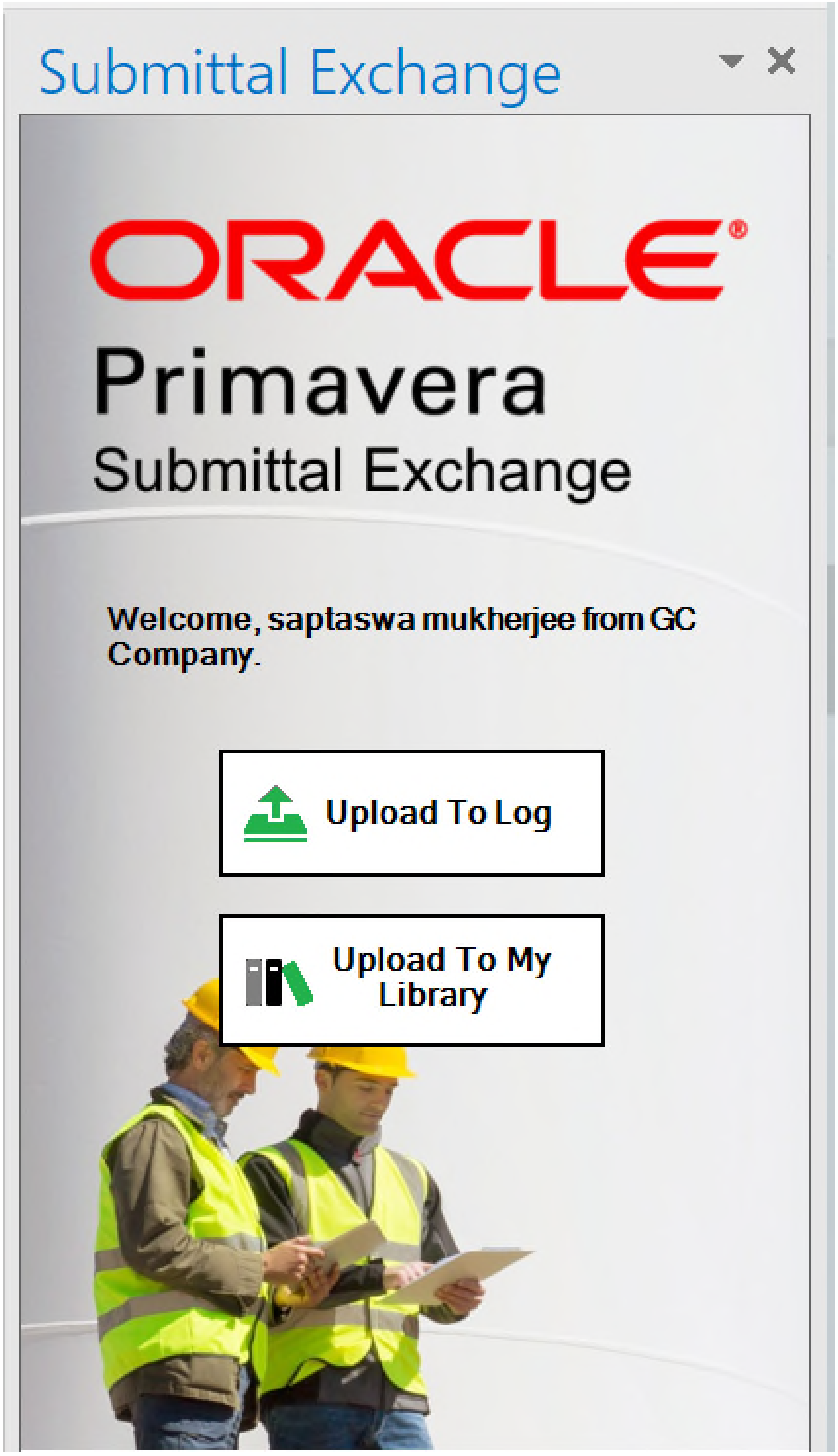
- **Upload to Log**: Select this option to upload documents to a specific log (log types 1–8).
- **Upload to My Library**: Select this option to upload files to My Library.
- **Help**: Select to view if there are updates available for this plugin.

- **Logout**: To logout of your Submittal Exchange session.



Right Pane

Use the right pane to upload files into My Library or to a log.



Uploading Files to My Library

To upload files sent to you via email to your Submittal Exchange library:

1) From Outlook, select the email which has the files you want to upload.
2) Select **Primavera Submittal Exchange** from the top banner, or expand the Submittal Exchange pane displayed on the far right corner of your email.
3) Select **Upload To My Library**.
4) From the **Upload to My Library** pop-up window, select the files you want to upload.
5) Select **Browse**, to include additional files from your computer.
6) Select **Upload**.

Tip:

To remove files, uncheck the checkbox or select **Remove** next to a file.

Uploading Files to a Log

To upload files sent to you via email to a log using the Submittal Exchange plugin:

1) From Outlook, select the email which has the files you want to upload.
2) Select **Primavera Submittal Exchange** from the top banner, or expand the Submittal Exchange pane displayed on the far right corner of your email.
3) Select **Upload To Log**.
4) From the **Upload** window, select the Project, Log, Section or Category, and Open Items where you want to add this file.
5) Select the upload options. Choose from: **Upload Email with attachments** or **Upload Files ONLY**.
6) If you selected the option **Upload Files ONLY**:
    a. Select individual checkboxes to choose the files you want to upload.
    b. Select **Browse** if you want to include additional files from your computer.
7) Select **Upload**.
   The **Add Submittal** page opens up within Submittal Exchange.
8) Review the information and make changes if necessary.
9) The **Description** field by default is name of the file you imported. To add another description, select **Multiple** to the right of the description. Enter an additional item description in the **Other** field.
10) Select **Save**.
    Your submittal uploads and an email notification is sent.

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**

Access/Permissions

In This Section

What is Submittal Exchange for Design?

Submittal Exchange for Design is a comprehensive collaboration tool for improving efficiency and communication during the design phase of a project.

Some of the things that Submittal Exchange for Design provides are:

- Comprehensive design document sharing (drawings, specs, models, etc.)
- Collaborative whiteboard and automatic synchronization of large files
- Automatic notifications and detailed upload and download histories
- Seamless transition into construction phase features when design is completed

Note: To schedule a demo please go to www.oracle.com/applications/primavera/products/submittal-exchange/index.html and select **Submittal Exchange for Design**. From there you can select **Schedule Demo** to complete the form to receive a personalized presentation of Submittal Exchange for Design.

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.

User Registration

To register users in Submittal Exchange:

1) From the **Registration** page, first enter your personal information.
2) Select **Continue**.
3) Next enter your company information.
4) Select **Continue**.
5) Accept the terms and conditions.
6) Select **Continue**. The **Registration Complete** page displays after you have finished the registration process.

