

Submittals

Instructor Setup

1. Create the projects needed for the scenarios,
2. Assign student(s) to project(s).
3. Upload specifications to each project, review and publish.
4. Upload any supplemental submittal files to Documents folder (product data, shop drawings, etc.)
5. Encourage students to complete the survey once they have completed the required scenarios. (*QR code to survey included on last page*)

Things to Consider

- All scenarios are web based- to be completed on a desktop/laptop.
- Specifications must be published before all scenarios
- Scenario 1 & 2 assume students are working in a group/partner pair.
- As an alternative to group work, students can build a submittal workflow and enter the instructor as the assignee in the first step. (Standard Permissions)
- Students with Standard permissions/granular access can *only* create and see *their own* submittals if you have the configuration “Private by Default” enabled.
- Scenario 3 requires students to add information to an excel spreadsheet to build the submittal register.
- Times listed are estimates and can vary depending on student groups.

Recommended Student Permissions:

Submittals: Admin

Specifications: Read only or Higher

Documents: Read only or Higher

Roles Involved:

General Contractor - Project Manager

Specialty Contractor - Project Manager

Design Team - Architect

Scenario 1 | Collaboration Station (~5 min)

The project engineer at the general contracting company has been asked to create a submittal in Procore. The goal is to loop in each role so that all communication about the submittal between the GC, the tradesperson and the architect is streamlined.

Hint! Once the project engineer creates the submittal, the tradesperson can find the submittal information in the Documents tool.

Once the project engineer receives the information back from the tradesperson, it should be sent off to the design team.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Scenario 2 | No Room for Errors (~5 min)

The design team has just received the submittal complete with the submission from the trade and PE approval. After reviewing the submittal information, the architect determines that there are revisions needed before they can approve.

The architect should send the submittal back to the general contractor's project engineer.

The project engineer should determine the best way to initiate a revision.

Run the revision through the workflow. Congratulations! It's approved! What should happen next?

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Scenario 3 | Register Realities (~10 min)

The contracting company that you work for has just assigned you to a new job. As the project engineer, you are tasked with building out the submittal register.

Choose 2 specification sections. Build out one section's submittal register onto an excel file manually. Build out the other section's submittal register through the Specifications tool's shortcut.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Scenario 4 | Ch-Ch-Ch-Changes (~10 min)

In a small group, discuss the benefits of bulk actions. When might you need to edit the Submittal Manager? The submittal status? In what circumstances might you want to apply a workflow in bulk?

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Let the Procore.org team know what you thought of this activity. Use a smartphone or tablet to scan the QR Code below. Complete the survey and be entered to win Procore swag!

