



Quick Guide: Submittal Workflow

How to workflow a submittal in Inertia

1

Select the Submittals tab and then the Submittal List tab

The screenshot shows the top navigation bar with tabs: Dashboard, Comm & Msg, Project Photos, **Submittals**, RFI's, Change Log, Schedule, WAN, Inspection, DDNC Issue Log, Calendar, and Observations. Below this, a sub-menu has tabs: Build Submittal, **Submittal List**, Submittal LEED, and Submittal Register. A table of submittals is visible with columns: New Project Submittal ID, Package ID, Specs, Spec description, Package Title, and Draft ID. Two rows are highlighted: one with ID 0128 and Package ID 030000-01-00, and another with ID 0127 and Package ID 050150-01-00.

2

The screenshot shows a detailed view of the Submittal List table. The table has columns: New Project Submittal ID, Package ID, Specs, Spec description, Package Title, Draft Id, and Register ID. The row for submittal ID 0128 is highlighted in red. The table also includes a 'Group by Company' dropdown and a 'Refresh' button.

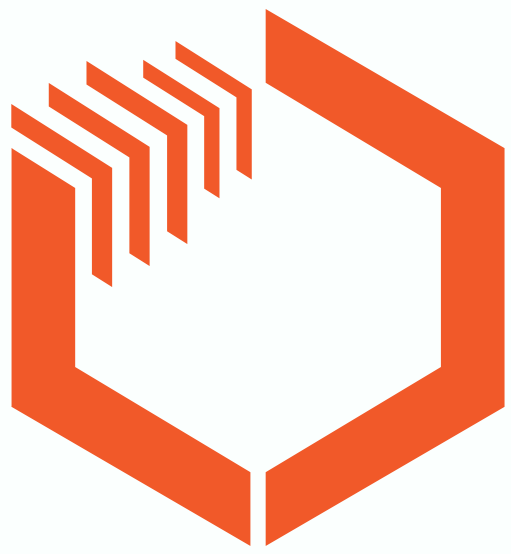
Find and click the submittal you want to open and click the blue number

Submittal details and history can be reviewed here. Use the options on the top right to edit, reassign, or request comment. Accounts with permission can update the status by clicking Status Package

3

The screenshot shows the 'Submittal Details' page for submittal 0128. The status is 'Under Review'. The page is divided into several sections: Submittal Details (with fields for ID, dates, draft ID, etc.), Related Items (showing 0006 - GP-01), Discussion Board (with a Public Comments section), and a Comment input area with a rich text editor and a 'Submit' button. The 'Submit' button is highlighted with a red box.

Leave comments here and click Submit to save them



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Select a Package Status that will be submitted and reported to the team. Inertia automatically notifies users of important updates and changes

Associated files appear here

Type comments or notes here

Package: Select Package Status

- Approved as Noted
- Approved as Submitted
- Draft
- Information Only
- Not Approved
- Register Item
- Resubmit Noted Portion Only
- Resubmittal Not Required
- Review Not Required by Contract Documents
- Review Only / No Approval Action Required
- Revise Resubmit
- Under Review
- Void

5

Click Submit on the bottom right to save the status change

Submit

Success
Action has been completed successfully

OK

6

The status change will be displayed in the Submittal Details under Status:. Other users will be notified automatically of the change.

You're done!

Submittal | Submittals List | Submittal LEED | Submittal Register | 0128

Submittal Details		Status: Approved as Submitted		Related Items
Submittal ID:	030000-01-00	Completion Date:	0000-00-00	0006 - GP-01
Trade Partner Due Date:	0000-00-00	Reviewer Due Date:	0000-00-00	
Date Submitted:	2019-08-28 14:52:35	Assigned To:	Test QC	
Draft ID:	7629	Submittal Group Number:	0035	
New Project Submittal ID:	0128	Created By:	Inertia Design	
Group Submittal ID:	0035	Sub-Breakdown:	Increment 2 - Middle Work	
Spec Section:	03 00 00	Date Submitted:	2019-08-28 14:52:35	
Breakdown:	oshpd	Approved Date:	2019-08-28 15:02:13	
Company:	Big Contractor Co	Secondary Reviewer:	Test DesignPro2	
Date Due:	0000-00-00	REV Number:	0	
Primary Viewer:	Test QC			
Days in Status:	0			
Package Title:	How to review a submittal			

Discussion Board
Public Comments
2019-08-28 15:01:15
This looks good