Tips:

- The required fields have a red asterisk.
- Select the **Add** button next to **Office** drop-down to add a new location. Select **Edit** to edit the location.
- You can edit some field values that are auto-populated.

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
- 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.

1) Go to www.oracle.com/applications/primavera/products/submittal-exchange.html.
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.

> **Note:** Your password must be between 8 and 20 characters and have at least one uppercase character, one lowercase character, one number, and one special character (e.g. !@#$%^&*)

Creating New Roles

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

1) Select **Manage Roles** button.
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 edit custom role labels at the log and project level.

Editing Roles

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

1) Select the **Manage Roles** button.
2) From the **Manage Project Roles** page, select a role to edit it. The **Edit Role** page displays.
3) From the **Edit Role** page, you can change the Role Name, Access Role or Security Privileges.
4) Select **Save**.

> **Note:** Administrators and Project Leaders can edit custom role labels at the log and project 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**.

> **Note**: Only Project Leaders may copy roles on a project.

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** button. A new **Add Team Member** dialog box appears.
2) Select **Project Role** from a drop-down list.
3) Enter the new team member's email address.
4) Select **Next**. A new dialog box appears.
5) The company name is auto populated based on the email address domain. If the email address domain is associated with multiple companies, choose a company from the drop-down list. If the email address domain is not associated with a company, use the **New Company** to add a company.
6) For a new company, enter the company or organization name in the **Company Name** field.
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) From the **Frequency of Email Notifications** drop-down menu, select how frequently you want the user to receive email notifications. The default option is User Default.
12) Select applicable email notifications.
13) Select **Save**.

Notes:

- A Project Leader can add anyone to the project.
- An event is added to the Event History table when you enable or disable users.

Adding Team Members to a Project by an Architect

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) For a new company, enter the company or organization name in the **Company Name** field.
6) Select a **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, chose **Select from list** and select categories.
10) Select applicable email notifications.
11) Select **Save**.

Note: Architects can add users from their own office as well Consultants.

Adding Team Members to a Project by a Consultant

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.**

Note: Consultants are able to add users from their own office.

Adding Team Members to a Project by an Owner

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) Add a **Title**.
5) To add sections, choose **Select from list** and select sections.
6) To add categories, choose **Select from list** and select categories.
7) Select applicable email notifications.
8) Select **Save**.

Notes:

- Owners can add other users from their own office with the same domain.
- When a new Owner user is added to a project, the user settings are automatically populated. If settings for the new user need to be different, contact the Project Leader to make changes.

Disabling a User Account

Use the **Manage Users** page to disable a user's access to their account. An email is sent to the user indicating that their account has been disabled. The user whose account has been disabled has the option to cancel the request within 7 business days. The option to cancel the disable request is displayed when the users tries to log in.

To disable a user account:

1) From the drop-down menu under your user name, select **Company Account**. The **Company Info** page is displayed.
2) Select the **Manage Users** button.
3) From the **Manage Users** page, select the **X** icon on the Disable column next to the user you want to disable. **Note**: If a disable request has been submitted for a user then the **X** icon will not be displayed.
4) Enter the reason you want to disable to account.
5) Select **Disable**.

Exporting Company User List

From the **Manage Users** page you can export a list of all users in the company. The exported file lists all company users along with their login ID, the office location, and lists if they are an active user on a project.

To export the company user list:

1) From the drop-down menu under your username, select **Company Account**. The **Company Info** page is displayed.
2) Select the **Manage users** button.

   The **Manage Users** page displays.
3) Select the **Export** link to download and save the Excel file.

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).

Adding Review Codes for Reviewers' Companies

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

1) Under the **Organization** section, select **Edit review codes** to the right of your company name. A dialog box appears.

2) Enter a new code and explanation.

> **Note**: To create a new line item for Resubmittal, select the **Resubmittal Req'd** check box next to a review or action code.

3) In the dialog box, select **Save changes**.
4) On **Company Info**, select **Save changes**.

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.

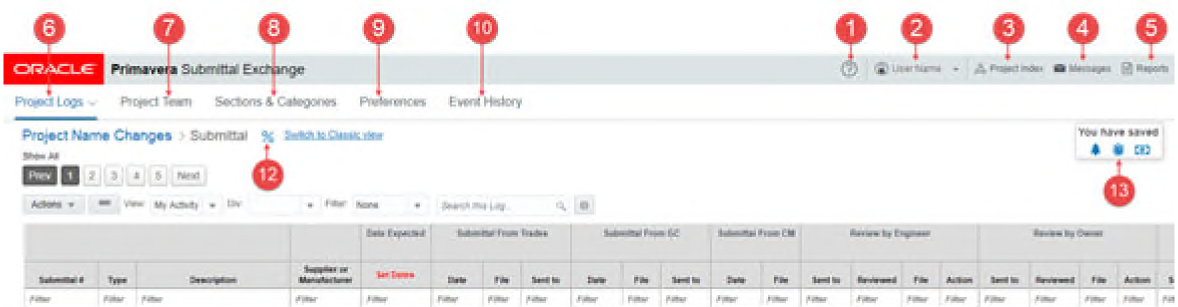
Note: *A Submittal Exchange user can send the email directly from a log or through the* **Return to Subcontractor** *dialog. See Sending a Submittal via Email (on page 75) for step-by-step instructions.*

Preferences/Settings

In This Section

Navigating Submittal Exchange Menus and Tabs

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



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) **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.

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.

- **Guides & Videos**- Provides access to the user guides for the Construction and Design Teams. You can also view Step-by-step videos that show how to use the Primavera Submittal Exchange system. You can also access a link to the Submittal Exchange Essentials on the Constructions Engineering Hub.
- **Contact Us**-
  - Contact information to email or call customer support. It also includes the link to the Primavera Submittal Exchange Community.
  - Environment Status: Select the link to view information on schedule maintenance and the status of Submittal Exchange. For more information, see topic ***Environment Status*** (on page 30).
  - Upload Project Manual: Select to upload specification manuals to Oracle Submittal Exchange setup team. For more information, see topic ***Uploading Project Specification Manual*** (on page 51).
  - Submittal Exchange for Outlook: See topic ***Submittal Exchange for Outlook*** (on page 13).

Environment Status

The Oracle Cloud Status Page provides information on scheduled maintenance and the status of Submittal Exchange. You can view events and updates directly on the status page or by subscribing to email alerts.

You can access the Oracle Cloud Status Page here:
https://statuspage.gbucnss.oci.oraclecloud.com/status/cegbu_subex/
(***https://statuspage.gbucnss.oci.oraclecloud.com/status/cegbu_subex/***)

How can I subscribe to get updates?

To subscribe to the Status Page to receive email updates.

1) On the **Status** page, select **Subscribe to updates**.
2) On the **Subscribe** page, enter your email address, and select **Subscribe** to updates.
3) You will receive an email to confirm your subscription. From the email, select **Confirm Subscription** to complete the subscription.

