

Oracle® Primavera Submittal Exchange

What's New



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Oracle Primavera Submittal Exchange What's New,

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Primary Author: Oracle Corporation

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What's New in Submittal Exchange

January 2026

Feature	Description
Revamped Punchlist Log	We've revamped the look and feel of the Punchlist log to improve the usability of the log. The functionality of this page remains the same. The New View is displayed by default. You can use the Switch to Old View link to view the page in the old format.

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Earlier Releases

What's New in Submittal Exchange 2025

October 2025

Feature	Description
Edit PDF on Type 5 Logs	As a user with posting and upload privilege, you can edit PDF files for Type 5 logs in both Classic and Standard views. An event is logged when a PDF is edited, and can be viewed from the Event History page.

August 2025

Feature	Description
Adding Phases to Log Types 6 and 7	<ul style="list-style-type: none">For log type 6, you can associate multiple phases when uploading new documents. The Phase column is displayed on the Public Planroom URL Bid page.For log type 7, you can associate multiple phases on the Edit Gallery page. You can view the Phase column on the Log page.
Edit PDF on Drawing Logs	As a user with posting and upload privilege, you can edit PDF files for Drawing Logs (Log Type 6) in both Classic and Standard views. Each time a PDF file is edited, an event is logged which can be viewed from the Event History page.

May 2025

Feature	Description
Tagging Project Team Members	When uploading items to logs, you can now choose to tag team members. A new privilege Tag User is automatically enabled for all new and existing non-admin roles. When uploading files, select the Tag Team Members drop-down to choose team members. You can choose to tag up to five team members. For roles other than initiators, the existing Comments/Remarks field on the upload/Review pages can be used to provide tag remarks. To view the Tagging History page, select the Email Notifications link from the View Details page of the log.

Note

The tag user option is not available for the Punchlist log.

March 2025

Feature	Description
Enhanced Control for Project Leaders	We have enhanced the settings available to project Leaders. On the Preferences page, project leaders can now enable and disable project action and review codes. They can also setup custom remarks for architect to auto release items. The Edit Log Setting page is updated to give project leaders more control when setting up logs. These settings were previously only available to administrators.

February 2025

Feature	Description
Enhanced Project Index and Log pages	We have enhanced the Project Index and Log pages for Project Leaders to now display when projects are due to expire. A banner is displayed on the top of the page to show the project expiry date. The projects are also displayed in specific colors to highlight how close a project is from its expiry date: <ul style="list-style-type: none"> • Green: From 120 to 61 days before project expiry. • Orange: From 60 to 31 days before project expiry. • Violet red: From 30 to 8 days before project expiry. • Red: From 7 days before to 4 days after project expiry.

January 2025

Feature	Description
View Subscription ID	View Subscription ID We have enhanced the Project Index page to now display the Subscription ID. You can now easily identify the Subscription ID associated with a project.

What's New in Submittal Exchange 2024

October 2024

Feature	Description
Enhanced Bulk User Import Functionality	When using the Bulk User Import functionality, you can now assign phases to team members. You can also associate phases when importing from a template. The template format has changed from xlsx to xlsxm.
Enhanced Custom Reports	A new Action column is now displayed on custom reports. It displays the most recent action code entered.

August 2024

Feature	Description
Enhanced Upload Project Specification Manual	When uploading a project specification manual, you now have the option to copy a project that is not displayed under the Select project to copy drop-down list. From the Upload Project Manual page, select the Couldn't find project checkbox and enter the name of the project you want to copy.

July 2024

Feature	Description
Increased Character Limit for Email IDs	We have updated the character limit for Email IDs to 99. Multiple pages in the application are updated to allow longer character length for email IDs.
Enhanced Upload Project Specification Manual	When uploading project specification manual, the Select Project to Copy field is updated to allow copying of archived projects. In addition to copying active projects, you can now also choose from archived projects.

