

Submittals

This chapter is regarding how to submit, review, and respond to submittals.

- [Creating Submittal Items](#)
- [Processing Submittal Items](#)
- [Submittal Packages](#)

Creating Submittal Items

Using the Submittals Module in Autodesk Construction Cloud (ACC)

Roles:

UF PD&C Project Manager: Submittal Managers- for control

Construction Manager: Submittal Manager

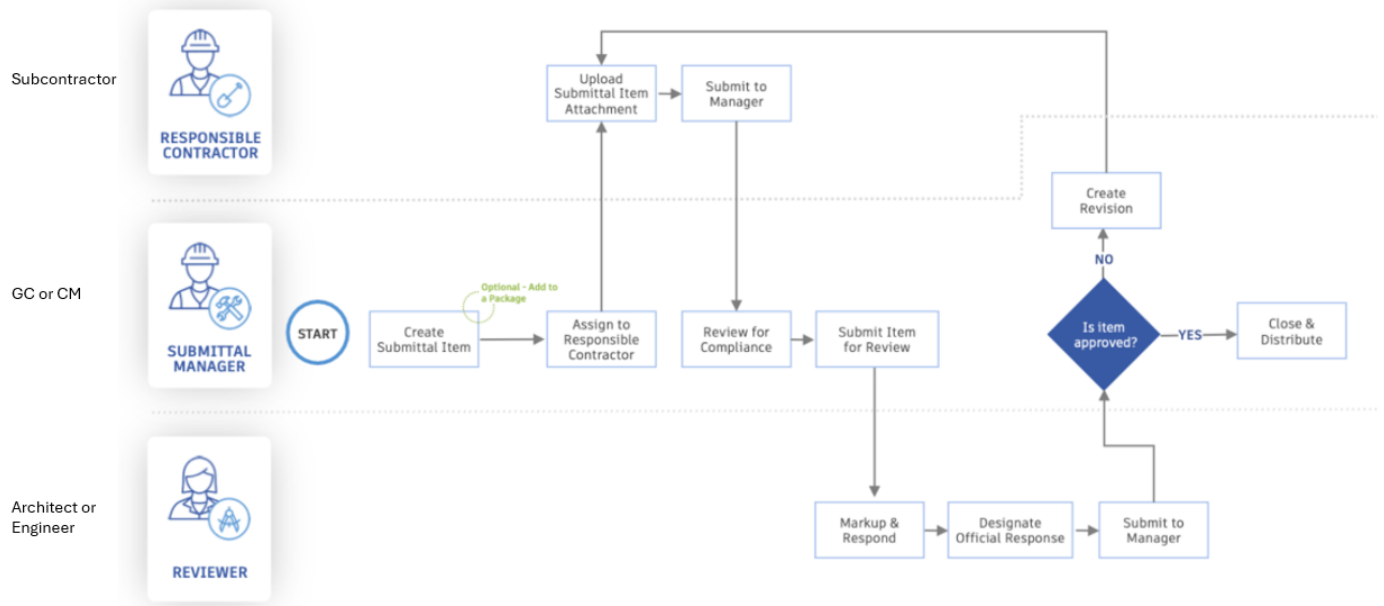
Architect/Engineer: Submittal Reviewer must be added to the review



Submittal managers have an **Assign to responsible contractor** field. There is no area for attaching documents, and the created item begins in **Required** status.

Other team members have an **Assign to manager** field, and they see an additional area for attaching documents. The created item begins in **Open** status for the manager's review.

SUBMITTAL WORKFLOW



Reminder: Submittal Managers have an Assign to responsible contractor field. The manager can initiate a submittal, but cannot initially attach documents. Since this is the University of Florida's (OWNER) project site, subcontractors are not added to the system, and the GC/CM must assign the submittal to themselves as the responsible contractor.

From the left-hand navigation panel, select **Submittals**.

Click **Create item** to open the submittal creation form.

Complete the fields as needed:

- **Spec Section:**
Select from the drop-down or click **Create new** to add a new section.
- **Sub Spec Section (optional):**
Enter a sub-section if applicable.
- **Title:**
Provide a clear, descriptive title.
- **Number:**
Enter a unique submittal number.
See: Submittal Custom Numbering for more details.
- **Description (optional):**
Add any relevant notes or context.
- **Package (optional):**
Select or create a package.
- **Type:**
Choose the appropriate submittal type.

- **Responsible Contractor / Manager:**

Assign a responsible party (only available to managers).

- **Priority:**

Set the priority level.

- **Attachments** *(optional)*:

Upload supporting documents.

