

How to Add an Item and Create a New Submittal Package

1. Navigate to <https://app.e-builder.net/da2/Submittals/SubmittalRegister.aspx?PortalID=8d2f0cec-387a-4919-bf3b-980018e82460>
2. Click "Add Item"

The screenshot shows the Submittal Register interface. At the top, there are buttons for 'Clear' and 'Filter'. Below that, there are buttons for 'Update Status', 'Forward for Review', 'Send to Sub', 'Add to Package', 'Add Item' (highlighted with an orange circle), 'Delete', 'Import', and 'Submit to GC'. The table below has the following columns: Item Details, Title, #, Rev #, Package #, Spec Section, Sub Section, Category, Status, Submittal Coordinator, Held By, and Reviewers.

| Item Details | Title | # | Rev # | Package # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By | Reviewers |
|--------------|--|---|-------|------------|--------------|-------------|--------------|--------|-----------------------|-----------------|-----------|
| | Demolition PreDemo Photos | 1 | 1 | 2-024119-1 | 024119 | 001 | Photos | NEW | | Lindsay Nichols | |
| | Rough Carpentry Lumber, Fire Treatment, Blocking & Fasteners | 2 | 0 | 2-345685-0 | 061053 | 001 | Product Data | NEW | | | |
| | Penetration Firestopping | 3 | 1 | 2-078413-1 | 078413 | 001 | Product Data | NEW | | Lindsay Nichols | |
| | Flush Wood Doors SD | 5 | 1 | 1-081416-1 | 081416 | 002 | Shop Drawing | NET | | Lindsay Nichols | Reviewers |
| | Flush Wood Doors Sample | 6 | 0 | 2-0 | 081416 | 003 | Sample | NEW | | | |
| | Hollow Metal | | | 1- | | | | | | | |

3. Complete all required fields

The screenshot shows the 'Add Submittal Item' form. On the left is a 'Project Menu' for the University of Maryland Baltimore, with 'Submittals' selected. The form has a 'Details' section with the following fields: Project (**Training Project), Title (* Submittal Title), Number, Description, Package (None), Spec Section (*), Category (* Please Select..), Responsible Sub/Manufacturer, and a 'Save' button. Below the details is a 'Date Details' section with a table for Target and Actual dates.

| Date Details | |
|-----------------------------|----------------------------------|
| Target | Actual |
| Date Due From Subcontractor | Date Received From Subcontractor |
| Submit For Review Due Date | Date Submitted For Review |
| Review Complete Due Date | Date Review Completed |

- Priority is Normal unless otherwise is specified.

Projects Planning Forms Processes Documents Calendar Contacts ...

Hidden Projects

Add Submittal Item

Details Save & Add New Save Cancel

| | | | |
|------------------------------|--------------------|----------------|--------------------|
| Project | **Training Project | Project Number | 17-318* |
| * Title | Submittal Title | Status | NEW |
| Number | | Item Status | |
| Description | | Priority | Normal |
| Package | None | Revision | |
| * Spec Section | 1A | Sub Section | |
| * Category | Shop Drawing | Commitment | Select a commitmer |
| Responsible Sub/Manufacturer | | | |

Date Details

| Target | Actual |
|-----------------------------|----------------------------------|
| Date Due From Subcontractor | Date Received From Subcontractor |
| Submit For Review Due Date | Date Submitted For Review |

- Click "Save".

Projects Planning Forms Processes Documents Calendar Contacts ...

Hidden Projects

Add Submittal Item

Details Save & Add New Save Cancel

| | | | |
|------------------------------|--------------------|----------------|--------------------|
| Project | **Training Project | Project Number | 17-318* |
| * Title | Submittal Title | Status | NEW |
| Number | | Item Status | |
| Description | | Priority | Normal |
| Package | None | Revision | |
| * Spec Section | 1A | Sub Section | |
| * Category | Shop Drawing | Commitment | Select a commitmer |
| Responsible Sub/Manufacturer | | | |

Date Details

| Target | Actual |
|-----------------------------|----------------------------------|
| Date Due From Subcontractor | Date Received From Subcontractor |
| Submit For Review Due Date | Date Submitted For Review |

- Click "Submittal Register"

