SpecsIntact eLearning Modules Transcript

Module: Chapter 3 - The Submittal Wizard

We highly recommend that you view the corresponding eLearning Module visual representation of the subject matter.

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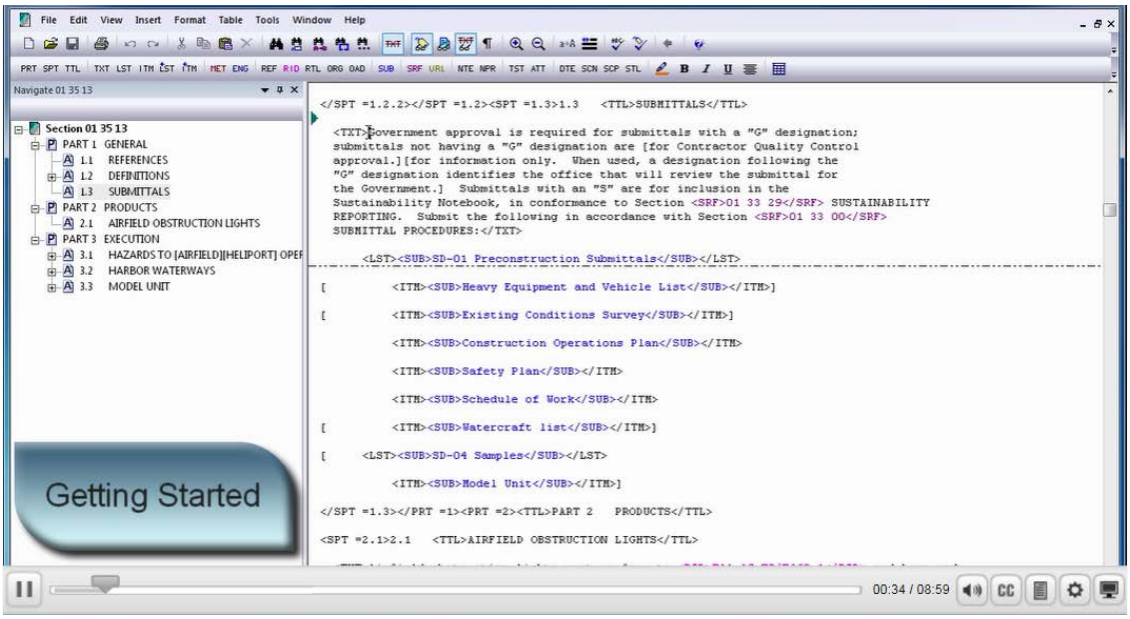
In order to use the Submittal Wizard, you must have v4.6.0 or newer installed on your system. Before we get started, let's talk about Submittals. Submittals are required primarily for quality assurance and quality control of critical project elements. Submittals are one of the design professional's best tools to ensure that a construction project is completed in accordance with the contract documents. The Submittal Descriptions along with the Classification and Reviewer Codes are only listed in the Submittal Article, whereas Submittal Items are listed in the Submittal Article and the Sections text. Submittal items must be used identically in both locations, but they are not case sensitive! To learn more about Submittals, their formatting and the proper methods for editing. I strongly recommend that you watch the 'Working With Submittals' module.



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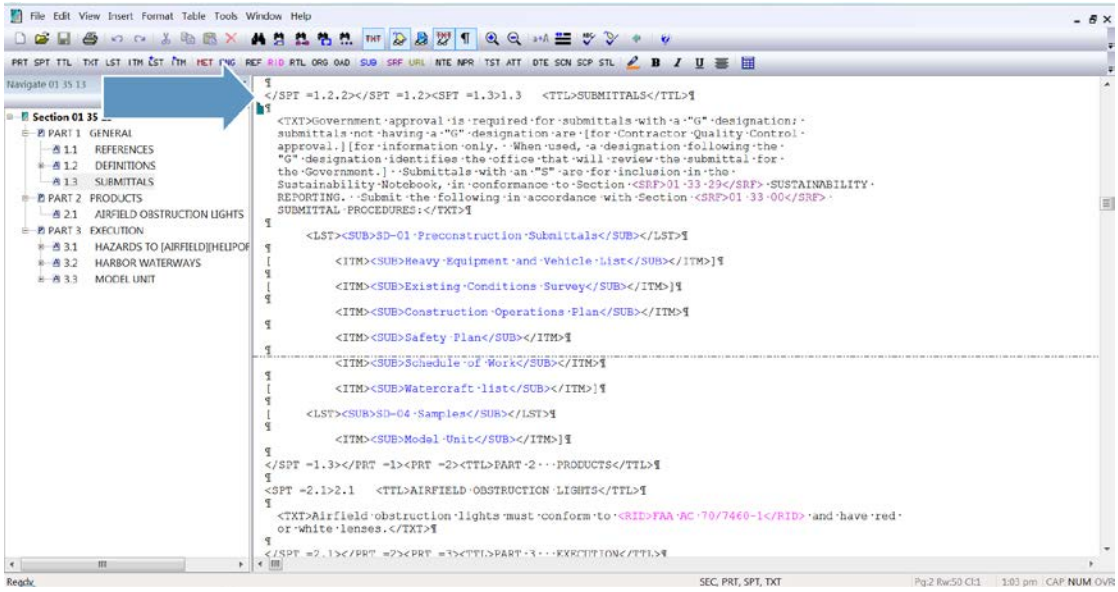
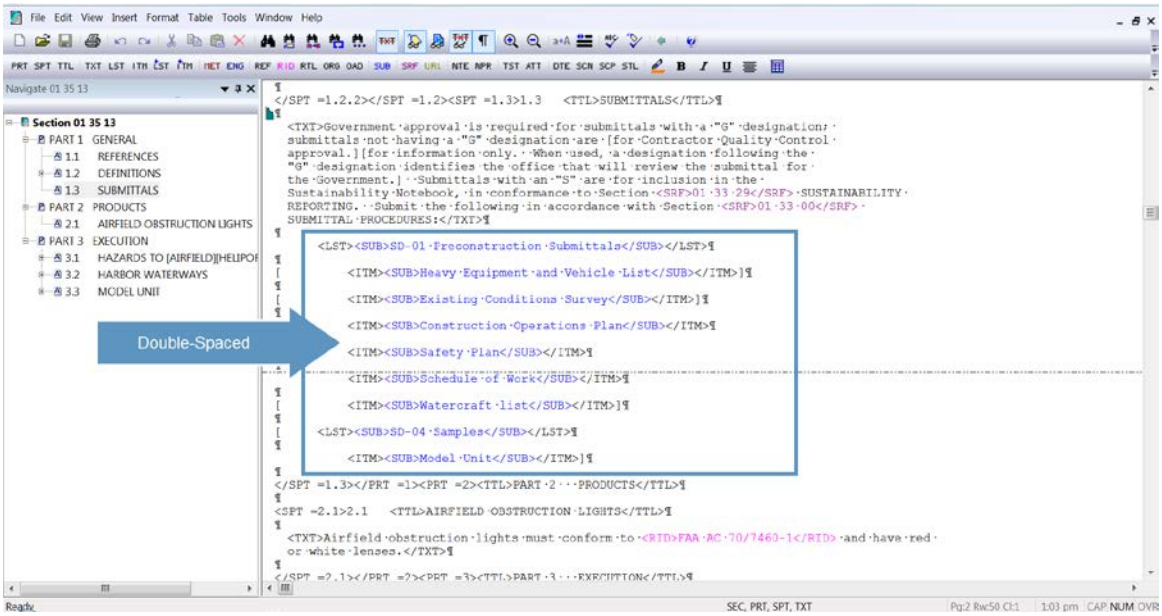
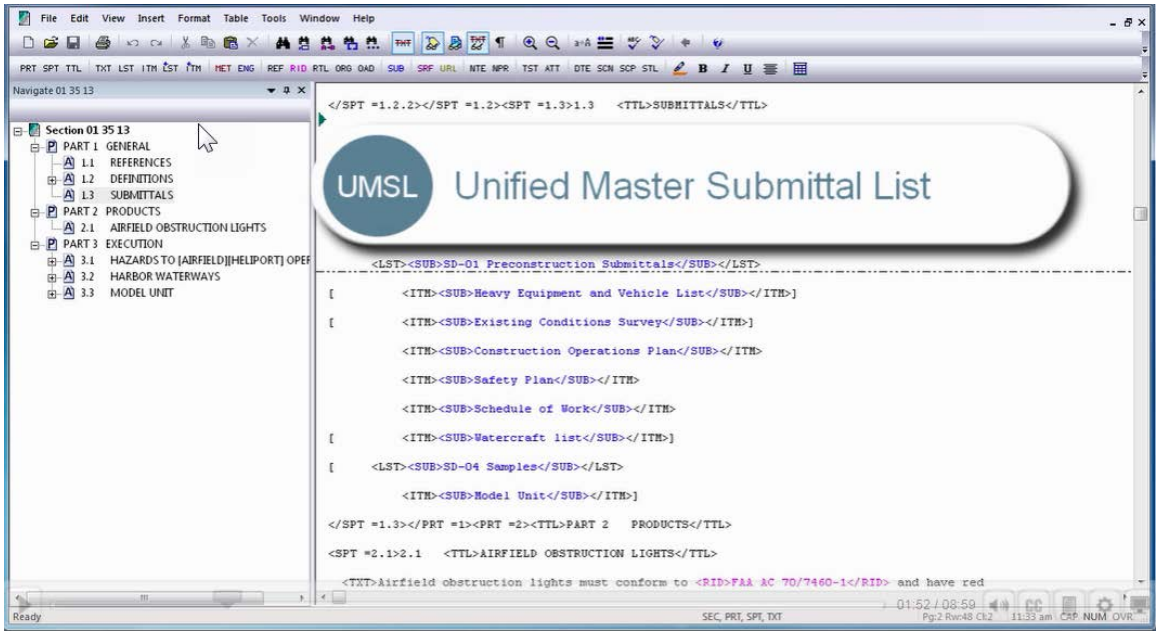
The Submittal Wizard is one of the Editor's advanced editing tools that automates the insertion of Submittals within the Submittal Article and Section text by using SUB tags to identify the Submittal-related elements.