To manage or cancel your subscription, select **Subscribe to updates** and enter your email, or select **Manage Your Subscription** from a Status Page email alert. On the Oracle Cloud Global Status Page Notifications page, make changes to your data center selections or select **Cancel Subscription**.

What does an event's status indicate?

Scheduled Maintenance: This section displays the maintenance events along with the scheduled date, time, and duration. Any outage or performance impact is communicated to customers ahead of time.

Events: An event will typically move through the following statuses:

- **Event Under Investigation:** The issue and its impact are described.
- **Event Identified:** The issue has been identified. If available, the estimated resolution time is also communicated.
- **Event Resolved:** The event has been resolved and the site is fully operational.

After each unplanned event is resolved, our teams will conduct an investigation to determine the cause, assign corrective actions, and ensure efforts are made to prevent the issue from happening in the future.

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

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.

View a non-PDF file in My Library

To view non-PDF files:

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

Tip:

- You can zoom, and rotate your documents.

Edit a PDF 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.

Tips:

- You can zoom, rotate, and download your documents.
- You can set view preference from the **Account Info** page (Select your name and choose **My Account.**).

Merging Login IDs

You can use the **Merge Login ID** option from the **My Account** page to copy your projects, sections, categories, phases and email notifications from an old or incorrect user ID to a new ID. When the merge is successful all projects and corresponding roles, email settings, logs, sections and categories access are moved from the account you merged to your logged in account.

> **Important!**
>
> You cannot undo the merge, and the merged account cannot be recovered. Perform the actions on this page with care.

To merge login IDs:

1) From the **My Account** page, select the **Merge Login ID** button.
   The Merge Accounts page is displayed. The left pane displays details about your account.
2) From the right pane, enter the login credentials of the account you want to merge.

Notes:

- You will be required to complete the registration if the account is valid, but the registration has not been completed.
- You cannot undo the action of merging login IDs. The account you are merging will be disabled and cannot be recovered.
- The account to be merged should be a valid SE account. If you forgot the password, you must reset the password before proceeding.

3) Select the **Preview & Merge** button to preview the account.
4) Select the **Confirm Merge and Close** button. The **Merge Account Confirmation** page is displayed. Logged in account details on the left panel shows the newly added projects.The account you merged is disabled and removed from all assigned projects. An email notification will also be sent to your email address.

Project Index

When logged into Submittal Exchange, the **Project Index** is located at the top of 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:

- **Contractual End Date**-The project end date. The date is displayed in red for projects that have expired.
- **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.

Working with the Project Index Page

You can associate a color for each project on the **Project Index** page to easily identify and categorize projects. In addition, you can sort projects, and change the order of projects displayed.

- To sort columns, click on a column header.
- To change the order, select and hold the reorder icon and move the entire row to a new location in the table.
- To associate a color, select the paint brush icon and select a color from the **Mark with color** dialog box. To remove the color highlighting, select the **No Fill** option from the **Mark with color** dialog box.
- Use the **Search** box at the top of the page to search by project name or project number.

- Selecting the number under the pending GC/CM or Design Team column opens the **Open Items** tab.
- Select the **Export Log** link to export the **Project Index** page to Excel.

Working with Open Items Tab

To view open items in your project, select the **Open Items** tab from the **Project Index** page. The left pane displays all the projects you have access to and the right pane displays the open items within the project.

Select the **Show Open Items Count** button to view a count of all open items for the logged in user. Project specific count is displayed in each project row.

- Use the **Filter** box to search for a specific project.
- Use filters to select if you want to view your open items or view items that are pending GC/CM or design reviews.
- Use the **My Open Items** filter and take action directly from the **Open Items** tab.

Message Center

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

From the **Message Center,** you can view all automated emails from Submittal Exchange, these are emails you receive from notifications@submittalexchange.com. This page is divided into three panes: top pane, right pane, and left pane.

Top Pane

The top pane contains the Actions menu, and various filter options.

Page Elements	Description
Actions drop-down menu	You can take the following actions: - Mark All As Read - Mark As Read - Mark As Unread - Flag As To Do - Export selected messages: messages are downloaded as .zip if there are multiple selections or as .eml if only one message is selected.
Project	You can choose to view all projects or select a project.
Email Type	You can view all email types, or filter based on a particular type of email, for example: Discussion or Consultant Review.

Filter By	Choose from the following options: - Flagged - Has Attachment Link - Unread Emails - Read Emails
Filter By Date	Select a From and To date.

Left Pane

View emails based on the selected filter criteria. Message that have files that you can download are indicated with a paper clip icon. Use the checkbox to select individual emails, or select the **Select all Messages in this page** option. You can use the flag icon to flag individual messages or select a message and choose **Actions** > **Flag As To Do**.

Use the page numbers to navigate between pages or select the **Show All** option.

Right Pane

The right pane displays the content of the email you selected. You can also download a single email as a .eml file.

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:

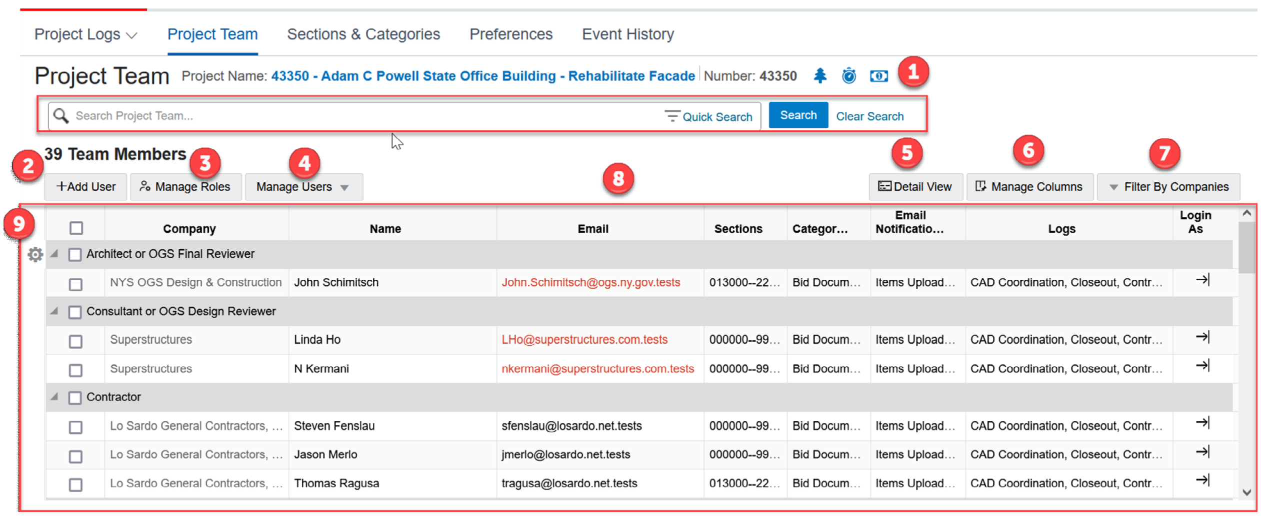
- ASIs
- Closeouts
- Daily Reports
- Invoicing and Payment
- PRs
- Photos

- 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.