- > Details
- > Planning
- > Forms
- > Processes
- > Documents
- > Schedule
- > Cost
- > Contacts
- > Calendar
- > Bidding
- ▼ **Submittals**
 - Submittal Register
 - Submittal Packages
 - Update Dates
 - Settings

| | | | |
|------------------------------|-----------------|-------------|-------|
| Title | Submittal Title | Status | NEW |
| Number | 81 | Item Status | Draft |
| Description | | Priority | Norm |
| Package # | | Revision | 0 |
| Spec Section | 1A | Sub Section | |
| Category | Shop Drawing | Commitment | |
| Responsible Sub/Manufacturer | | | |
| Item Held By | | | |

Documents (0) | Comments (0) | Custom Fields (2) | Revisions (0)

| File Name ▲ | Attached By | Date Attached |
|--|-------------|---------------|
| Drag and drop files here to upload, or browse. | | |

7. Locate the submittal item you just added and Click the checkbox.

| | | | | | | | | | |
|--------------------------|--|--|----|---|-----|----------|-------|--------------|-----|
| <input type="checkbox"/> | | Accessories | 72 | 0 | | 230000 | 2.10A | Product Data | NEW |
| <input type="checkbox"/> | | Automatic Temperature Controls | 73 | 0 | | 230000 | 2.12A | Product Data | NEW |
| <input type="checkbox"/> | | Electrical Raceways, Boxes, Wire & Devices | 74 | 0 | | 260000 | 2.2A | Product Data | NEW |
| <input type="checkbox"/> | | Communications Horizontal Cabling | 75 | 0 | | 271500 | 1.6A | Product Data | NEW |
| <input type="checkbox"/> | | Fire Alarm | 76 | 0 | | 280000 | 1.8A | Product Data | NEW |
| <input type="checkbox"/> | | test | 77 | 0 | | 123 | | Calculations | NEW |
| <input type="checkbox"/> | | Test2022 | 78 | 1 | 4-1 | Test2022 | | Calculations | N ▼ |
| <input type="checkbox"/> | | test | 79 | 0 | | A1 | | Test Report | NEW |
| <input type="checkbox"/> | | test | 80 | 0 | | 123 | | Calculations | NEW |
| <input type="checkbox"/> | | Submittal Title | 81 | 0 | | 1A | | Shop Drawing | NEW |

8. Click "Add to Package".

Submittal Package # [] - [] - Rev []

Responsible Sub/Manufacturer []

Custom Field 1 [Please select a] []

Custom Field 2 [Please select a] []

Sub Section []










Submittal Coordinator [Please select...]

Reviewer []

[Clear] [Filter]

Group By [None] Page [1] of 1 Show [100] per page 1 item(s) selected

[Update Status] [Forward for Review] [Send to Sub] [Add to Package] [Add Item] [Delete] [Import] [Submit to GC]

| <input type="checkbox"/> | Item Details | Title | # | Rev # | Package # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By | Reviewers |
|--------------------------|---|--|---|-------|------------|--------------|-------------|--------------|--------|-----------------------|-----------------|-----------|
| <input type="checkbox"/> |    | Demolition PreDemo Photos | 1 | 1 | 2-024119-1 | 024119 | 001 | Photos | NEW | | Lindsay Nichols | |
| <input type="checkbox"/> |    | Rough Carpentry Lumber, Fire Treatment, Blocking & Fasteners | 2 | 0 | 2-345685-0 | 061053 | 001 | Product Data | NEW | | | |
| <input type="checkbox"/> |    | Penetration | | | 2- | | | | | | Lindsay | |

9. Click the "Create new submittal package" field.

Responsible Sub/Manufacturer []

Custom Field 1 [Please select a] []

Custom Field 2 [Please select a] []

Submittal Coordinator [Please select...]

Reviewer []

[Clear] [Filter]

Group By [None] Page [1] of 1 Show [100] per page 1 item(s) selected

[Update Status] [Forward for Review] [Send to Sub] [Add to Package] [Add Item] [Delete] [Import] [Submit to GC]













Add to Package

Create new submittal package

Select existing submittal package

[Please select a package...]