May 2024

Feature	Description
Environment Status	A new link under the Help > Contact Us menu provides access to the Oracle Cloud Status page. Use this page to view the current status of Submittal Exchange and view information on upcoming schedule maintenance. You can view events and updates directly on the status page or by subscribing to email alerts. For more information, see topic Environment Status.
Rearranging Custom Columns	After adding custom columns to logs, you can rearrange the location of custom column by using the Select and drag option on the Edit Log Settings page.

February 2024

Feature	Description
Export Company User List	A new option on the Manage Users page now allows you to export a list of all users in the company. Use the Export link displayed on the Manage Users page to download an Excel file with a list of all company users. It lists the username, login ID, office location, and indicates if users are currently active on a project.

January 2024

Feature	Description
Share Report Access	You can now grant users in your company access to run your custom and saved reports. Users can view and edit your report, but the option to delete the report is restricted to the report creator. A shared icon is displayed next to reports you have shared. The option to share is displayed in the left pane under Access while creating or editing a report.
View Report Edit History	A new Report Edit History tab is displayed in View Details section of the report. This tab displays a list of all changes made to a report. It displays the following columns: Edit Date, Edited By, and Changes Done.
Display Count of All Open Items	From the Open Items tab you can now display a count of all open items for the logged in users by selecting the Show Open Items Count button. In addition to displaying a total count, it also displays project specific count in separate rows.

What's New in Submittal Exchange in 2023

December 2023

Feature	Description
Submittal Exchange on Construction Engineering Hub	Added easy access to the Submittal Exchange Essentials page on the Construction Engineering Hub. The Submittal Exchange Essentials page describes how to perform common tasks in Submittal Exchange. To access this page, from the Submittal Exchange application, select ? Help > Guides & Videos . Select the link to navigate to the Submittal Exchange Essentials page.

September 2023

Feature	Description
Project Expiration Notification	The project expiration notification is displayed on the banner on the fifth day after the project expiration date. The expiration notification is displayed on all log pages of an expired project.
Email Addresses with Apostrophe	You can now add email addresses with apostrophes in Submittal Exchange.

August 2023

Feature	Description
Adding Users to Multiple Projects	You can now easily add users to multiple projects and assign project roles from one new page. From the Company Account page, select the link Add User To Multiple Projects to add a user to projects that you are associated with, and assign them project roles. You can either clone your access and role or select a team member's role to clone. This functionality is useful when you are on boarding a new user to multiple projects. For more information see topic, Adding a Team Member to Multiple Projects in the Construction Team User Guide and Design User Guide.
Upload File Control	We have updated all pages within the application to show users where they can drag and drop files while uploading files in Submittal Exchange.

June 2023

Feature	Description
Enhanced Upload Manual Page	We've enhanced the functionality of the Project Manual Upload page to include additional fields to assist the Submittal Exchange Project Setup team with creating your new project. Additional fields and the option to upload the specification manual have been added.

May 2023

Feature	Description
Custom Roles Labels on Project and Logs	Project leaders can now view and edit custom roles at the project level and log level. Use the Preferences page to update custom role labels at the project level. As a project leader you can also change the custom role label while editing a log. The Event History page displays a record of all the changes made to custom roles.

April 2023

Feature	Description
Removed the Savings Calculator Functionality	We have removed the saving calculator that is displayed on the Submittal Exchange User Interface to improve performance.

March 2023

Feature	Description
Exporting Project Index	We have enhanced the exporting data functionality to now include the option to export project index data. A new Export Log link is displayed on the Project Index page. Selecting the link will export the entire project index data to Excel.

February 2023

Feature	Description
Exporting Log Data	Exporting Log Data We have expanded the option to export log data into Excel for the following logs: Type 4- RFP, Type 5-Posting log, Type 6- Design Posting, Type 7-Gallery Posting log, and Type 8- PR. A new Export Log button has been added to these logs and is displayed in both Classic and Standard views. An event is logged each time a log is exported.