The Submittal Wizard is one of the Editor's advanced editing tools that automates the insertion of Submittals within the Submittal Article and Section text by using SUB tags to identify the Submittal-related elements. The Submittals contained within the Submittal Article should be double spaced, including the Submittal Items! With that said this has not yet been fully implemented throughout all the guide specifications, but the Submittal Wizard is intelligent enough to insert them correctly, regardless if they are single or double-spaced.



The Submittal Wizard assists you with adding Submittals to a Section and standardizing them across different Sections. In order to do this, the software uses the Unified Master Submittal List (UMSL), which is a list of all the referenced submittals cited in the Unified Facilities Guide Specifications (UFGS) Master. The UMSL is used by the Submittal Wizard and Submittal Checking Features. The Submittal Wizard has the built in intelligence to add Submittals in the correct location therefore, you can place your cursor anywhere within the Submittal Article or you have the option to 'Automatically position tags in the Submittal Article', which we will discuss later.



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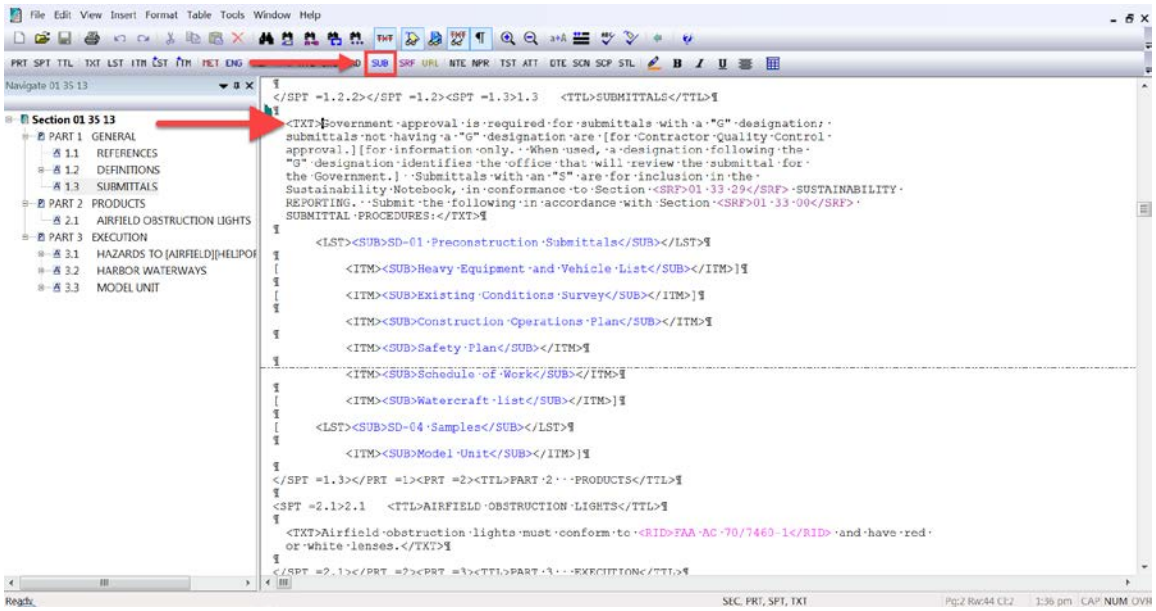
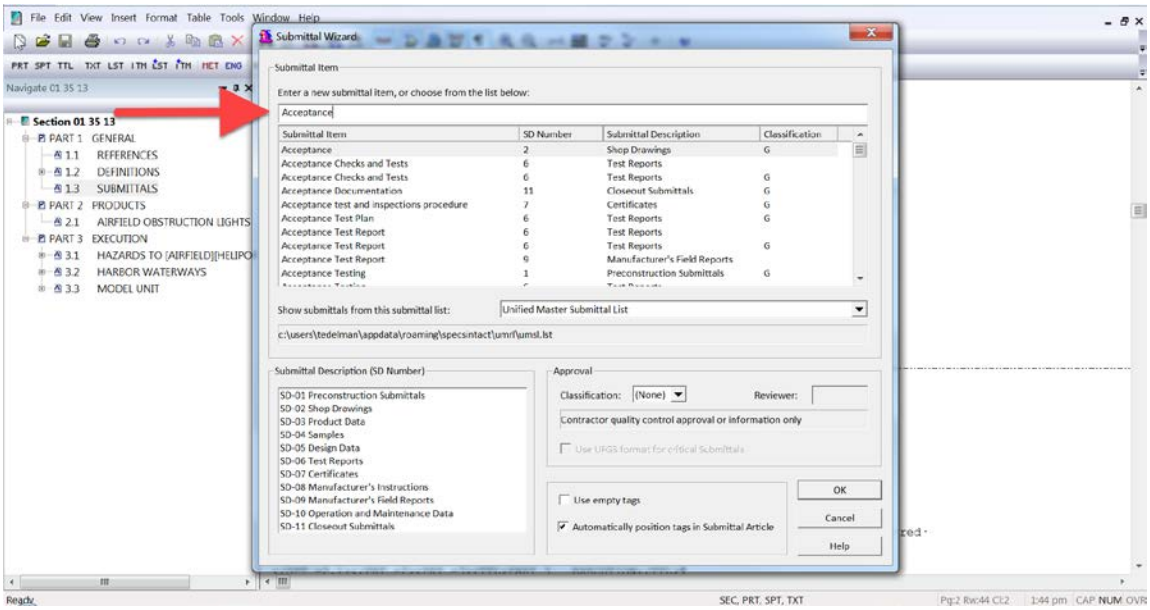
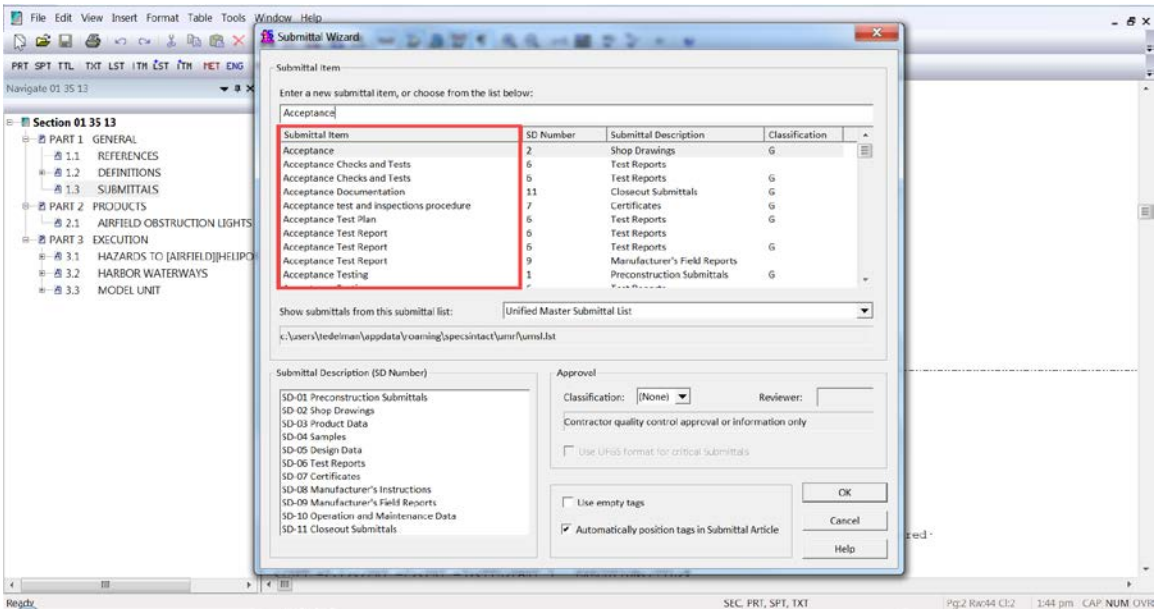
Let's begin! My *cursor* is located at the beginning of the **Submittal Articles** text paragraph. To launch the Submittal Wizard, *select* the **SUB button** on the Editor's Tagsbar.