[Continue] [Cancel]

| <input type="checkbox"/> | Item Details | Title | # | Rev # | Package # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By | Reviewers |
|--------------------------|---|--|---|-------|------------|--------------|-------------|--------------|--------|-----------------------|-----------------|-----------|
| <input type="checkbox"/> |    | Demolition PreDemo Photos | 1 | 1 | 2-024119-1 | | | | | | Lindsay Nichols | |
| <input type="checkbox"/> |    | Rough Carpentry Lumber, Fire Treatment, Blocking & Fasteners | 2 | 0 | 2-345685-0 | | | | | | | |
| <input type="checkbox"/> |    | Penetration Firestopping | 3 | 1 | 2-078413-1 | 078413 | 001 | Product Data | NEW | | Lindsay Nichols | |
| <input type="checkbox"/> |    | Flush Wood Doors SD | 5 | 1 | 1-081416- | 081416 | 002 | Shop Drawing | NET | | Lindsay Nichols | Reviewers |

10. Click "Continue".

Custom Field 1: Reviewer:

Custom Field 2:

Group By: Page: of 1 Show: per page 1 item(s) selected

| | Item Details | Title | # | Rev # | Package # | | | | | | | | Held By | Reviewers |
|--------------------------|--------------|--|---|-------|------------|--------|-----|--------------|-----|--|--|--|-----------------|-----------|
| <input type="checkbox"/> | | Demolition PreDemo Photos | 1 | 1 | 2-024119-1 | | | | | | | | Lindsay Nichols | |
| <input type="checkbox"/> | | Rough Carpentry Lumber, Fire Treatment, Blocking & Fasteners | 2 | 0 | 2-345685-0 | | | | | | | | | |
| <input type="checkbox"/> | | Penetration Firestopping | 3 | 1 | 2-078413-1 | 078413 | 001 | Product Data | NEW | | | | Lindsay Nichols | |
| <input type="checkbox"/> | | Flush Wood Doors SD | 5 | 1 | 1-081416-1 | 081416 | 002 | Shop Drawing | NET | | | | Lindsay Nichols | Reviewers |
| <input type="checkbox"/> | | Flush Wood Doors | 6 | 0 | 2-081416 | 081416 | 003 | Sample | NEW | | | | | |

Add to Package

Create new submittal package
 Select existing submittal package

11. Give your submittal package a name

Home Dashboard **Projects** Planning Forms Processes Documents Calendar Contacts

UNIVERSITY of MARYLAND BALTIMORE

Project Menu

- Details
- Planning
- Forms
- Processes
- Documents
- Schedule
- Cost
- Contacts
- Calendar

Create Submittal Package

Details

Project: **Training Project
 Project Number: 17-318*
 Submittal Package #: 9 - - 0
 * Submittal Package Name:
 Description:
 Trade:

Custom Fields

There are no custom fields for this submittal package.

Page: of 1 Show: per page

| Title | # | Rev # | Spec Section | Sub Section | Category |
|---|----|-------|--------------|-------------|------------|
| <input checked="" type="checkbox"/> Submittal Title | 81 | | 1A | | Shop Drawi |

12. Click "Save".

Submittal Package Name

 Description

 Trade

Custom Fields

There are no custom fields for this submittal package.

Page 1 of 1 Show 25 per page

| Title | # | Rev # | Spec Section | Sub Section | Category | Status |
|---|----|-------|--------------|-------------|--------------|--------|
| <input checked="" type="checkbox"/> Submittal Title | 81 | | 1A | | Shop Drawing | NEW |

13. Click this checkbox.

- > Details
- > Planning
- > Forms
- > Processes
- > Documents
- > Schedule
- > Cost
- > Contacts
- > Calendar
- > Bidding
- > **Submittals**
 - Submittal Register
 - Submittal Packages
 - Update Dates
 - Settings

| | | | |
|----------------------|---------------------|-----------------------|-------|
| Title | Package Name | Status | Draft |
| Description | | Trade | |
| Submittal Package # | 9-0 | Created By | Hall, |
| Date Created | 09.26.2024 12:08 PM | Baseline Finish Range | |
| Items Held By | | | |
| Baseline Start Range | | | |

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page

| <input type="checkbox"/> | Item Details | Title | # | Rev # | Spec Section | Sub Section | Category | Status | Submittal Coordinator |
|-------------------------------------|--------------|-----------------|----|-------|--------------|-------------|--------------|--------|-----------------------|
| <input checked="" type="checkbox"/> | | Submittal Title | 81 | 0 | 1A | | Shop Drawing | NEW | |