January 2023

Feature	Description
View Open Items	As a Submittal Exchange user, you can now view a filtered list of open items across all your projects. A new Open Items tab on the Project Index page displays the open items for your projects. Use the specified filters to view open items that are assigned to you, or items that are pending design team, GC, or CM reviews. You can also take action on an open item from this tab. A filtered view of the Open Items tab can also be accessed from the Project Index page by selecting the number under the Pending GC/CM, Design Team column.

What's New in Submittal Exchange in 2022

December 2022

Feature	Description
Exporting Log Data	We have added a new option to export log data into Excel for the Submittal, Closeout, and RFI logs. A new Export Log button has been added to these logs and is displayed in both Classic and Standard views. An event is logged each time a log is exported.

November 2022

Feature	Description
View Company Logo on Reports	The reports generated using the Reports page now display your company logo on the header. The logo is displayed on all report output formats except HTML.

Feature	Description
Enhanced logging on the Event History Page	The Description field on the Event History page now displays the existing and the updated content for all modified items across all logs. The page also records when items are moved from one section to another within the same log using the Move Section link.

October 2022

Feature	Description
Edit Remarks Field for RFI and Log Type 8	Architects, project leads, and administrators can now edit the Remarks field on RFI and Log Type 8 logs. The option to edit this field is now available after an action has been taken on an item.

August 2022

Feature	Description
Enhancements to the Split PDF Feature	We have made the following enhancements to the split PDF functionality: <ul style="list-style-type: none"> Choose files from My Library. Removed the page number that was previously included in the description field. The page number is now displayed in the remarks field as Page 'n' of 'Master File.pdf'. Provide feedback on your experience with the split PDF functionality. The form is displayed after you select Save on the Manage Drawings page. You can turn on or off the Customer Feedback notification from the My Account page by selecting or deselecting the Show Feedback Notification checkbox.
Freeze Header Row on Log pages	In Classic view, for logs organized by categories, the first three columns and the header row are frozen. For logs organized by sections, the first four columns and the header row are frozen. This does not affect the Punchlist log.
Restricted Links under Mange Links	We have fixed the restricted links under Manage Links . You can now view linked item details after creating them on the Manage Links page.

July 2022

Feature	Description
Splitting PDF Drawings	<ul style="list-style-type: none"> When uploading a multi-page PDF file for Log Type 6, you can now choose to split each page into separate drawings. After splitting, the description field is auto filled with the Drawing Number which is pulled from the Drawing Block on each page of the PDF. Email notifications are sent out to users for each upload, and events are logged when files are split or uploaded.
Enhanced Project Team Page	The Project Team page has been updated to allow for column resizing. The choices selected on the Manage Column now persist across browsers and different Logins.

June 2022

Feature	Description
Project Team Page Revamped	<p>With this release, we have revamped the look and feel of the Project Team page while maintaining the same functionality. The redesigned page allows you to view all relevant information and easily access all the actions you can take. Some of the improvements include:</p> <ul style="list-style-type: none"> • Easily search for users, roles, or companies using the Search bar and the Quick Search button. • Filter based on companies using the Filter by Company button. • Customize the grid by choosing the columns you want displayed and by selecting to view a detailed or summary view of the grid. • The Manage Users drop-down button provides access to multiple actions you can take on selected users or roles. For example: edit or delete users, bulk user import, copy user from another project, resend password and email users. • Add, view, and edit project roles by selecting the Manage Roles button. • Use the Gear icon from the Main Grid to take quick actions on team members. You can add, delete users, email users or resend password.

May 2022

Feature	Description
Merge Login IDs	<p>You can now merge two user accounts using the Merge Login ID option. Use this feature to merge an old or incorrect user account with a new or correct user ID. This option will let you copy all your projects, roles, sections, categories, phases and email notifications from one user account to another. When the accounts are successfully merged, you will be left with one user account which has all the contents of the merged account. Use care when merging accounts as this option cannot be undone and the merged account is disabled and cannot be recovered. The Merge Login ID option is displayed on the My Account page.</p>
Customer Service Portal	<p>Use the Ask a Question form on the Oracle Customer Service portal to create Service Requests (SRs) that route directly to our Support team.</p>

