Submittals: Updates to Submittal Workflow

This announcement represents a single point in time. Future releases may impact the information below.

Feature Announced: November 14, 2019 / Feature Released: February 11, 2020

Click here to read the PreRelease Information

This documentation details prerelease software. Its accuracy and reliability is not guaranteed by Procore Technologies, Inc. and it is subject to change without notice. It is being provided online for preliminary evaluation prior to an upcoming release. Procore is not responsible for and expressly disclaims all warranties of any kind with respect to this documentation and will not be responsible for any harm, loss, costs, or damages incurred due to its use.

Updates to Submittal Workflow

Procore has released updates to the Submittal Workflow in the project’s Submittals tool.

Previews

Respond to a Submittal as a Submitter or Approver

If you have been designated as a 'Submitter' or 'Approver' on a submittal, a yellow banner will display when your action is required and you are viewing the submittal. An asterisk next to your name in the 'Submittal Workflow' table indicates whether or not your response is required.

Under the ‘Review’ column, you’ll see a link to open the attachment in Procore’s document viewer and an icon to


Updated: Tue, 18 Feb 2020 07:54:34 GMT
Powered by
download the attachment to your computer. If there are multiple attachments, you can click the vertical ellipsis (⋮) at the end of the row to download all attachments.

**Tip**
If attachments were not added as a part of a previous step in the Submittal Workflow table, check the 'Attachments' field under the submittal's General Information.

Clicking **Respond** on the row with your name will open a new window where you can select your response, add comments, and add attachments.

On the next screen in the same window, you can preview your response.

**Respond to a Submittal on Behalf of a Submitter or Approver**

Users with 'Admin' level permissions on the project's Submittals tool will see a blue banner when action is required from another user. They will be able to edit a Submitter's or Approver's response, including the 'Sent Date' and 'Returned
Date', by clicking the vertical ellipsis (⋮) at the end of the row with the user's name.

Users with 'Admin' level permissions will also be able to set a previous step in the workflow as Ball In Court by clicking the vertical ellipsis (⋮) at the end of the numbered row above the Submitter's or Approver's name.

See Also

- Create a Submittal
- Upload and Submit a Submittal
- Respond to a Submittal as an Approver
- Edit a Submittal Response

If you would like to ask questions or share any feedback, please contact support@procore.com.