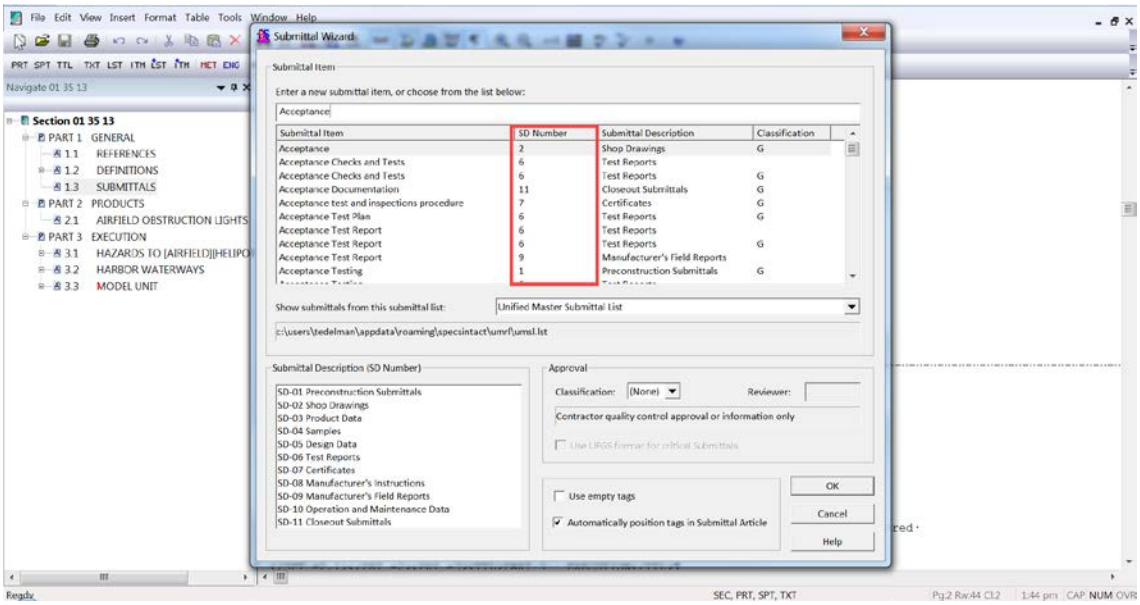
The text field below 'Submittal Items' provides the capability to 'Enter a new Submittal Item, or choose from the list below'. By default, the Submittal Wizard uses and displays the contents of the UMSL. In order to demonstrate, I am going to *enter* '**Acceptance**'. Submittal, the text in the field will begin to autocomplete and the contents of the UMSL will automatically sort based on the information being typed. You can use the Submittal Item as you have entered it, or you can choose one from the UMSL List below. This ensures the submittals are standardized, and remain consistent with the Submittals used throughout the UFGS Master and your Section.



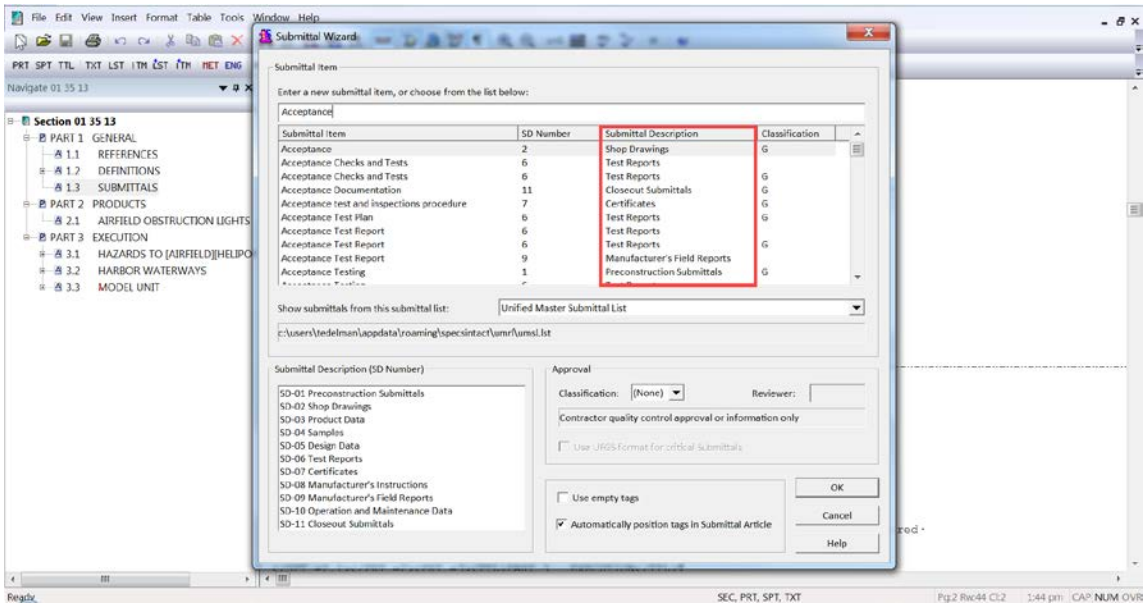
Let's take a moment to discuss the information below the text field. Displayed is the Submittal Item,



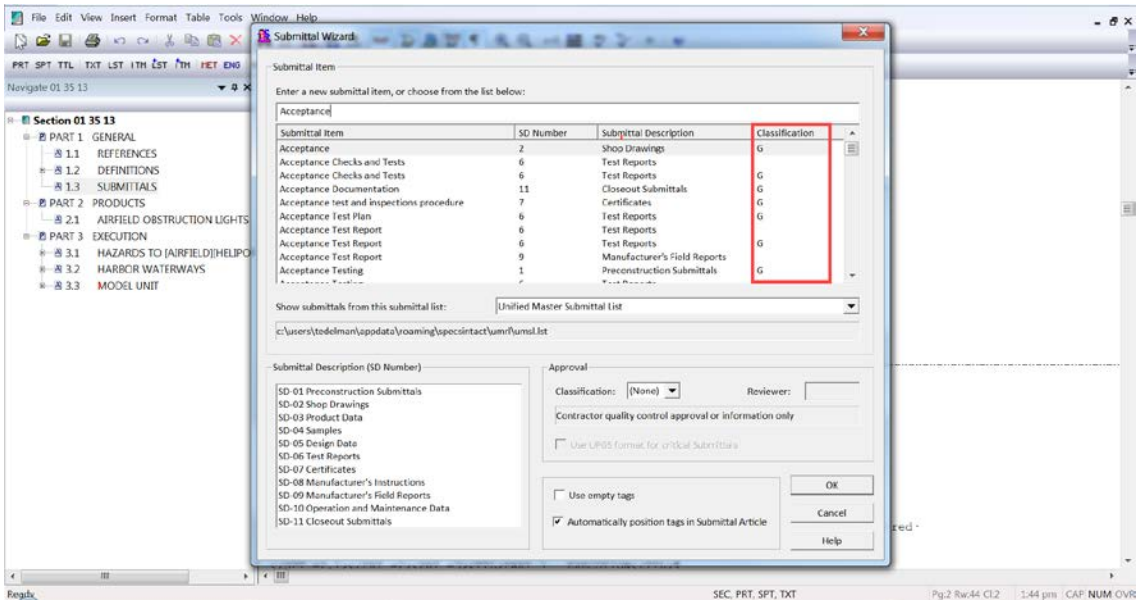
the Submittal Description Number,



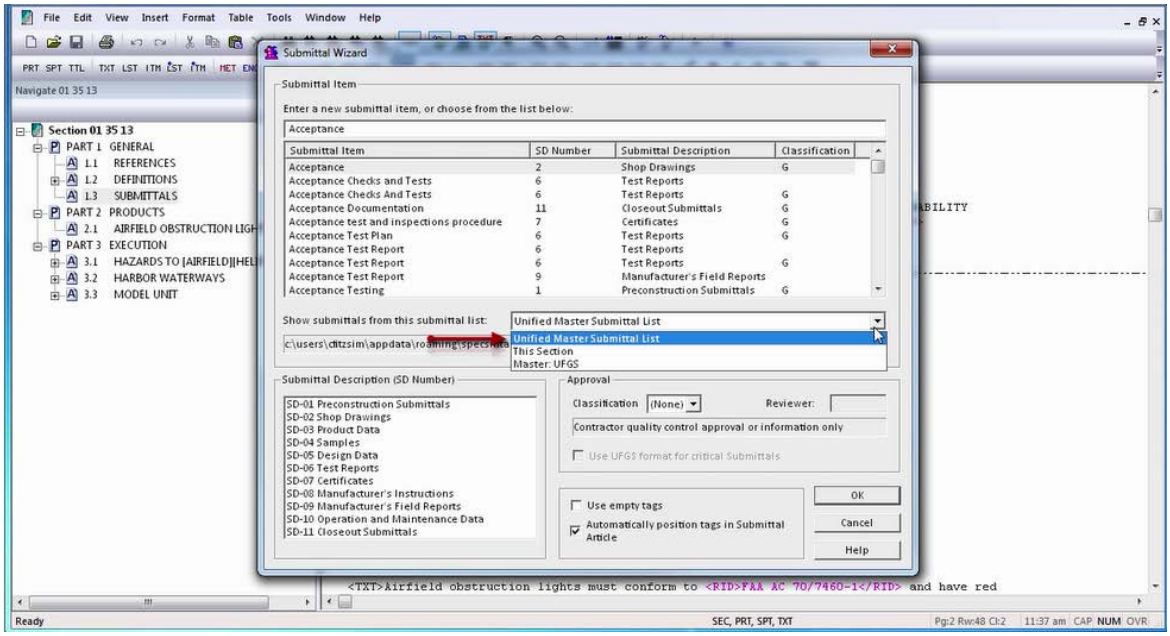
and the Submittal Description as it is located within the UFGS Master, as well as whether the Submittal has a Classification Code.