- **Planning Dates** *(optional)*:

Add key dates for tracking.

- **Lead Time** *(optional)*:

Specify expected lead time.

Create another item

To quickly add multiple items, check **Create another** before clicking **Create**.

Understanding Submittal Numbering

ACC suggests the next available submittal number based on the following logic:

- **Default Method:**

The next number is the last created number incremented by 1.

Important Notes:

- The "previous number" refers to the last submittal created in the project.
- Prefixes, suffixes, and leading zeros are preserved for consistency.
- Deleted drafts, manually edited, or cleared numbers are ignored in the calculation.
- You can manually set a number if it passes validation.

Processing Submittal Items

Overview of how to process submittal items within the Submittals tool after creation.

Key Topics

- Understanding the submittal workflow
 - Working with the Workflow Table
 - Adding attachments and annotations
 - Providing review responses
 - Closing, distributing, and creating new revisions
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Submittal Workflow Overview

The Submittals tool uses built-in workflows to manage review and approval stages. Progress is tracked via the **Workflow Bar** and **Workflow Table**.

Workflow Bar

- Displays the current stage of the submittal.
- Shows **Pending review from** instead of “Reviewers” for clarity.
- Indicates **Responded: X** for completed reviews.
- Hover over:
 - **Pending review from** → reviewers who haven’t responded.
 - **Responded** → reviewers who have completed their review.
- Avatars represent users who still need to review.

Workflow Actions

Close and Distribute

- Concludes review process and distributes info to all participants.
- Closed submittals can be shared via **Bridge** or Files tool.

Create New Revision

- Generates a new version of the submittal.

- Options:
 - Assign responsible contractor.
 - Set due date.
 - Add watchers.
- **Permissions:** Submittal Managers and Project Admins can create revisions or close items (except Draft/Void).

Void

- Invalidates a submittal item when no longer relevant.
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Workflow Table

- Summarizes workflow with dates, attachments, and comments.
 - Lists reviewers who responded first in chronological order.
 - **Response/Action column** allows actions like approval or request for revisions.
 - Supports selecting review templates or editing workflows.
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Planning Section

Includes key dates:

- Required Date
 - Required Approval Date
 - Required on Job Site Date
 - Lead Time
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Activity Log

- Tracks all activity related to the submittal.
 - Supports comments and @mentions for collaboration.
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Reference Section

- Links submittal to other project elements: Assets, Files, Forms, Issues, PCOs, Photos, RFIs, Schedule, Sheets.
 - Enhances cross-referencing and alignment.
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Submittals List View

- New **Pending action from** column after **Ball in court**.
 - Shows reviewers who haven't responded yet.
 - Highlights current user if pending.
 - Displays "+X more" for multiple reviewers.
 - Tooltip shows full list on hover.
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Assign Roles and Companies

- Assign roles/companies as Submittal Managers, Responsible Contractors, and Reviewers.
- Benefits:
 - Flexible review management.
 - Automatic permissions.
 - Bulk actions supported.
- Assignment points:
 - When creating submittals.
 - In custom templates.
 - In Review Builder.
 - In item details.
- Dropdown menu includes Members, Roles, Companies.
- Notifications sent to all users in assigned roles/companies.

Submittal Packages

How to create and manage custom packages to group related submittals.

What Are Submittal Packages?

Packages allow you to bundle multiple submittals that pertain to the same portion of work (e.g., by location or project area). They improve organization and streamline communication.

Benefits:

- **Broader Categorization:** Group by physical aspects like floors or rooms.
 - **Enhanced Organization:** Easier tracking and structured workflows.
 - **Streamlined Communication:** Team members quickly identify relevant areas.
 - **Efficient Review Process:** Focus reviews on specific project areas.
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Viewing Modes

1. Items List View (Default):

- Displays all submittals in a flat list.
- Best for cross-package searching, filtering, and bulk actions.

2. Package List View:

- Groups items by package.
- Provides clear visual separation and package-level info.
- Ideal for location-based or phase-based workflows.

Switch Views: Use the toggle in the Submittals interface.

Create a Submittal Package

Steps:

1. From the Items list, click **Create package**.
2. Select **Spec section**.
3. Enter **Title**.
4. (Optional) Check **Create another** for multiple packages.
5. Click **Create**.

Packages can be edited or deleted later.

Add Items to a Package

Two methods:

- Open an item and select the package from the drop-down.
- Select multiple items and use **Add to package** bulk action.

Permissions: Only Submittal Managers and Project Administrators can add items to packages.