The following screen elements are displayed on the Project Teams page:



1) **Search bar** and **Quick Search**: Use the search bar or the quick search to find a specific user or company.
2) **+ Add User** button: Select to add a new user. The **Add Team Member** page is displayed.
3) **Manage Roles** button: Select to manage project roles. The **Manage Project Roles** page is displayed.
4) **Manage Users** drop-down button: From this drop-down menu, the following options are displayed:
   - **Edit Selected Users**
   - **Remove Selected Users**
   - **Bulk User Import**
   - **Copy User From Another PRoject**
   - **Resend Password**
   - **Email Selected Users**
5) **Detail View** or **Summary View** button: Select to view the grid in a detailed or summary view.

6) **Manage Columns**: Select to specify the columns you want displayed in the grid. The choices selected on the Manage Column now persist across browsers and different Logins.
7) **Filter By Companies**: Select to narrow the grid by filtering on specific companies.
8) Main Grid: This grid organized into eight 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. A red indicator is displayed for undelivered email addresses in the project team.
   - **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.
   - **Phases**- Lists the phases that are viewable when team members first log in. This column displays only if it has been enabled during project setup.
   - **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.

   From the **Gear** menu, you can perform tasks against a role or user. The options include: **Edit Selected Role Users**, **Remove Selected Role Users**, **Resend Password**, **Email Selected Role User**, **Edit**, **Remove**, and **Send Email**.

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.

Contractual Project End Date: This is a view-only field. SE administrators can edit the field.

Approximate Project Size: This is a view-only field. Displays the approximate data size of your project.

Date Project End Email Sent: This is a view-only field. SE administrators can edit the field.

Use Phases: The ability to add phases is enabled by your administrator. Select the checkbox to view or add phases to a project. General Contractors and Architects with Project Leader role access can view, add, and edit phases, but cannot delete existing phases. Select the **Edit Phases** button and choose the **+ Add More Rows** link and enter an abbreviation and explanation for the new phase.

Subcontractor not required for the project: Select this option to disable a subcontractor's access to a project.

PDF Flattening: If your administrator has set the option to flatten PDFs, all uploaded PDF files will be automatically flattened.

> **Note**: Contact your Submittal Exchange administrator to add a Supplier or Manufacturer label to your projects

Event History

After selecting a project in Submittal Exchange, tabs appear under the header. The **Event History** tab shows a list of events that were recorded for your project. You can filter this table to view events generated by date, user, or type.

Screen Elements	Description
Events drop-down menu	Select the event you want to filter by and select the **Add to Search** button. The default option is All Events.
Users drop-down menu	Select the users you want to filter by, the default option is All Users. The list of users displayed is not restricted to project users, it shows all users that have at least one event in the project.
Filter by Date	Select to filter by date. The options include: Today, This Week, This Month, or Custom Date.

Search box	Enter a keyword to search across the event history table.
Column Filter button	Use to display or hide the in-column filter row.
Print button	Select to print the table.
Clear Filter button	Clears all selected filters. To remove individual filters, select the **x** next to the filter.

Tip:

Events which require action to be taken via Email have the text **Via Actionable Email** next to the event.

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. The alert icon is expanded to display the alert details when a user first logs in, or when an alert is added or modified.

> **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.

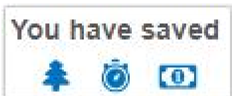
> **Note**: If there are no expected items anticipated for a section, best practice is to remove that section from the project.

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.

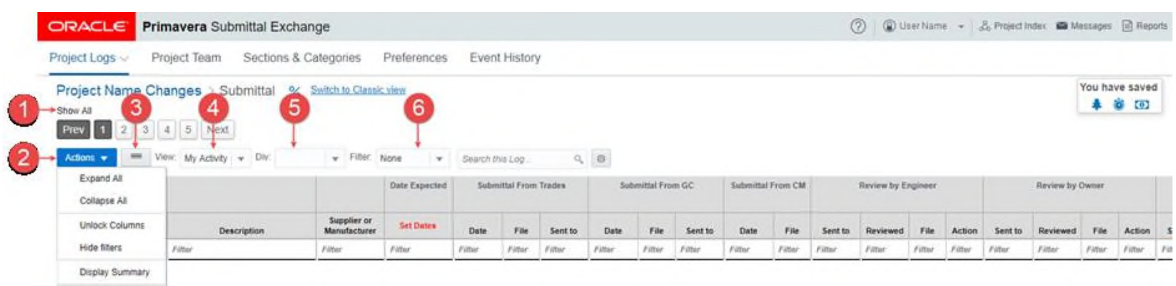
Trees-See the number of trees saved by using Submittal Exchange.

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.

Tip**:**

An alert message is displayed if the log display contains hidden columns. Select the **Table Settings** icon within the alert to show hidden columns and to hide additional columns.

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.

Note: 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.

Viewing Related Links

To view the related links associated with project items:

1) Select a project and choose the **Project Logs** tab from the **Header** menu.
2) Select the **Links** icon under the **Related To** column.
3) Choose a link to open the page.

Adding and Managing Related Links

To add and manage related links:

1) Select a project and choose the **Project Logs** tab from the **Header** menu.
2) Select the **Links** icon under the **Related To** column.
3) Select **Manage**.The **Manage Related To Links** page displays.
4) From the **Manage Related To Links** page, select **Add Links**.
5) Choose a log and section from the drop-down menu.
6) Select the **Add** button to link specific sections.
7) Select **Save Links**.

Tip:

To remove links, select the **Remove** button under the **Action** column.

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.

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**.

> **Notes**:
>
> - Submittal Exchange can remove addresses upon request.
> - You can also select the **Company Info** tab to change your office location and address.

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) Select the **Edit** button.
3) Enter the new address in the **Address** field.
4) Enter the new city in the **City** field.
5) Enter the new state in the **State** field.
6) Enter the new ZIP code in the **Zip** field.
7) (Optional) Enter phone number and fax number in **Phone** and **Fax** fields.
8) 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 the **Manage Users** drop-down button and choose **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**.

Editing Team Members

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

1) Select a team member.
2) Select **Gear > Edit**. The **Edit Team Members** page appears.
3) From the **Member Access Settings** section, you can add or delete logs, sections, categories, and phases.

   a. Choose **Select from list**, and select logs, sections, categories, and phases.
   b. Select **Done** when the edits for each have been completed.
4) From the **Member Email Settings** section, select the following:
   a. From the **Frequency of Email Notifications** drop-down menu, select how frequently you want the user to receive email notifications. The default option is User Default.
   b. Select the **Email Notifications** you want the user to receive.
5) Select **Save**.