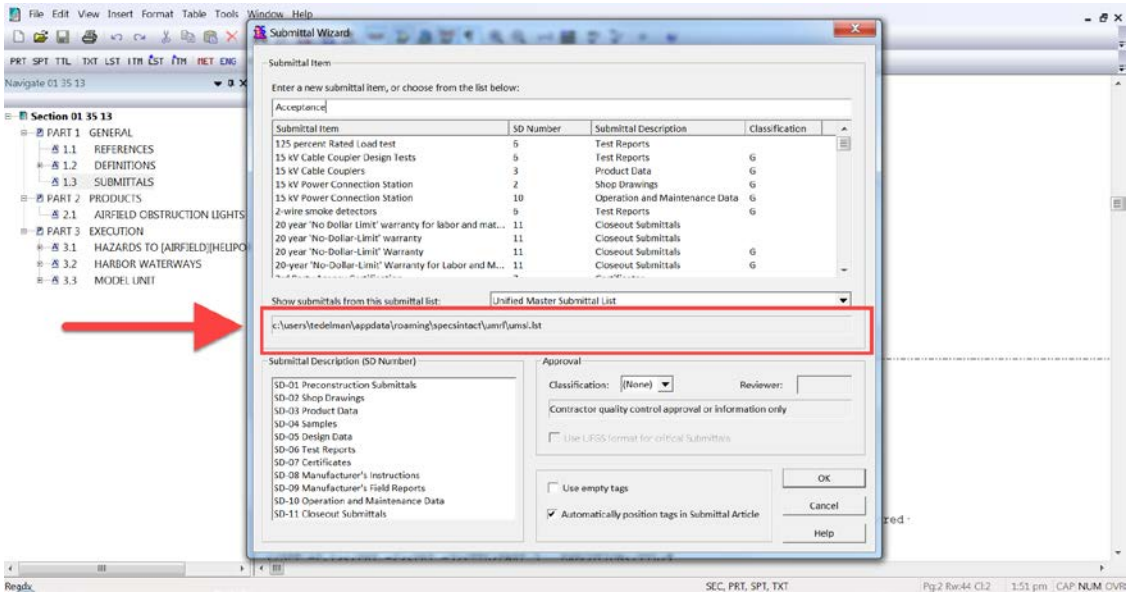
as well as whether the Submittal has a Classification Code.



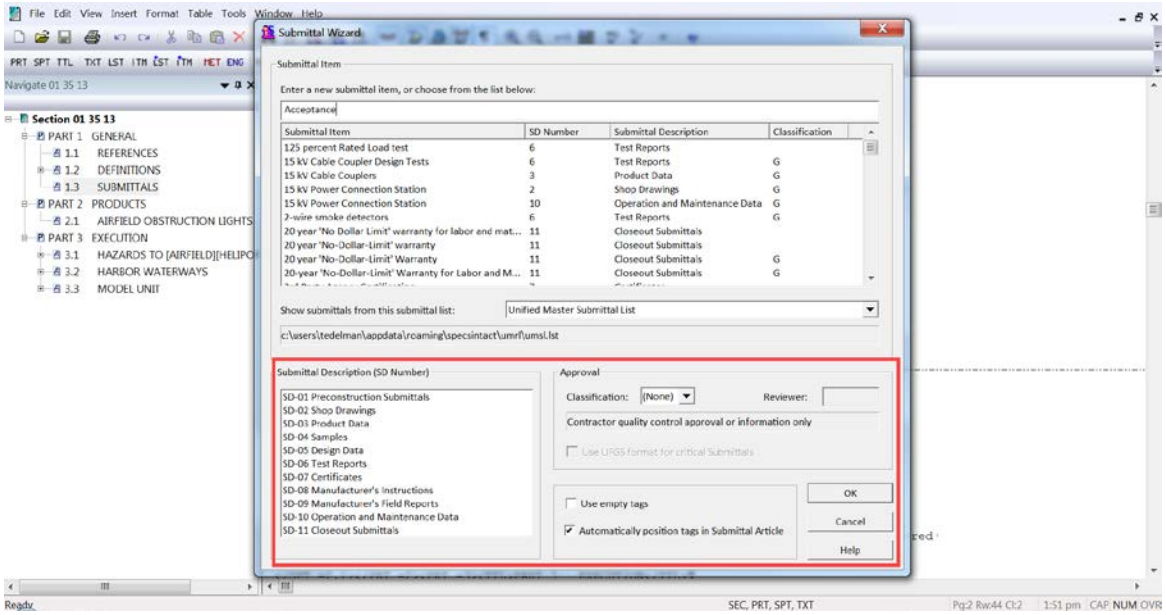
You also have the option to choose a different list by selecting the drop-down arrow. There are three options provided for adding Submittal Items. You can add them from the Unified Master Submittal List (UMSL), the Section being edited, or any other connected Master and the path for the selected list will be displayed below.



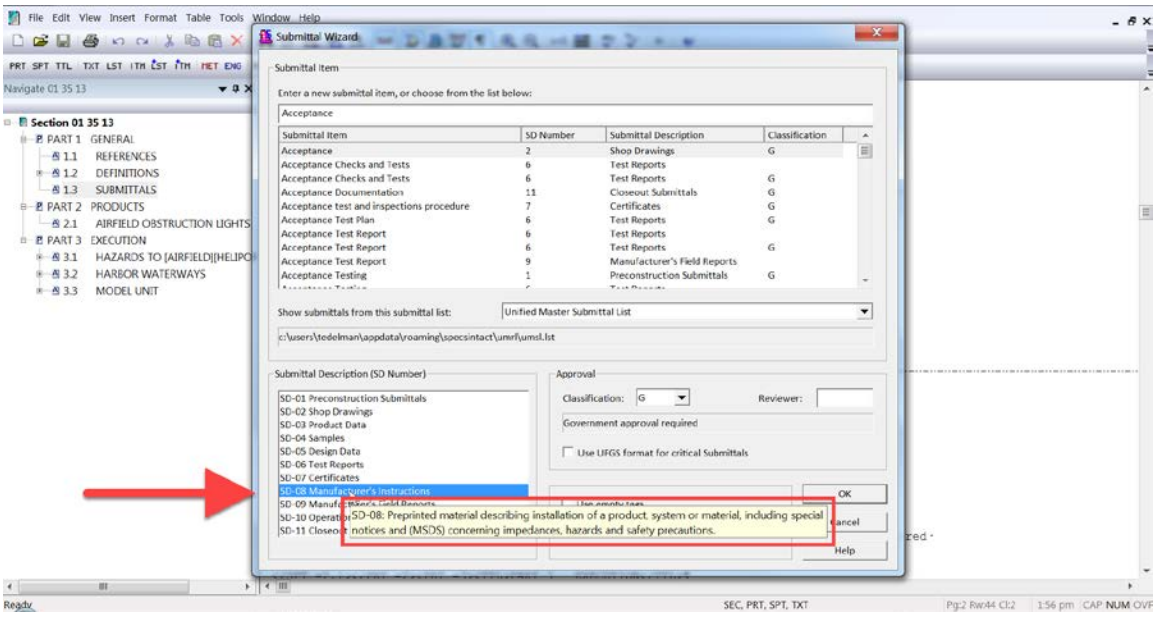
and the path for the selected list will be displayed below.



The bottom Section provides additional options for managing the Submittal Items you are adding



as well as mouse over hints to assist you with your selections.