14. Click "Send For Review".

| | | | |
|----------------------|---------------------|-----------------------|--------------|
| Project | **Training Project | Project Number | 17-318* |
| Title | Package Name | Status | Draft |
| Description | | Trade | |
| Submittal Package # | 9-0 | Created By | Hall, Taylor |
| Date Created | 09.26.2024 12:08 PM | Baseline Finish Range | |
| Items Held By | | | |
| Baseline Start Range | | | |

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page: 1 of 1 Show: 10 per page 1 item(s) selected

Send for Review Submit to GC
Send to Sub Add Items Remove Items

| <input type="checkbox"/> | Item Details | Title | # | Rev # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By | Reviewers |
|-------------------------------------|--------------|-----------------|----|-------|--------------|-------------|--------------|--------|-----------------------|---------|-----------|
| <input checked="" type="checkbox"/> | | Submittal Title | 81 | 0 | 1A | | Shop Drawing | NEW | | | |

15. Click this dropdown to select the Submittal Coordinator

ider. ↑ ?

Review Send for Review Cancel

Submittal Coordinators: Taylor Jane Doe (AE Test Company)

How Complete Due Date: 10.17.2024

CC Roles:

- Client
- Taylor Jane Doe (AE Test Company)
- Cost Estimator
- Design Professional Lead
- Design Sub Consultant
- DNC Team Leads
- eB Admin
- Members

CC Users:


- Borgerding, Anna (University of Maryland, B
- Brown-Tuck, Kisha (University of Maryland, i
- Demo, Abatement (Test)
- Doe, Taylor Jane (AE Test Company)
- Hollon, Terry (University of Maryland, Baltim
- Lewinski, Robert (University of Maryland, Ba

16. Click "Open the calendar popup".

Send for Review

Send for Review

* Submittal Coordinators Taylor Jane Doe (AE Test Company) v

* Review Complete Due Date 10.17.2024 

CC Roles

- Client
- Commissioning Agent
- Construction Professional
- Construction Trade Contractor
- Cost Estimator
- Design Professional Lead
- Design Sub Consultant
- DNC Team Leads
- eB Admin
- Members

CC Users


- Borgerding, Anna (University of Maryland, B
- Brown-Tuck, Kisha (University of Maryland, f
- Demo, Abatement (Test)
- Doe, Taylor Jane (AE Test Company)
- Hollon, Terry (University of Maryland, Baltim
- Lewinski, Robert (University of Maryland, Ba

17. Select the due date.

Send for Review

Send for Review

* Submittal Coordinators Taylor Jane Doe (AE Test Company) v

* Review Complete Due Date 10.17.2024 

October 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 29 | 30 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |

CC Roles

- Commissioning Agent
- Construction Professional
- Construction Trade Contractor
- Cost Estimator
- Design Professional Lead
- Design Sub Consultant
- DNC Team Leads

CC Users

- Borgerding, Anna (University of Maryland, B
- Brown-Tuck, Kisha (University of Maryland, f
- Demo, Abatement (Test)
- Doe, Taylor Jane (AE Test Company)
- Hollon, Terry (University of Maryland, Baltim
- Lewinski, Robert (University of Maryland, Ba
- Mavrinac, John (University of Maryland, Balt
- Omagbe, Precious (University of Maryland, f
- s, s (ProcessConsultant)

18. Click "Send for Review"

Review

Send for Review **Cancel**

| | |
|---------------------------|--|
| Project Coordinators | <input type="text" value="Taylor Jane Doe (AE Test Company)"/> |
| Project Complete Due Date | <input type="text" value="10.17.2024"/> |
| CC Roles | <div><div><ul style="list-style-type: none">ClientCommissioning AgentConstruction ProfessionalConstruction Trade ContractorCost EstimatorDesign Professional LeadDesign Sub ConsultantDNC Team LeadseB AdminMembers</div><div><input type="button" value="➤"/> <input type="button" value="➤"/></div><div><input type="text"/></div></div> |
| CC Users | <div><div><ul style="list-style-type: none">Borgerding, Anna (University of Maryland, BBrown-Tuck, Kisha (University of Maryland, fDemo, Abatement (Test)Doe, Taylor Jane (AE Test Company)Hollon, Terry (University of Maryland, BaltimLewinski, Robert (University of Maryland, Ba</div><div><input type="button" value="➤"/> <input type="button" value="➤"/></div><div><input type="text"/></div></div> |