Adding a Team Member to Multiple Projects

Use the **Add User To Multiple Projects** link to add a user to multiple projects within your company. You can clone the access and roles that you have on projects to a new or existing team member. From this page you can easy on board a new user to multiple projects.

> **Note:** This option is not available to administrators.

1) Navigate to the **Company Account**.
2) Select the link **Add User To Multiple Projects** link.
3) The **Add User To Multiple Projects** page is displayed. The left pane displays your account details, your projects, and the role you have for each project. The right pane displays a list of users who are part of your company.
4) From the right pane, select the user who you want to give project access.
5) From the **Assign Project** section, you can select the projects and the role you want to assign to the user. From the **Assign Projects** section, use the checkbox to select individual projects or use the **Select All** checkbox on the header row to select all projects.
6) From the **Clone Team Member Settings** section, you can choose your role or clone a team member's role setting. The role that you have in the project is automatically selected for the user.

   Tips:

   - The **Assign Project** section displays two numbers, the first number is the number of projects the selected user has access to and the second number is a count of project that will be added For example, if it displays **Assign Project (1+18)**, the selected user is part of 1 project and the + 18 indicates that 18 projects will be added to the selected user. If the second number is 0, then there are no projects that can be added.
   - The projects displayed in gray require no action from you.
   - A crossed out project name indicates that selected user and you both have access to the same project. Projects that are displayed in gray and have the checkbox grayed out are projects for which you don't have access, but the selected user has access.
   - The projects highlighted in green are the projects you can take action on.
7) Select **Preview** to view the changes.
8) 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.
    - **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 Create a Public Plan Room on a Design Project

When logged into Submittal Exchange, select a project and go to the **Preferences** tab to create a Public Plan Room for a Design Project.

1) Below the list of existing logs, select **Add New**. An **Add New Log** dialog box appears.
2) Enter a name in the **Log Name** field (ex. Plan Room, Bid Documents).
3) For the **Log Type** select **Type 6,** which is a Design posting log, no review (Design Documents, Planroom, Drawings, Specs or similar)
4) Choose **Enable Public Planroom**.
    - The URL will fill in the beginning of the Project name / Log name.
    - Adjust the auto-filled URL portions if needed.
5) (Optional) Enter a password for log.
6) Select the categories to be included in this log.
    - Common Categories: Drawings, Specifications, Addenda
7) Select **Save**.

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.

Log Display Speed

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

1) Under **View** select **Display one division or category at a time**.
2) Click the **Save Changes** button.

Notes:

- This will change logs to view one division or category at a time.
- To switch from one division or category to the next, you will click on the appropriate links at the top left of the log.

Uploading Project Specification Manual

You can upload a specification manual which will be used by the Oracle Submittal Exchange Setup team to set up your project. To upload the project manual:

1) Select the **Help** icon, and choose **Contact Us**.
2) From the **Contact Us** page, select the **Upload Project Manual** button.

3) Select if you are an enterprise customer. The required fields differ based on the selection you make.
4) Enter all the required fields marked with a red asterisk.
5) Optional. From the **Copy Existing Project** field, select **Yes** if you want to create this project based on an existing project.
   a. From the **Select Project to Copy** field, start entering the name of the project you want to copy. The system will display projects that match the name you entered. You can also select archived projects that are up to 180 days old.
   b. Select a project.
6) Optional, displays only if are an Enterprise customer.
   a. Choose a project value.
   b. Select if you want to invite a project lead to the project. Start entering the name of the project lead and the system will displays users whose name matches the name you entered.
7) Optional. Enter any additional notes.
8) Select **Browse** to choose a specification manual, or drop and drag the file.
9) Select **Upload** to submit the file the Oracle Submittal Exchange Setup team.

How To/Functions

In This Section

What is Submittal Exchange for Design?

Submittal Exchange for Design is a comprehensive collaboration tool for improving efficiency and communication during the design phase of a project.

Some of the things that Submittal Exchange for Design provides are:

- Comprehensive design document sharing (drawings, specs, models, etc.)
- Collaborative whiteboard and automatic synchronization of large files
- Automatic notifications and detailed upload and download histories
- Seamless transition into construction phase features when design is completed

Note: To schedule a demo please go to www.oracle.com/applications/primavera/products/submittal-exchange/index.html and select **Submittal Exchange for Design**. From there you can select **Schedule Demo** to complete the form to receive a personalized presentation of Submittal Exchange for Design.

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.

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.

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  **Gear > Email**.
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**.

Tip:

To email multiple team members, select the team members and select **Email Selected Users** from the **Manage Users** drop-down button.

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.
- A red indicator is displayed for undelivered email addresses in the Project Team page.

Managing Custom Stamps

You can view and manage custom stamps for your company from the Manage Custom stamps page.

Add New Custom Stamp

1) Select the **Company Info** page.

2) Select the **Manage Custom Stamps** button.
3) Select **Add**.
4) Drop and drag files or browse to select files.
5) Select **Save**.

> **Note**: For best results select transparent stamps.

Managing Stamps

To edit a stamp:

1) Select the **Company Info** page.
2) Select **Manage Custom Stamps** button.
3) Select the **Edit** icon.
4) From the **Edit Custom stamp** page, you can edit the stamp text or replace the stamp.
5) Select **Save**.

To delete a stamp, select the **Delete** icon.

To download a stamp, select the **Download** icon.

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.

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.*** for **Flattening tool**.

3) Open the 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.

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.

Downloading Dropbox

1) Go to ***www.Dropbox.com http://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

> **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.
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.

1) Go to ***http://www.java.com/en/download/manual.jsp http://www.java.com/en/download/manual.jsp***.
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 allow list) on all company firewalls. Your IT consultant may need the following information to add Submittal Exchange to the allow list:
   - **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 allow list, 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.

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.

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.

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

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*** (***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**.

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

1) Go to ***www.pdf995.com*** (***www.pdf995.com***).
2) Select **Downloads** towards the top of the screen.
3) Download the Pdf995 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 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 two previous versions of Mozilla Firefox.

Note: Submittal Exchange works with 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. To upload files larger than 100 MB, select the **My Library** link and select **Choose from Computer**. Browse to select you file and click **Upload Files**.
  - 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.

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**. Report-specific sections appear.
   - 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

   Report-specific sections appear.

   - 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

   Report-specific sections appear.

   - 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.

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 Al | 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**.

Managing your Access Settings

You can manage your access settings from the **Edit Team Member** page. You can add/remove your access to logs, sections, and categories, and set your email preferences.

Notes:

- You can only edit your access and not for other users.
- If you have removed access, you cannot add it back. Contact your Project Lead or your Administrator if you would like to regain access.

To edit your access settings:

1) Select the **Project Team** tab.
2) Select your name to view the **Edit Team Member** page.
3) From the **Manage Access Settings** section,make your changes.
4) Select **Save**.

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.

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

In This Section

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 add 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.
> - Contact your Submittal Exchange administrator to enable the Public Planroom.