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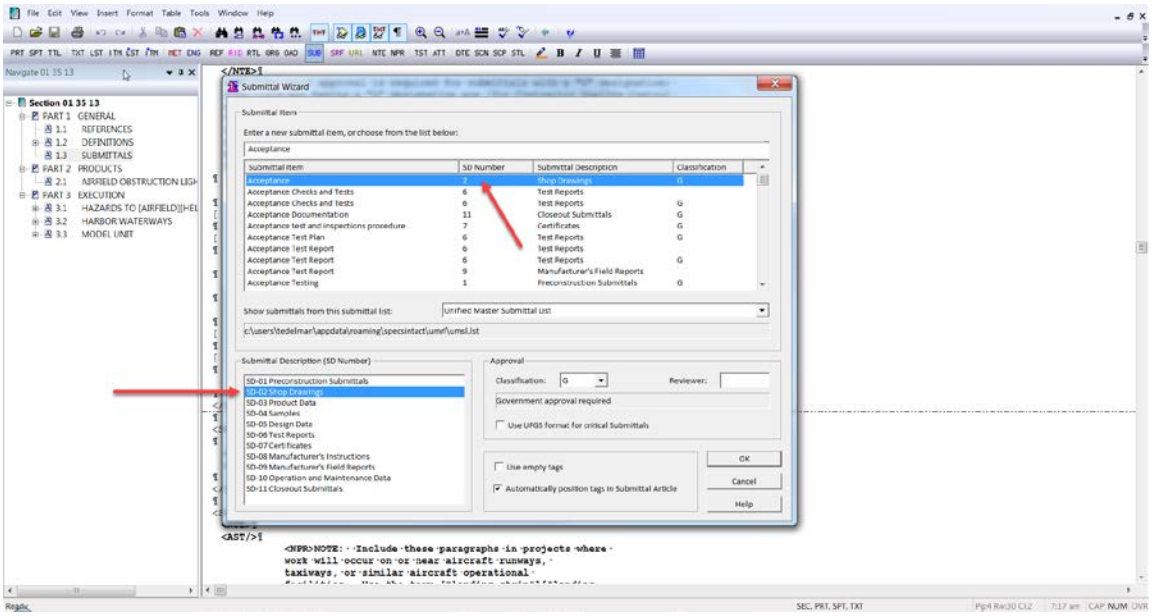
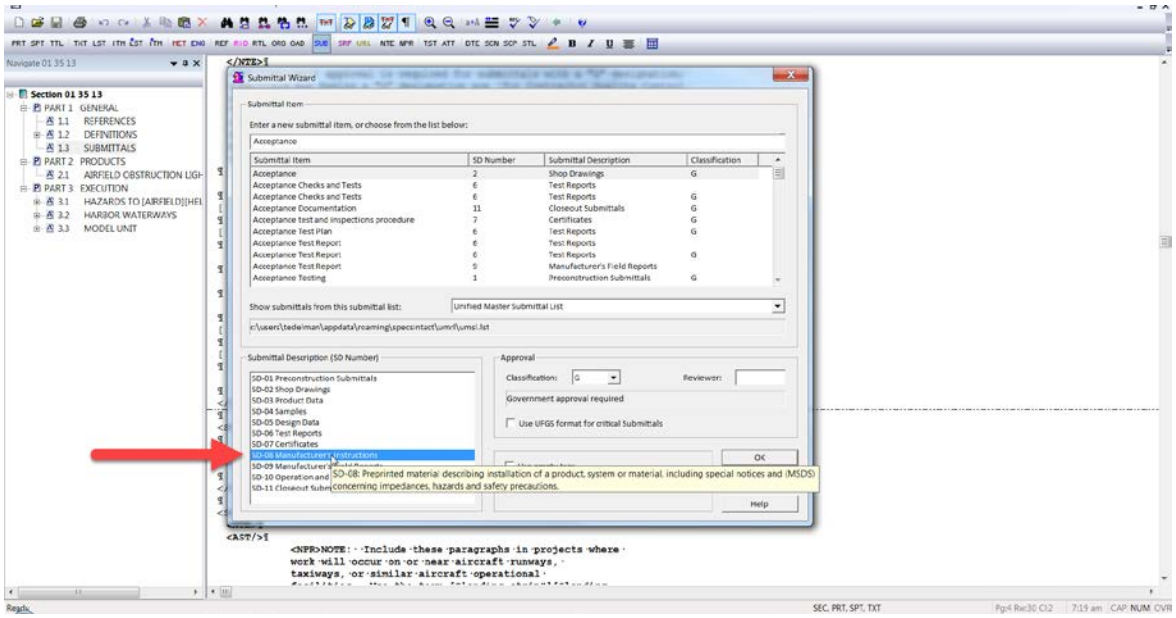
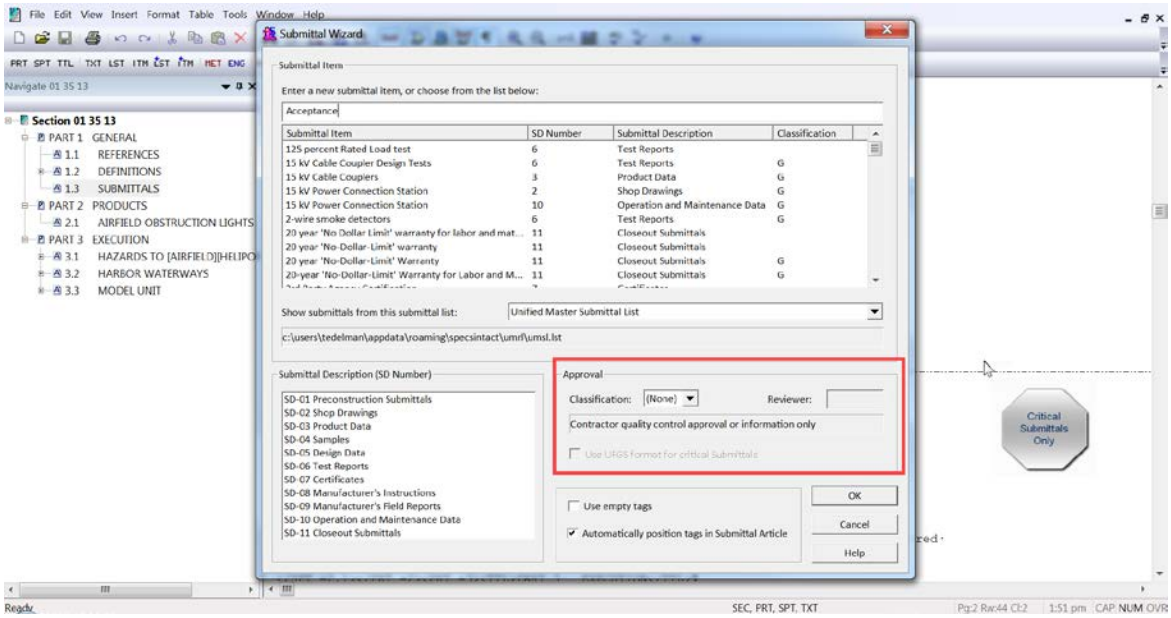
If you look at the list, you will see that 'Acceptance' is listed below SD-02 Shop Drawings and requires Government Approval, but I want to *change* the **Submittal Description** to **SD 08 Manufacturer's** Instructions.



As I selected the new Submittal Description, the Reference Wizard provided a hint containing the Submittal Definition. The Submittal Definitions can also be found in Section 01 33 00 Submittal Procedures.

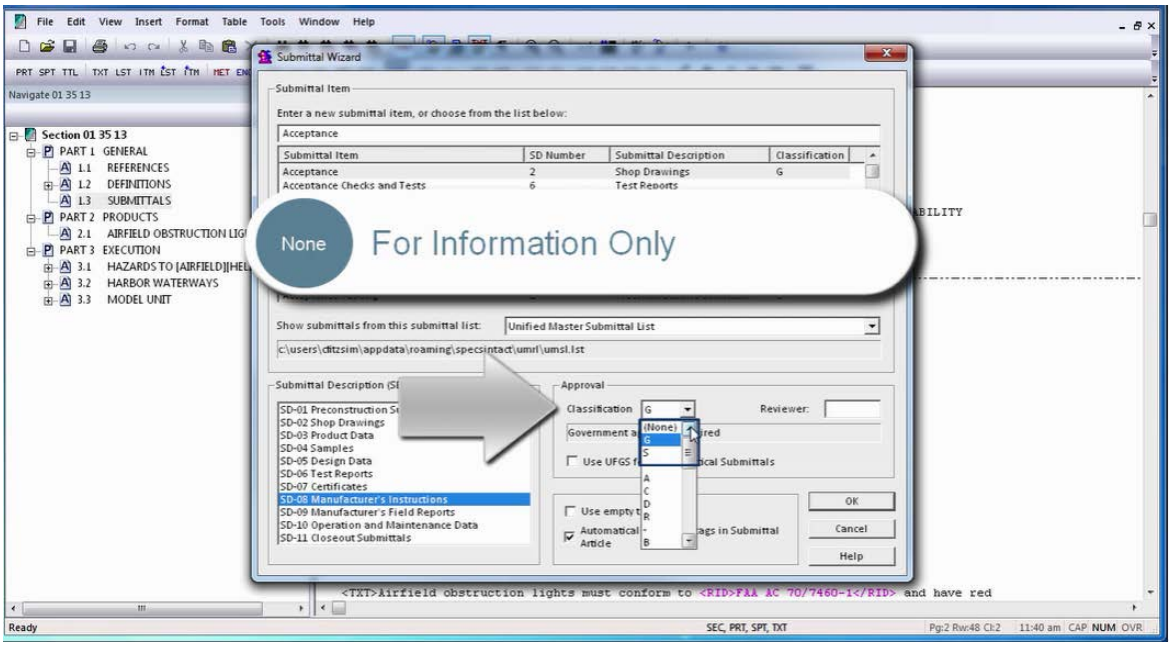


The Approval Section allows you to choose a Classification Code from the drop-down list and enter a Reviewer Code when required. The Submittal Classification and Reviewer Codes, should be used sparingly and for critical submittals only.