April 2022

Feature	Description
New Actionable Emails	<p>A new actionable button has been added to the email that is sent to the reviewers/architects for log types 1,2,3 and 8. This email is triggered when an architect submits a file for review and the general contractor rejects the item. Reviewers can choose to review and update the item by clicking on the Update Review button from the email.</p>
Filter Dates	<p>You can now easily filter the Date column by selecting the Date Picker from the Filter row. The Date Picker allows you to select from the following option: Today, This Week, Next Month, or enter custom From and To Dates. This filter option is available for all columns displaying dates in the following logs in Standard view: Project Log, Submittal (Type 1), Closeout (Type 2), RFI (Type3), RFP (Type 4), ASI (Type 5), Design Planroom (Type 6, Public Planroom, Photos (Type 7), and Review (Type 8).</p>

March 2022

Feature	Description
Upload From My Library on the Manage Drawings Page	A new option added to the Manage Drawings page now allows you to easily upload or replace multiple drawings that are saved in Submittal Exchange. You can select drawings saved in Submittal Exchange using the My Library link on the Manage Drawings page.
Removed Support for Document Viewer	We have removed the option to view non-PDF files within Submittal Exchange. To view these files, you must first download it onto your local machine and then use any local application to view them.

February 2022

Feature	Description
Project Index Search	A new search box on the Project Index page now allows you to easily search for projects by entering a project name or number.

January 2022

Feature	Description
Manage Drawings for Log Type 6	<p>A new Manage Drawings page now allows you to easily manage, upload, replace, or delete multiple files at the same time without navigating back and forth. For Log Type 6 (Design Documents, Planroom, and Drawings), select the Manage Drawings link from the top (Classic View) or from the Actions drop-down menu (Standard View). From the Manage Drawings page you can:</p> <p>From the Manage Drawings page you can:</p> <ul style="list-style-type: none"> • Replace files by dropping and dragging files on to the right pane (Files pane) or by selecting Browse. The system intelligently 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. • Add new files by selecting Add New button from the grid. A new line is displayed on the grid. • Delete files by selecting the red x next to files. Note you are deleting the file only from the Manage Drawings page and not from the log. • Update multiple remarks by selecting the Edit Remarks for All button. This option will replace all existing comments. • Flatten PDF files.

What's New in Submittal Exchange in 2021

December 2021

Feature	Description
Undo multiple Deleted Items	Undo multiple Deleted Items For all project logs that have the option to delete multiple items, you can now use the undo (Undelete Items) option to undo multiple deleted items. Select to undo all deleted items or selectively choose items. Use the Deleted Items filter to view the deleted items, and select Gear> Undelete Items. The events are audited and can be viewed under Event History.

Feature	Description
New Actionable Emails	New actionable email buttons have been added to the email that is sent to reviewers for the RFP log. This email is triggered when an Architect submits a file for review. The Subcontractor, Reviewer 2 and Reviewer 3 can choose to review the item by clicking on the Review and Submit button from the email.

November 2021

Feature	Description
Enhanced Project Index Page	We have enhanced the Project Index page to improve usability and functionality by adding the options to color code project rows, sort projects, and change the order of projects displayed. You can now easily identify and categorize the projects displayed on your Project Index page by highlighting a project row with a color. Use the Paint Brush icon to select a color for a project row. In addition, you can sort projects, and change the order of projects displayed.
Edit Expected Items	New check box added to the Edit Expected Items page allows you to select or de-select all items on the page.
Enhanced Public Planroom	An enhanced version of the grid is displayed on the Planroom page. This version of the grid allows you to perform more tasks. You can filter, sort by date, expand/collapse categories, and download the file by selecting the description.