Adding Custom Columns to a Project Log

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

> **Notes**:
>
> - You cannot add multiple custom columns to Type 7, 9, and 10 log types.
> - All changes made to custom columns are tracked and can be viewed in the **Event History**.
> - Custom columns are also displayed in the public view for Log Type 6.
> - Use the **Location** column to identify the placement of a custom column.

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) Use the **Select and drag** icon to change the location of a column. You can use the **Location** column to identify the current placement of a custom column.
6) 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.

Notes:

- You cannot change a File Uploader column type to any other type or change other column types to File Uploader.
- All changes made to custom columns are tracked and can be viewed in the **Event History**.
- Custom columns are also displayed in the public view for Log Type 6.

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.

Importing Expected Sections and Items

You can either import using an Excel template or you can upload your specification manual in PDF format to create submittal items within the chosen log. When a PDF file is uploaded, the system scans the file and displays the expected items and sections for you to review. You can preview the expected items and sections before importing it.

To import sections and items:

1) Select the **Sections & Categories** menu and select **Import Data**.
2) Select a log you want to import the sections and categories into.
3) Select if you want to import a specification manual in PDF format or if you want to download a template.
    a. Select **Download Template** to download the sample template. Follow the instruction on the template to create your import file and save it. Skip this step if you are uploading a PDF manual.
    b. Select **Browse** to upload project manuals as PDF or select the template you modified in step 3a.
4) Select **Next**. The **Import Preview** page is displayed. If you uploaded a specification manual in PDF format, the system automatically scans the file and pulls in the specification submittal names and numbers to create submittal items.
5) Review the items and select the check box next to sections you want to import and click **Import Export Items**.

Tip:

- Select the **Import Sections Only checkbox** to view only the section number and name, the description of each section is not displayed.
- Select the **Edit** icon on the **Import Preview** page to make changes to the sections. Select **Edit Multiple** to make changes to multiple sections at the same time.
- Select the **Delete** icon on the **Import Preview** page to delete a section.

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.

Editing Expected Items

To edit expected items:

1) When logged into Submittal Exchange, select a project.
2) Select the **Sections & Categories** tab.
3) Select any section from the left-hand table. This will display current expected items for that section in the right table.
4) Select **Edit** below the **Expected Items** table (right table).

   The **Edit Expected Items** dialog box displays.
5) Make the required changes and select **Save**.

Tip:

To select or de-select all items, select the **Select all rows** or the **Deselect all rows** check box next to the Log column.

Editing Multiple Expected Items

You can edit multiple expected items at the same time using Set Dates.

1) When logged into Submittal Exchange, select a project and go to the log.
2) From the **Actions** drop-down menu, select **Edit Expected Items**. OR Select the red **Edit Dates** link below the **Due Date** column
3) Select the check box next to each item you want to edit and select **Edit Selected**.

4) The **Edit Selected Expected Items** dialog box is displayed.
5) Make changes to the Date Expected, Phases, Supplier/Manufacturer, or any custom column.
6) Select the **Override existing data** check box if you want to override existing data. Unless this check box is selected, data will not be overwritten.
7) Select **Apply**.
8) Select **Save**.

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

Project Leaders can use **Edit Detail** to back out of a review.

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

> **Note**: When using **Edit Detail**, most automation is disrupted and the appropriate email notifications may not go to the team members.

Backing out a Final Review

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**.

Backing Out a Consultant Review

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 **Consultant Review**.
4) Remove the following by highlighting the text and using the delete key on your keyboard:
   - Date reviewed
   - Action code
   - Remarks, if entered.
5) Change the file type to **Hardcopy**.
6) Select **Architect Review**.
7) 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.
8) Change the file type to **Hardcopy**.
9) Select **Return to Subcontractor**. Remove the **Return to Subcontractor date** displayed in this area.
10) Select **Save**.

Backing Out a GC Review

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 **Submittal from GC**.
4) Remove the following by highlighting the text and using the delete key on your keyboard:
   - Date received from GC
   - Date Sent to Architect
   - Remarks, if entered.
5) Change the file type to **Hardcopy**.
6) Select **Consultant Review**.
7) Remove the following by highlighting the text and using the delete key on your keyboard:
   - Date Sent to
   - Date Reviewed
   - Action code
   - Remarks, if entered.
8) Change the file type to **Hardcopy**.
9) Select **Architect Review**.
10) 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.
11) Change the file type to **Hardcopy**.

12) Select **Return to Subcontractor**. Remove the **Return to Subcontractor date** displayed in this area.
13) 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.

Exporting Log Data

To export the entire log data into Excel:

1) Navigate to your project.
2) Select a log.
3) Select the **Export Log** button.

   The log data is exported, and an event is logged in Submittal Exchange.

Tip:

You can use the print functionality within Excel to print the log data.

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 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 a New 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**.
2) From the **Download Existing Archive** page, select **Request New Archive**.
3) From the **New Archive Request** section, select the **Log Detail** (views) to include in the archive.
4) Select the logs to include in your copy.
   - Only logs that contain documents are on the list.
5) Select any of the **Additional Options** as needed.
6) 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.
- An event is logged when archives are requested and downloaded. You can view the event from the **Event History** page.

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) From the **Manage Users** drop-down button, 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 do I Set Project Milestones for Construction Projects

To set project milestones:

1) Select your project.
2) From the top-navigation bar, select **Preferences** tab.
3) Select the **Project Milestones** checkbox.
4) Select the **Add new milestone date** link. A dialog box displays
5) Within the dialog box, set the fields below:
   - **Percent of completion for the project**
   - **Milestone description**
   - **Date of completion of milestone**
   - **Number of days prior to completion date for alerts**
6) 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 sent email notifications for pending work.
- To edit a milestone, select a milestone, and change the field values.

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 **Gear > Remove**. The **Delete Members** 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.

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

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.

How to Undelete Multiple Items

For all project logs that have the option to delete multiple items, you can now undo multiple deleted items. Select to undo all deleted items or selectively choose items. The events are audited and can be viewed under **Event History**.

To undelete multiple items:

1) Select a project and go to the appropriate log.
2) Select **Deleted Items** from the **Filter** drop-down list at the top right corner. Only deleted items appear in the log.
3) Select the item that needs to be undeleted and select **Gear > Undelete Items**. The **Undelete Items** dialog box appears.
4) Enter a reason for undoing the selected deleted items.
5) Select **Undelete.** The item is placed back into the log it was deleted from.

Manage Drawings

Use the **Manage Drawings** page to manage, upload, replace, or delete multiple files at the same time. This option is available only for Log Type 6 (Design Documents, Planroom, and Drawings).