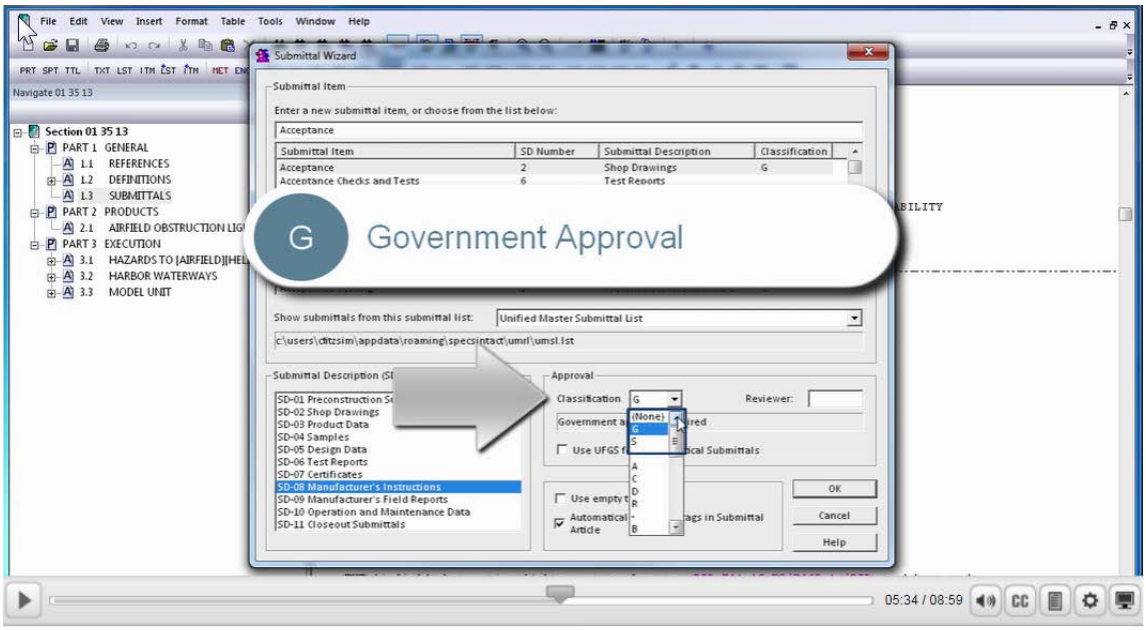


Both of these fields provide mouse-over hints to assist you with your selections. Submittal Classifications indicate when a Submittal is “For Information Only” or when Government approval is required for a Submittal Item. Typically, the Reviewer Code is used only for Army projects and must also accompany a Classification Code. Let us take a closer look at the Classification Codes. For Design-Bid-Build projects you will typically choose either None, G, or S.

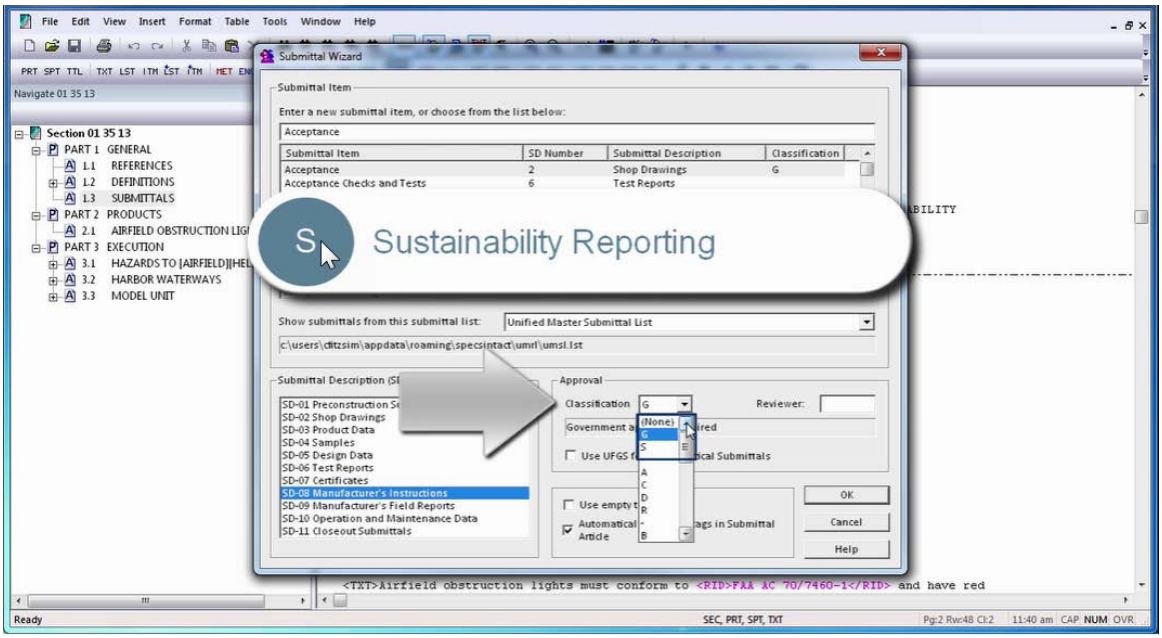
‘None’ indicates the Submittal is “For Information Only”,



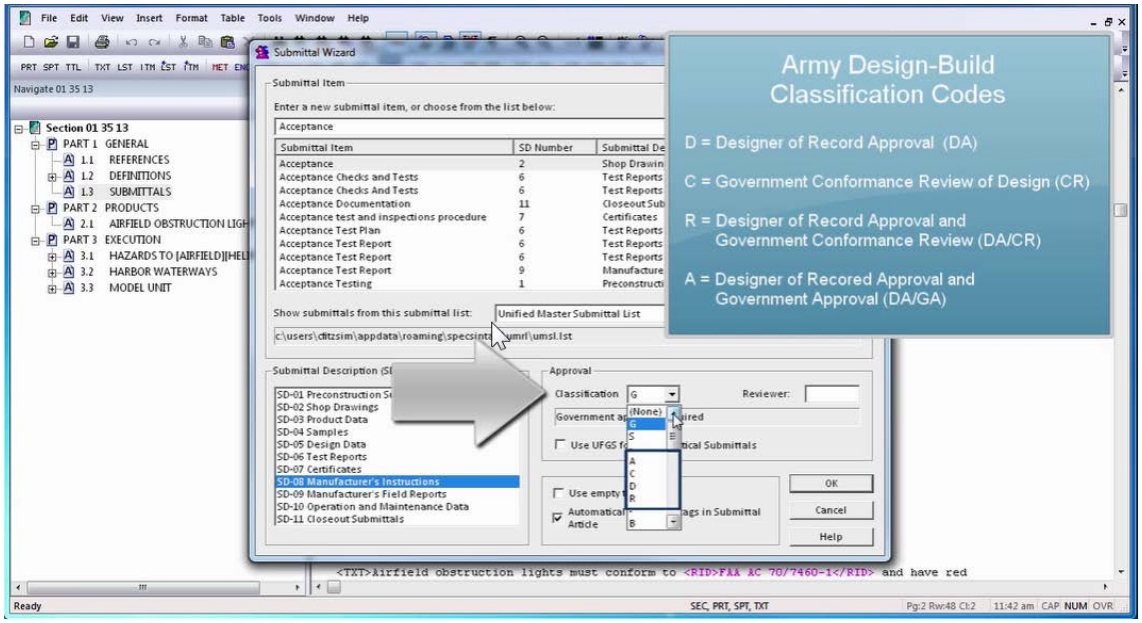
and ‘G’ indicates the Submittal is critical and requires Government Approval.



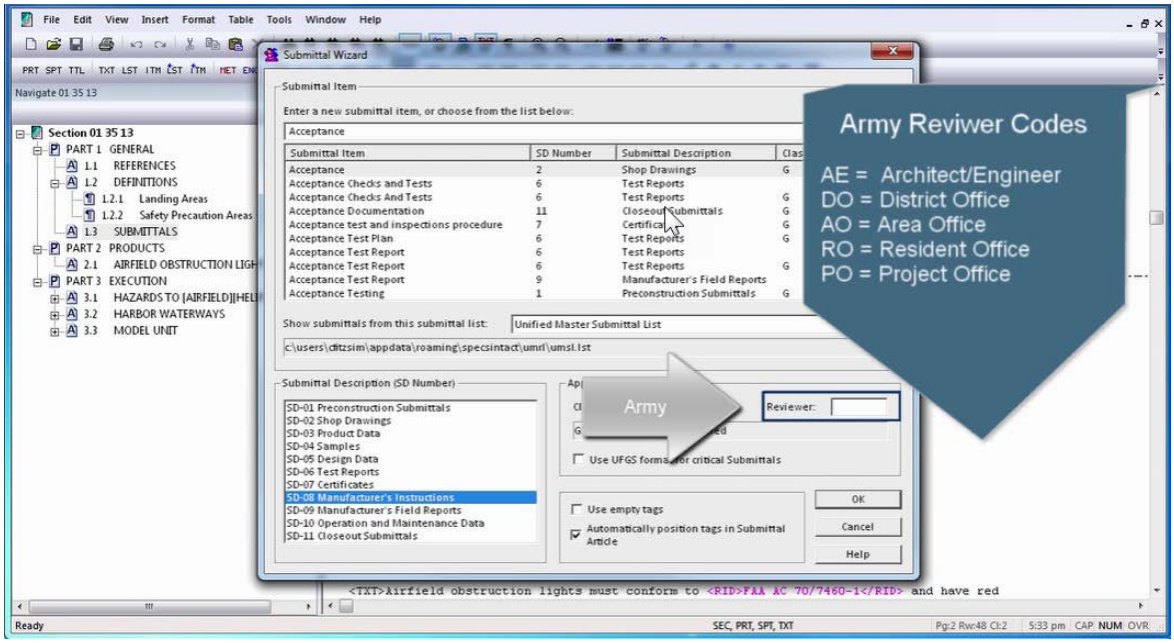
The ‘S’ Classification Code is the new kid on the block designed for Sustainability Reporting. Use the "S" classification only in SD-11 Closeout Submittals. An "S" following a submittal item indicates that the submittal is required for the Sustainability Notebook to fulfill federally mandated sustainable requirements in accordance with Section 01 33 29 SUSTAINABILITY REPORTING.