October 2021

Feature	Description
View Project Team Page Based on Roles	As a project leader, you can now choose to view the Project Team page based on 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.
Enhanced Related To Links	Easily access and manage related items from the Project Log page. Select the Link icon under the Related To column to view the linked items, easily navigate to linked pages, add new links, and manage existing links. The Manage Related To Links dialog box allows you to add, modify, and delete links.
Actionable Email Buttons	New actionable email buttons have been added to the email that is sent to the initial design reviewers for the Submittal, Closeout, RFI, and PR logs. This email is triggered when a GC submits a file for review to the design team. The reviewers can choose an action by selecting either the Review and Submit button or the Add Comments and Submit button from the email.

September 2021

Feature	Description
Upload Files from My Library	Users now can also upload files from both My Library and local computer in one go on type 6 log.
Enhanced Project navigation	We have now made it easier to navigate back to the last project by adding Back to last project link on the User Info , Company Info , Billing , Reports and Message center pages. This was earlier available on only User Info page.

August 2021

Feature	Description
Updated the Logic to Calculate the Days Open in Reports for Log Type 11	We've updated the logic behind how the Days Open field is calculated in reports for logs. It is now more straightforward and uses the From Date and To Date fields to calculate how long an item is open. Users can modify the From and To dates for an accurate count of the Days Open field.
Improved User Registration	We have improved the user registration process. You can now modify certain auto-populated fields. In addition, you can now add or modify your office location.
Enhanced Event History Notifications	To easily identify events that were responded to via email, we have added the text Via Actionable Email next to those events.
Custom Label for Supplier or Manufacturer	Contact your Submittal Exchange administrator to add a supplier or manufacturer label to your projects.

July 2021

Feature	Description
Report Distribution via Email	Email a report output link to company users or team members each time a custom or saved report is run. Use the Send as attachment link output option when creating or modifying a report to select this option. The Distribution List link allows you to add users to the distribution list. Each time a report is run, the selected users will receive an email with a link to the report output. Users can choose to unsubscribe from this list anytime from either the email or from the Distribution List tab by selecting View Details .
Distribution List Tab	View a list of users that were added to receive the report output from the Distribution List tab. Access this tab by selecting the Gear menu next to a report and selecting View Details. From the Distribution List tab, you can view: <ul style="list-style-type: none"> The status of a user's subscription. Details of the users added to the list. Subscribe or Unsubscribe users from the distribution list. You can now easily view and manage stamps for your company. Administrators and Submittal Exchange users can use the Manage Company Stamps button from the Company Info page to view, add, edit, and delete stamps.

May and June 2021

Feature	Description
Manage Custom Stamps	You can now easily view and manage stamps for your company. Administrators and Submittal Exchange users can use the Manage Company Stamps button from the Company Info page to view, add, edit, and delete stamps.
PDF Flattening	New option on the Preferences page allows you to select if all uploaded PDF files should be flattened or not.

April 2021

Feature	Description
Updated the Logic to Calculate the Days Open in Reports for Logs 1, 2, 3, 4 and 8	We've updated the logic behind how the Days Open field is calculated in reports for logs. It is now more straightforward and uses the From Date and To Date fields to calculate how long an item is open. Users can modify the From and To dates for an accurate count of the Days Open field.

February 2021

Feature	Description
View and Add Project Phases	General contractors, architects, and project leaders can now view and add phases to their projects from the Project Preferences page. Your Administrator must first enable the addition of phases. Use the View/Add Phases button to view or add project phases.
Select Phases for Expected Items	When editing expected items or expected dates, you can now also select a phases for each item.
Submittal Exchange for Outlook	You can now upload documents to log types 4 through 8.
View Project Size	The approximate size of your project is now displayed on the Project Preferences page.

What's New in Submittal Exchange in 2020

October 2020

Feature	Description
Disable User Account	With Submittal Exchange 20.10, you can now easily disable user accounts for users who will be leaving your company. From the Manage Users page under Company Info, you now have the option to disable selected users. An email is sent to the user indicating that their account will be disabled within seven working days. In addition, the user is also notified when they attempt to log in. If the account was disabled in error, the user has the ability to cancel the disable request when they log in to the application.
Frequency of Email Notification	When adding or editing team members, you can now choose how frequently the team members should receive email notifications.
Alert Icon Enhancement	The Alert icon is now set to display the alert details without selecting the Alert icon. The alert icon is expanded to show the alert details when a user first logs in or when the alert text is modified or new text is added.
Hidden Column Alert	An alert message is displayed if the log you are viewing has hidden columns. You can select the Table Settings icon from within the alert to show the hidden columns, or hide other columns.

September 2020

Feature	Description
Revamped Event History Tab	The newly redesigned Event History tab now allows you to easily filter and search for events recorded for your project. You can filter events by type, users, and date. In addition to having more filters, the page now supports printing, searching, and clearing all or selected filters.
Undelivered Email Addresses	The Project Team page and project archives now display a red indicator next to user emails to show undelivered email addresses.
Event Tracking	An event is now triggered when project users are added or disabled.

August 2020

Feature	Description
Enhanced Photo Gallery	Easily upload multiple photos without navigating to your gallery. Select the Add link directly from the Photos Log page to add photos. In addition, you can now add comments and change the orientation of your photos. The Edit link on the Photos Log page provides easy access to the Edit Gallery page.
Enhanced Mobile Experience	You can now seamlessly view, edit, and add photos to your gallery from your mobile device.

July 2020

Feature	Description
Create submittals from specification manual PDF	The import data feature, or specification parsing logic, has been enabled for all Project Leaders who have manage sections access. Project leaders can upload their specification manual in PDF format to create submittal items within a selected log. The tool scans the document for CSI masterformat specification names and numbers, as well as submittal items that are listed within the specification manual. Before importing, Project Leaders can use the Import Preview page to view all items that are ready to be created as submittal items, and make the necessary modification, addition, or deletion. Users will also continue to have the option to create submittal items using an Excel template.
Company Information Enhancements	Enhancements were made to the Company Info page to reduce confusion regarding the office address and help ensure the user is assigned to the correct company ID and avoid inadvertently changing company information for multiple users.

June 2020

Feature	Description
Project Milestones	Project milestones are now available for construction projects. Project leaders can manage project milestones from the Preferences tab. 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.
Project Log Type 6 (design posting log, no review)	Project Log Type 6 (design posting log, no review) is now available for construction projects. This log type is typically used for design documents and does not include a workflow review.
Project Log Type 10 (Whiteboard virtual meeting room)	This collaborative whiteboard is a whitespace for construction professionals to share ideas and to go over documents, designs or drawings.
Actionable Email Buttons	New actionable email buttons have been added for GCs using previous files as the final initiator for log types 1, 2, 3, and 8. To take action from the email, the GC can choose to Add Comments and Submit or Submit as is buttons.

May 2020

Feature	Description
Reporting has Expanded!	<p>We have expanded the reporting functionality by utilizing Oracle's BI Publisher. In addition to providing built-in reports for various logs within your project, you can now track Expected Item status and learn more about your projects using the improved reporting within Submittal Exchange.</p> <p>Some of the enhancements we have made are:</p> <ul style="list-style-type: none"> • Out of the box reports: Want more from your built-in reports? You can now save your filter and sorting options as separate reports . • Custom reports: Don't like the out of the box reports? You can now create and save your own custom reports based on fields available in the various project logs you have access to. • Schedule reports: Always running the same report weekly for meetings? Now you can schedule delivery of your reports for daily, weekly or monthly distribution.

April 2020

Feature	Description
Keeping you informed of What's New	<p>With each new release of Submittal Exchange, the What's New page will be updated to inform you of what the new features and enhancements are for each release. Access the What's New by selecting the Help icon > What's New?</p>
Submittal Exchange and Microsoft Outlook are now integrated	<p>This new integration allows users 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.</p> <p>You can upload files to individual logs (Log Types 1, 2 and 3) or My Library. From the top banner in Outlook, select Primavera Submittal Exchange to view the menu options.</p> <ul style="list-style-type: none"> • Upload to Log: Select this option to upload files to a specific log (Log Types 1,2 and 3). • 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.

Glossary

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