1) Select a project and navigate to your log.
2) Select the **Manage Drawings** link from the top (Classic View) or from the **Actions** drop-down menu (Standard View). The **Manage Drawings** page is displayed.
3) From the **Manage Drawings** page, select your categories and select **Apply**.
4) From the **Manage Drawings**, you can do the following:
   a. To add a new file: Select the **Add New** button from the grid. A new line is displayed on the grid. Enter a description and select a file by browsing. You can drag and drop files from the right pane (**Files** pane) onto the main grid. To add or replace multiple files from your library in Submittal Exchange, select the **My Library** link.

b. To replace files: Drop and drag files onto the right pane (**Files** pane) or by selecting **Browse**. The system auto maps the file based on the name and file extension. A green check mark is displayed next to files that are auto mapped. You can also drag and drop files from the **Files** pane onto the main grid. The new file is displayed under the New Drawing column

c. To delete files: Select the red **x** next to files. Note you are deleting the file only from the Manage Drawings page and not from the log.

d. To split a PDF file: Select the **Split PDFs** checkbox to create a drawing set by splitting a multi-page PDF file into separate drawings. For each split file the remarks field is updated with the page number in the format *Page 'n' of 'Master File.pdf*. You can edit or delete the page number.

e. To update multiple remarks: Select the **Edit Remarks for All** button. Enter your comments and select **Apply**. This option will replace all existing comments.

5) Select **Save**.
6) Optional step. Provide feedback to the Oracle Submittal Exchange team on your experience with the Split PDF feature. Enter your feedback and select **Save**. You can choose to enable or disable the feedback notification from the **My Account** page.

Tip:

While adding PDF files, you can choose to flatten PDF files.

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.

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.

Reorder Project Roles on the Project Team Page

As a Project Leader, you can reorder the **Project Team** page using project roles. You can use the **Manage Project Roles** link to rearrange the roles displayed on the Project Team page. The change is displayed at the project level for all team members.

To change the default order of the project roles displayed on the Project Team page:

1) When logged into Submittal Exchange, select a project and go to the **Project Team** tab.
2) At the top of the page, select **Manage Roles**.
   The **Manage Project Roles** dialog box displays.
3) Select and drag the **Reorder** icon next to a role to change the order of display.
4) Select **Close**.

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 **Add,** or from the **Gear** menu, select **Add New Photo**.
2) From the **Add Photo** dialog box. 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) Optional. Enter a comment.
4) Optional. Use the rotate buttons to change the orientation of the image. Note, the original orientation of the image is maintained when you upload.
5) Once you have chosen all photos, select **Save**.

Tips:

- To delete a photo, select on the red **x** next to it. If you delete photos, they are permanently removed from the project.
- You can select multiple photos to upload at the same time.
- You can upload, view, and edit your photos from a mobile device.

Editing a Photo Gallery

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,** or from the **Gear** menu, select **Edit Gallery**.
2) From the **Edit Gallery** page, you can change the name of the gallery, description, and gallery owner. You can also add, edit, delete, and download photos.
3) Select **Save**.

Tip:

You can view and edit your photo gallery from a mobile device.

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.

Tip:

Events which require action to be taken via Email have the text **Via Actionable Email** next to the 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.

Tip:

Events which require action to be taken via Email have the text **Via Actionable Email** next to the event.

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**.

Architects on Submittal Exchange

In This Section

Adding Expected Items as an Architect

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.

Performing Final Review as an Architect - No Additional Comments or Action

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. The default option of **Release without further comment** is selected.

2) Select **Save and send**. The Consultant's file is released as the final reviewed file. Notification is sent to the General Contractor.

Performing Final Review as an Architect - Using PDF Editor

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

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Select **Add additional review**.
3) Use the **Action Code** drop-down list to select the applicable code. If the item requires it, select **Requires resubmittal**.
    - Select the PDF editor with previous file icon. Within the first page select **Continue**. A dialog box appears.
    - Select **Run** in the dialog.
4) After Java is installed, the file opens. Use the editing tools at the top of the screen to add comments and markup the document.
5) Select **Save**. The dialog box displays your file name.
6) Select **Save and send**. Your reviewed file uploads and an email notification is sent to the General Contractor.

> **Note**: The speed of PDF editor is based on the size of your document, the speed of your internet, and the speed of your computer.

Performing Final Review as an Architect- Adding an Additional Reviewed File

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

1) Select the file that was uploaded by the Consultant in the Submittal.
2) Use a PDF editing tool to open, review, add comments, and save the file to your computer.
3) In the Submittal log select the description of the item you reviewed. A dialog box appears.
4) Select **Add additional review**.
5) Select the applicable **Action code** using the drop-down list. If the item requires a resubmittal, select **Requires resubmittal**.
6) Select **Browse** and upload your file. The name of your file appears under **Browse**.

> **Note**: If your document is a PDF file and additional files need to be associated with this review, you are able to upload multiple PDF documents which will compress into one file.

7) Select **Save and send**. Your reviewed file uploads and an email notification is sent to the General Contractor.

Performing Final Review as an Architect - Using Form Editor and Adding an Additional Reviewed File

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

1) Select the file that was uploaded by the Consultant in the Submittal.
2) Use a PDF editing tool to open, review, add comments, and save the file to your computer.
3) In the Submittal log select the description of the item you reviewed. A dialog box appears.
4) Select **Add additional review**.
5) Select the applicable **Action code** using the drop-down list. If the item requires a resubmittal, select **Requires resubmittal**.
6) Select the form editor icon. The dialog box changes.
7) Complete information on the form.
8) Select **Browse** and upload your file. The name of your file appears under **Browse**.
9) Select **Save and send**. Your transmittal cover and reviewed file uploads and an email notification is sent to the General Contractor.

> **Note**: If your document is a PDF file and additional files need to be associated with this review, you are able to upload multiple PDF documents which will be combined into one file.

Performing Final Review as an Architect - Using Form Editor and Adding a Consultant's File

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 **Add additional review**.
3) Select the applicable **Action Code** using the drop-down list. If the item requires it, select **Requires resubmittal.**
4) Select the form editor icon. The dialog box changes.
5) Complete the remaining fields. The **Attach Previous File** option is selected by default, indicating the Consultant's file is attached to the transmittal cover.
6) Select **Save and send**. Your transmittal file attaches to the Consultant's file and uploads. An email notification is sent to the General Contractor.

Performing Final Review as an Architect - Using a Form Editor and a PDF Editing Tool

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

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Select **Add additional review**.
3) Select the applicable **Action Code** using the drop-down list. If the item requires it, select **Requires resubmittal**.
4) Select the form editor icon. The dialog box changes.
5) Complete information on the form.
6) Select the PDF editor with previous file icon.
   - Within the first page select **Continue**. A dialog box appears.
   - Select **Run** in the dialog box.
7) After Java is installed, the file opens. Use the editing tools at the top of the screen to add comments and markup the document.
8) Select **Save**. The dialog box displays your filename.
9) Select **Save and send**. Your reviewed file uploads and an email notification is sent to the General Contractor.

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 a submittal or closeout item adjusted. The section number and name highlight in blue.
2) From under the **Expected items in this section:** box, select **Edit**.
3) Select either **Submittal** or **Closeout** from the drop-down list for the expected item.
4) Select **Save**.

Deleting Expected Items as an Architect

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

1) Select the section that needs submittal or closeout items removed.
2) From under the **Expected items in this section:** box, select **Edit.**
3) Deselect the expected items.
4) Select **Save**.

> **Note**: Only General Contractors and Construction Manager project leaders can use this method to remove expected items. Other users can add items, but cannot remove them.

Removing Someone from a Project as an Architect

Architects can remove users from their office as well as any consultants.

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

1) Select the check box next to the Team Members to remove.
2) From above the **Architect Project Leader** table, select **Remove Selected Users.**
    - A dialog window appears. It lists the members to be deleted.
3) Select **Delete**. The **Project Team** screen refreshes and the team member no longer appears in the table.

> **Note**: If the user to be removed is no longer employed with the company, contact Submittal Exchange Technical Support to have the member's access to Submittal Exchange removed.

How to Renumber Submittals as an Architect

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

1) Select the description for the submittal to renumber. A **Submittal Detail** dialog window appears.
2) From the top of the dialog box, select **Edit submittal detail.**
3) In the **Submittal number** field, enter a new number.
4) Select **Save**.
5) The dialog window closes and the log displays the submittal with the new number.

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

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 needs to be moved. A dialog box appears.

> **Note:** To select the Submittal choose the description, or anything in the Section row of the table except the file itself.

2) Select **Edit Detail** in the top right corner. A dialog box appears.
3) Select **Move section** in the top right corner. A Move Section dialog appears.
4) Select the section to which you want to move the submittal.
5) Select **Save and close** to return to the log.
   -Or-
   Select **Save and return to editing details** to return to the previous dialog box.

The submittal is now moved to the new section.

Note: This task can only be performed by the Project Leader and Architect.

Releasing Physical Samples as an Architect

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 item you are reviewing. A dialog box appears.
2) Within the **Submittal from GC** section:
   - Enter the **Date received from GC**
   - In the two drop-down fields next to **Received from GC** select the number of hard copies in the first field and choose between **Copies** or **Samples** from the second.
3) Within the **Architect Review** section:
   - Enter the **Date returned to GC**
   - Enter the **Action Code**
   - Add any comments in the **Remarks from reviewer** field
   - Select **Hardcopy** under **Returned to GC**. 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) Select **Save**.

Note: This system records that you received hard copies or samples from the General Contractor and allows the Consultants to add their reviews as needed.

What Email Notifications Are Sent to Architects?

Items Uploaded - Sent when General Contractors or Construction Managers upload Submittals or Closeout item and when items are uploaded only to a **Posting** log

Reviews Completed - Sent when the Consultants review Submittal or Closeout documents. Architects can take direct actions by using the action buttons provided in the email

Copy me on my Company Reviews - Sent when a company user uploads a reviewed item and sends it back to the General Contractor or Construction Manager

Reminders - Sent based on the **Required Item Turnaround** date setting in the **Preference** tab; these notifications inform users there are items awaiting review

Include Items Overdue from Contractor - Sent based on the **Date Expected** in the **Full** log; this setting ensures email reminder notifications are received for items awaiting submission by the Contractor or Subcontractors

Changing Email Notifications as an Architect

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** page appears.
2) Under the **Member Email Settings** section, choose the notifications the user should receive.
3) Select **Save**.

Note: If you cannot change email notifications, please contact you Project Leader.

Consultants

In This Section

Removing Someone from a Project as a Consultant

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

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

Reviewing and Releasing a Submittal as a Consultant

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 file that was uploaded by the General Contractor or Construction Manager 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 Exchange **Submittal** log, select the description of the item you reviewed and are ready to release. A dialog box appears.
5) Select the applicable action code using the drop-down list. If the item requires it, select **Requires resubmittal**.
6) Select **Browse** and upload your file. The name of your file appears under **Browse**.

> **Note**: If your document is a PDF file and additional files need to be associated with this review, you are able to upload up to multiple PDF documents which will compress into one file

7) Select **Save and send**. Your reviewed file uploads and a notification is sent to the Final Reviewer.

Reviewing and Releasing a Submittal as a Consultant Using Form Editor

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

1) Select the file that was uploaded by the General Contractor or Construction Manager 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 Exchange **Submittal** log, select the description of the item you reviewed and are ready to release. A dialog box appears.
5) Select the applicable **Action Code** using the drop-down list. If the item requires it, select **Requires resubmittal**.
6) Select the form editor icon. The dialog box changes.
7) Complete the information on the form.
8) Deselect the **Use previous file** option and select **Browse**.
9) Select **Browse** and upload your file. The file name displays in the dialog box.

> **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.

10) Select **Save and send**. The reviewed file uploads and an email notification is sent to the Final Reviewer.

Reviewing and Releasing a Submittal as a Consultant Using Form Editor and Submittal Exchange's PDF Editor Tool

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

1) Select the description of the submittal you are reviewing. A dialog box appears.
2) Select the applicable **Action Code** using the drop-down list. If the item requires it, select **Requires resubmittal**.
3) Select the form editor icon. The dialog box changes.
4) Complete the information on the form.
5) Select the PDF editor with previous file 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 your screen to add comments and markup the document.
7) When finished, select **Save** in the upper left hand corner. 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.

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.

Why Don't Consultants' Items Turn Black After Items Have Been Reviewed?

When logged into Submittal Exchange as a Consultant, select your project and go to the appropriate log. Submittal items will remain red even after you have reviewed them.

Reasons the item remain red:

1) It allows the Consultant to re-review a document if necessary prior to the final review.
2) It allows multiple consultant reviews of a file. One Consultant can review the file while another Consultant can select the same red line item to add additional reviews if necessary.

Once the Architect completes the review and releases the item back to the Contractor, the item turns black for the Consultant and Architect, indicating that the item has completed the review process.

What Email Notifications Are Sent to Consultants?

Consultants and engineers can change their own email notifications and those of their own company. Project Leaders can change email notifications for all project team members.

Items Uploaded - You receive a notification of uploads by your General Contractor/Construction Manager for Submittals/ Closeouts. You receive email notices when something is uploaded to a posting only log.

Reviews Completed - You receive a notification when your company posts reviews of documents.

Reminders - 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.

Owners

In This Section

Removing Someone from a Project as an Owner

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

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

How to Upload to a Posting Log

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

1) Select the green upload arrow to next to category to which you are uploading. A dialog box appears.
2) Enter a description.
3) Select **Browse** and upload your file.
4) The name of your file appears under **Browse**.
5) Select **Save**.

> **Note:** To upload to a posting log, users must have access to the categories within the **Project Team** tab and have permission to post in the log, which is a setting the **Preferences** tab.

Oracle Primavera Submittal Exchange Design Team User Guide

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