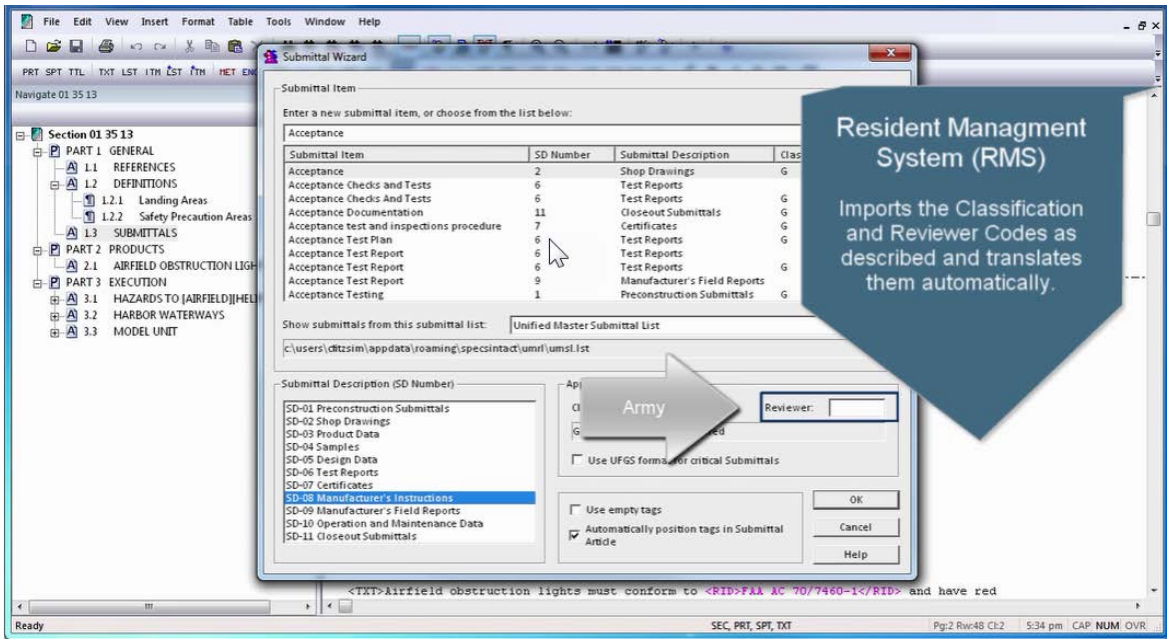
The same Submittal Item may be repeated under another Submittal Description. In addition, Army also uses D, C, R, or A specifically for their Design-Build Projects.



Now let's examine the Reviewer Codes. Navy, Air Force and NASA do not typically use the Reviewer Code. For Army, a Reviewer Code up to three characters can be used to indicate a specific reviewer. In order to add a Reviewer Code, you must first select the appropriate Classification Code. Reviewer Codes for Army projects are: "AE" for Architect-Engineer; "DO" for District Office including the Engineering Division or any other organization within the District Office; "AO" for the Area Office; "RO" for the Resident Office; and "PO" for the Project Office.



Army's Resident Management System (RMS) will import the Classification and Reviewer Codes as described and translate them automatically.



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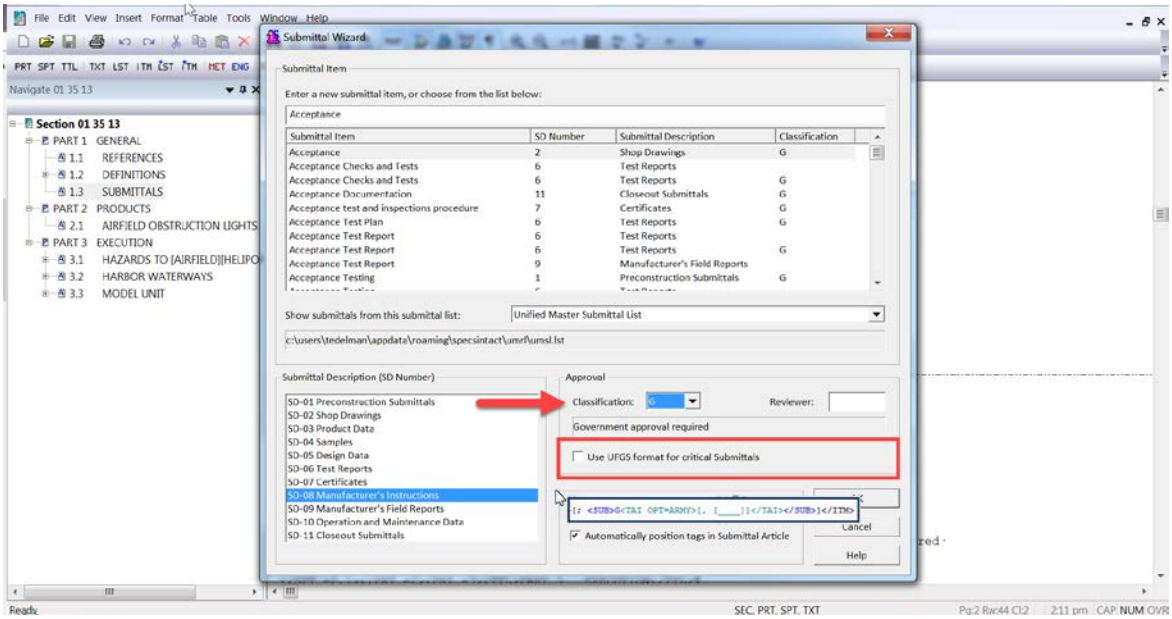
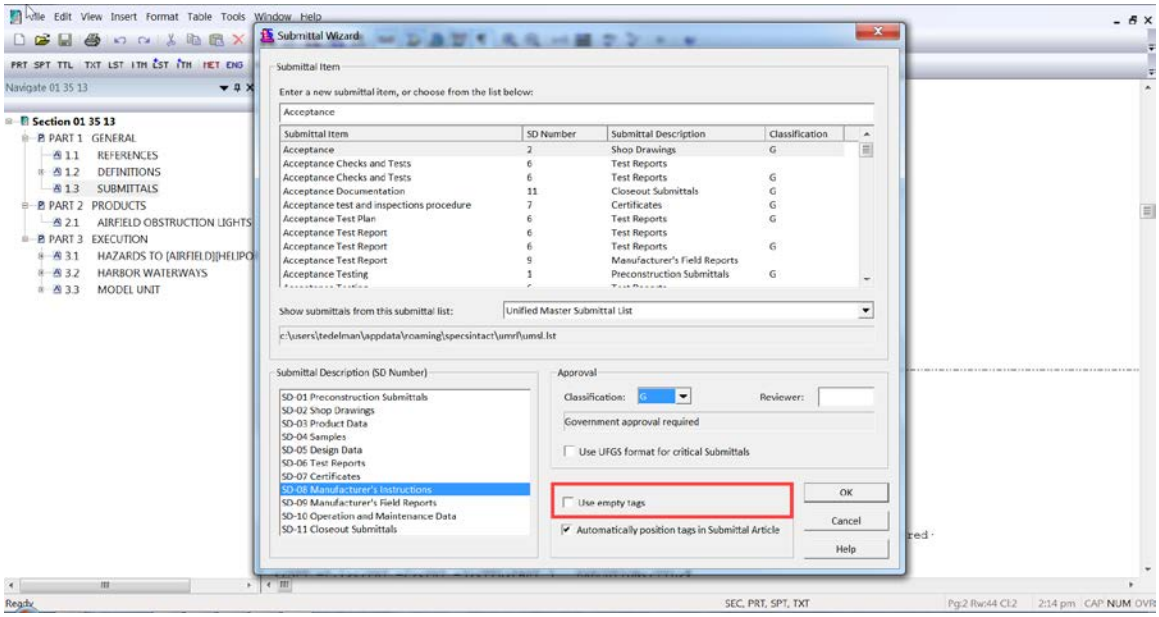
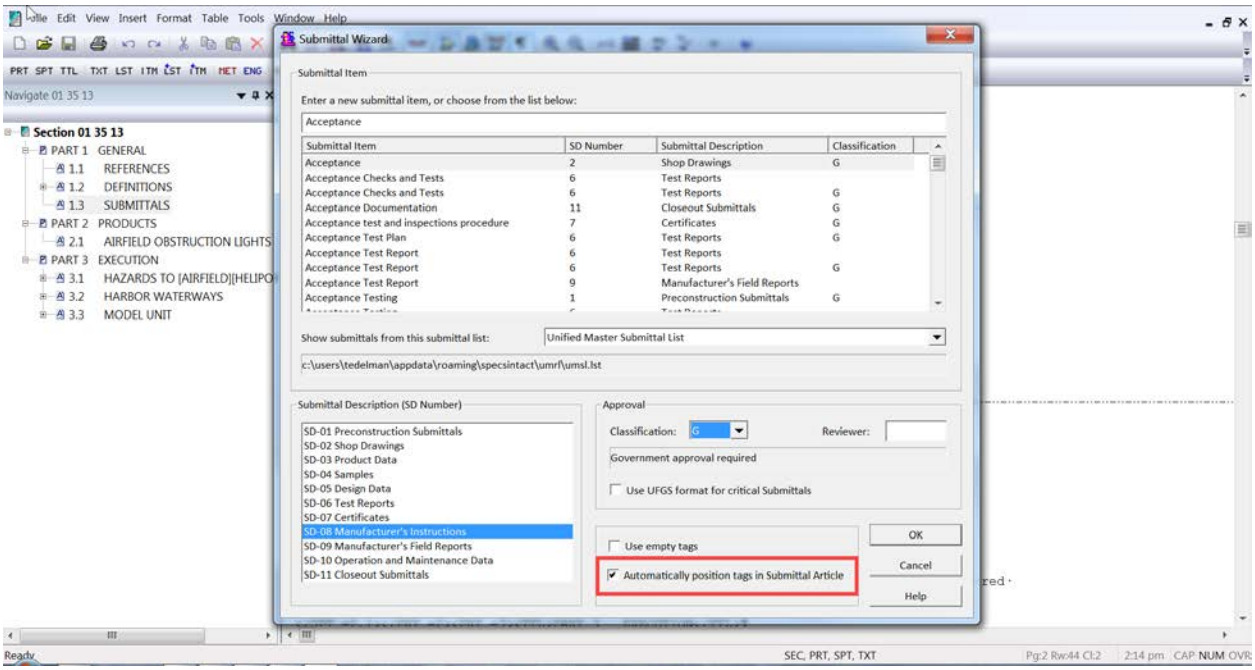
Now that you have a better understanding for the Classification and Reviewer codes, let's talk about the remaining features of the Submittal Wizard. The option 'Use UFGS format for critical Submittals' option is only used when creating a UFGS Master Section or a Local Master Section. In order to use this option, you must first *select* the **Classification Code 'G'**. When this option is selected, the default Submittal format for critical Submittals will be inserted.



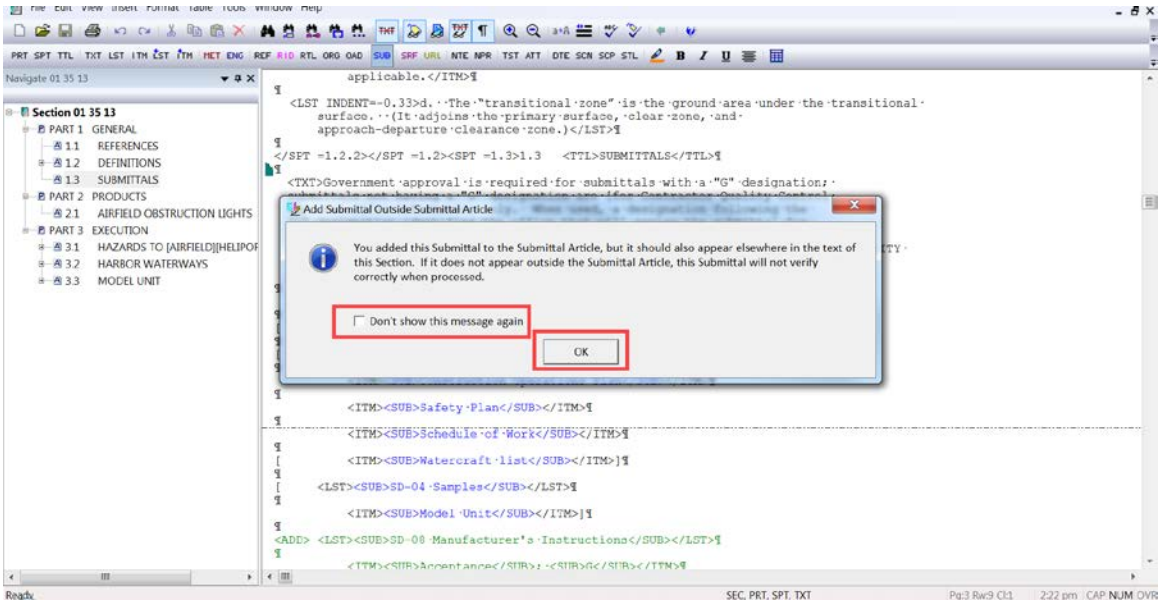
The option to 'Use empty tags', does just as it describes by inserting a set of empty Submittal Tags at the cursor position.



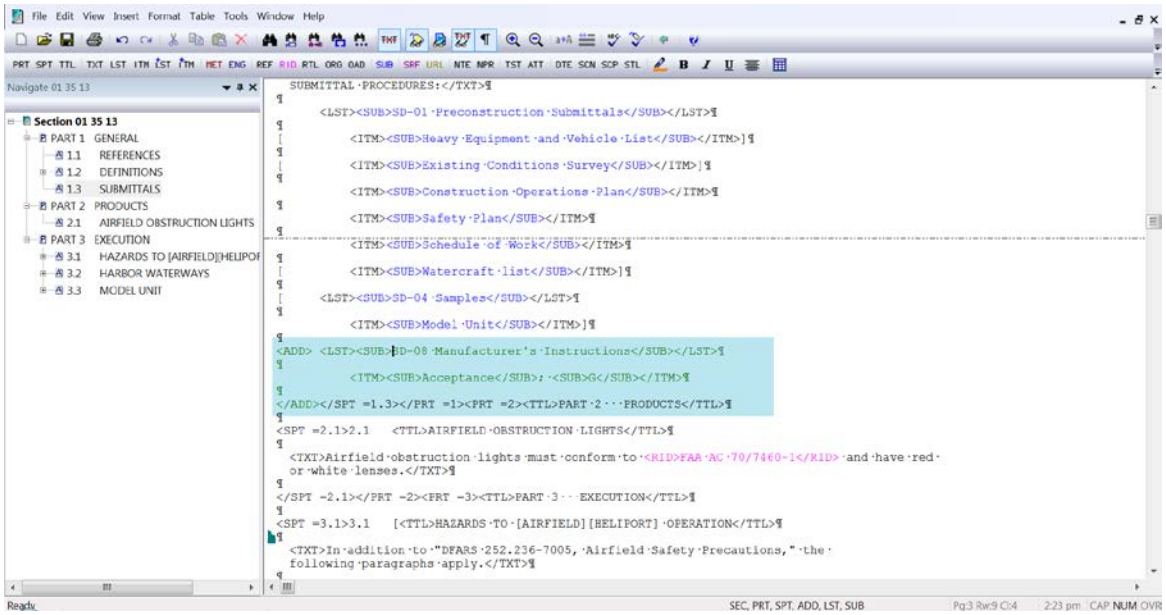
The option to 'Automatically position tags in Submittal Article' provides precise control over the placement of the submittals, so if you wish to control the placement, you would unselect this option. Now that we have made our selections, let's *select* **OK**.



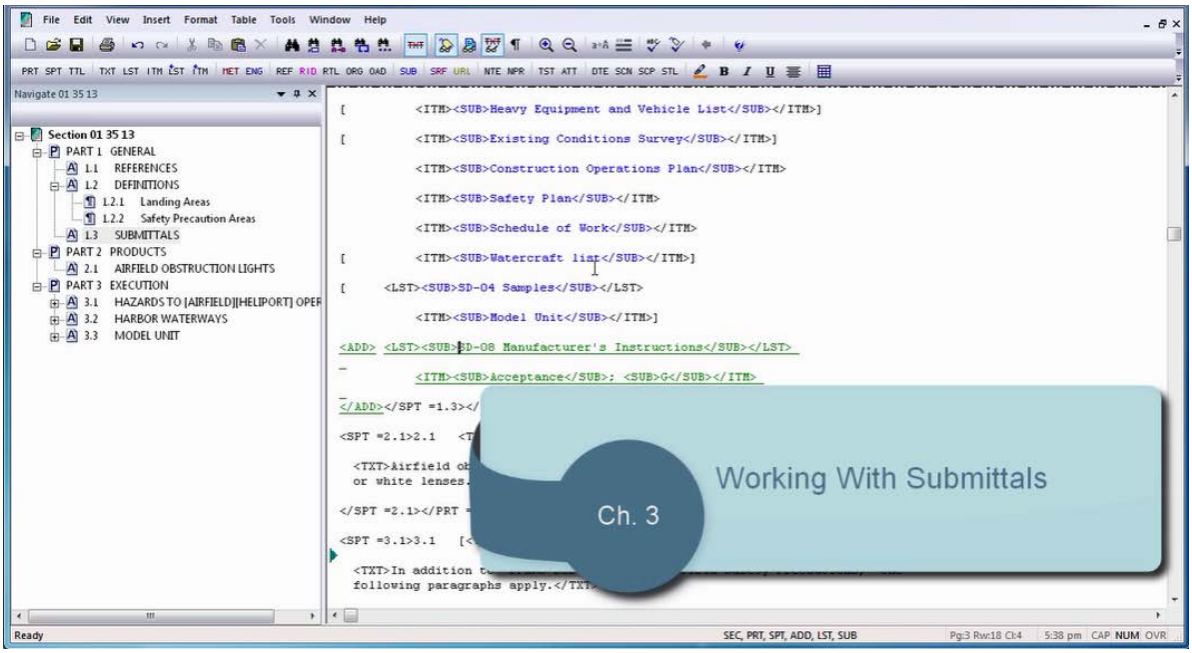
When adding Submittals to the Submittal Article, the Editor will display a message box to inform you that you have added a Submittal to the Submittal Article but it should also appear elsewhere in the text of this Section. You can *select* '**Don't show this message again**' once you are comfortable with the Submittal requirements. Now let's *select* the **OK button**.



As you see, the new Submittal was added to the Submittal Article in the correct order.



This concludes our lesson on the Submittal Wizard but I want to mention once again that you should also review the "Working With Submittals" module. To learn more proceed to the next module of your choice.



Contact Information

If you need further assistance, please contact our Technical Support Desk. We will be happy to answer any questions you may have.

SpecsIntact Technical Support
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eLearning Module Notes: