

Kahua Quick Reference Guide

Submittals

About Submittals










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The **Packaged Submittals** application allows the project team to collaborate on Packaged Submittals. **Submittal Items** and **Submittal Packages** may be created by the Submitting Vendor and distributed to the Official Reviewer and optional Consultant Reviewers. The responses are filtered back through the Official Reviewer who shares the comments with the Submittal Coordinator who then returns the reviewed submittals to the Submitting Vendor.

This action is typically created by this role: **EXT-Contractor**

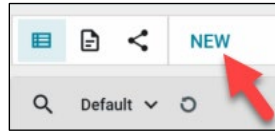
Navigating to Packaged Submittals

1. Open the project using Project Finder on the left navigation pane.
2. Select **Packaged Submittals** in the Document Management section of the **App Launcher**.

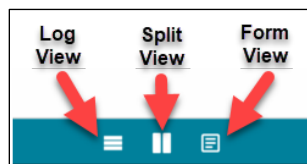
- Document Management**
-  Communications
 -  Daily Reports
 -  Field Observations
 -  Packaged Submittals
 -  Punch Lists 
 -  RFIs
 -  Risk Register
 -  Safety

Creating a Submittal Item Record

1. Click on the **Submittal Items** sub-app.
2. Click **NEW** to create a new Submittal Item.

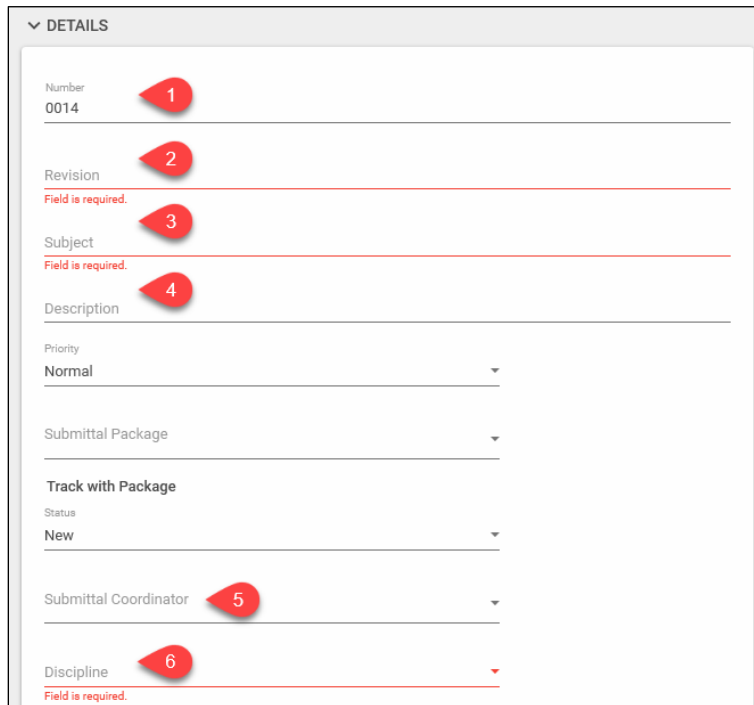


Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.



Details Section

3. The **Number** will auto-populate but can be changed if necessary.
4. The **Revision** field is required and must be populated.
5. The **Subject** field is required and must be populated.
6. Enter a **Description** for the Submittal Item.
7. Select the appropriate contact from the **Submittal Coordinator** drop-down list.
8. The **Discipline** field is required and must be populated.
9. Update all other fields desired in the **Details Section** with the appropriate information, including references which are covered later in this QRG.



The screenshot shows a 'DETAILS' form with the following fields and callouts:

- Number:** 0014 (Callout 1)
- Revision:** Field is required. (Callout 2)
- Subject:** Field is required. (Callout 3)
- Description:** (Callout 4)
- Priority:** Normal (dropdown arrow)
- Submittal Package:** (dropdown arrow)
- Track with Package:** (checkbox)
- Status:** New (dropdown arrow)
- Submittal Coordinator:** (dropdown arrow) (Callout 5)
- Discipline:** Field is required. (dropdown arrow) (Callout 6)

10. Click the **Save** button to save the submittal item.

Note: To add the submittal to a Submittal Package, follow the steps outlined below in the “Creating a Submittal Package” topic.

Reviewers Section

Note: The Reviewers Section is typically updated by the **Submittal Coordinator** when the Submittal Item is assigned to them.

- 11. Select the appropriate contact from the **Official Reviewers** drop-down list.
- 12. Enter details in the **Instructions to Official Reviewer** field.

REVIEWERS

Official Reviewer

Instructions To Official Reviewer

Response

Response Notes

Consultant Reviewers Section

Note: The Consultant Reviewers Section is typically updated by the **Official Reviewer** when the Submittal Item is assigned to them.

13. Enter details in the **Instructions** field.
14. If the review needs to be completed sequentially then check the box for **Sequential Review**.
15. To add reviewers, enter the number of reviewers needed and then click on the **Insert** field.
16. Select the appropriate contact from the **Reviewer** dropdown list.
17. Enter the **Review Period**. This is a required field and must be populated before the record can be saved. This is the number of days needed for the item review.
18. Select a date from the calendar picker for the **Sent Date** field.
19. Select a date from the calendar picker for the **Response Due Date** field.
20. Leave the Response date blank. This field is populated automatically when the response is received from the reviewer.

Submittal Dates Section

21. Complete all date details needed related to the **Submittal Item**.

Comments Section

22. Add any comments to the **New Comments** field in the Comments section

References Section

23. Attach any supporting documentation such as photos or pdf files by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments** if needed and clicking **OK**.

Action Buttons

24. Click the **Save** button to complete the creation of the Submittal Item Record

25. If the submittal item will not be added to a package and requires review, click the **Assign to Coordinator** button located on the bottom tool bar. This will notify the **Submittal Coordinator** selected earlier to start the review process. The **Submittal Coordinator** will complete the **Reviewers Section** using the steps outlined above.

Creating a Submittal Package Record

1. From the Packaged Submittals App, click on the **Submittal Packages** sub-app.
2. Click **NEW** to create a new Submittal Package.

Details Section

3. The **Number** will auto-populate but can be changed if necessary.
4. The **Revision** field is required and must be populated.
5. The **Subject** field is required and must be populated.
6. Enter a **Description** for the Submittal Package/
7. Select the option to **Track Items with Package** if you would like to synchronize Submittal Items with the Submittal Package.
8. Leave the **Status** set to New.
9. Select the appropriate contact from the **Submittal Coordinator** dropdown list.
10. The appropriate **CSI Code** from the dropdown list if needed.
11. Add any contacts to the Response Distribution that should receive notification when a response is added to the Submittal Package.
12. Enter any related Notes needed for the Submittal Package.

▼ DETAILS

Number 1
0009

Revision 2
Field is required.

Subject 3
Field is required.

Description 4

Track Items with Package 5

Status 6
New ▼

Submittal Coordinator 7 ▼

CSI Code 8 ▼

Response Distribution 9 ▼

Notes 10

Reviewers Section

Note: The Reviewers Section is typically updated by the **Submittal Coordinator** when the Submittal Package is assigned to them. These steps are repeated below in the [Submittal Coordinator Begins Review](#) section.

13. Select the appropriate contact from the **Official Reviewers** dropdown list.
14. Enter details in the **Instructions to Official Reviewer** field

Consultant Reviewers Section

Note: The Consultant Reviewers Section is typically updated by the **Official Reviewer** when the Submittal Package is assigned to them. These steps are repeated below in the [Submittal Coordinator Begins Review](#) section.

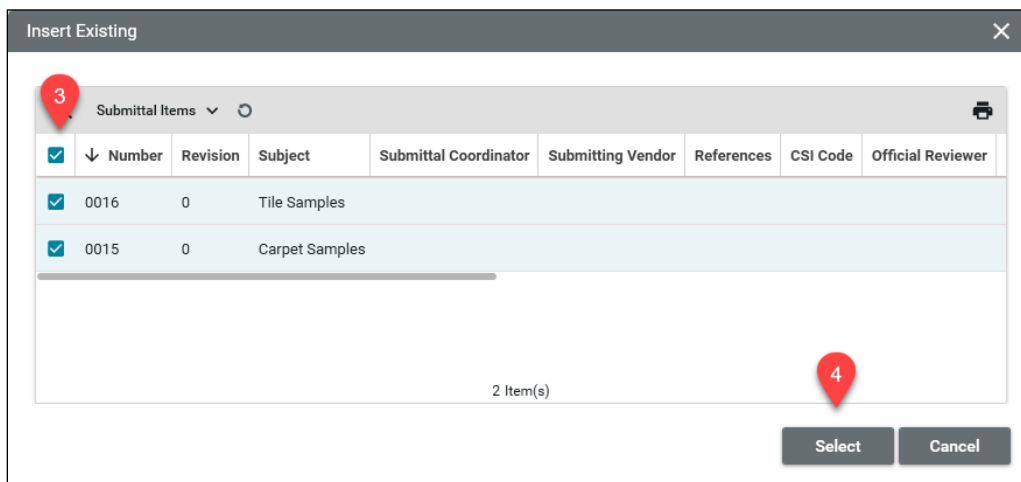
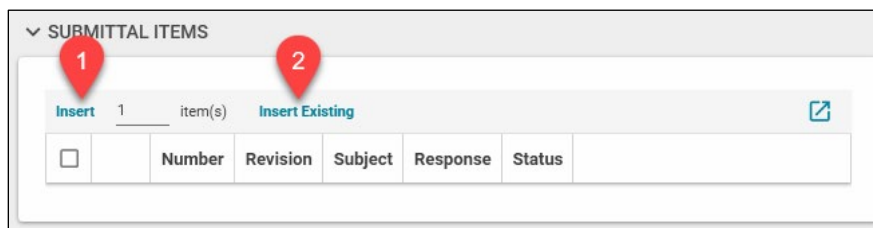
15. Enter details in the **Instructions** field.
16. If the review needs to be completed sequentially then check the box for **Sequential Review**.
17. To add reviewers, enter the number of reviewers needed and then click on the **Insert** field.
18. Select the appropriate contact from the **Reviewer** dropdown list.
19. Select a date from the calendar picker for the **Response Due Date** field.

Submittal Dates Section

20. Complete all date details needed related to the **Submittal Package**.

Submittal Items Section

21. If new Submittal Items need to be created to add to the submittal package the enter the appropriate number of Items rows needed and click on the **Insert** button and complete the details of each Submittal Item as instructed in the steps above for creating Submittal Items.
22. If adding Submittal Items that have already been created, click on the **Insert Existing** button.
23. Select all items that should be added to the package from the list of Submittal Items by placing a check in each row.
24. Click on the **Select** button.



Comments Section

25. Add any comments to the **New Comment** field in the Comments section.

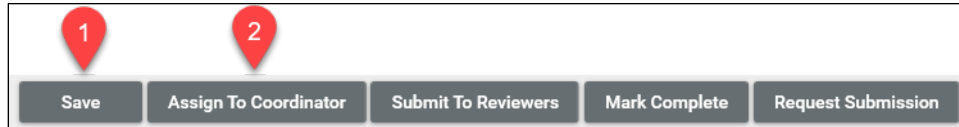
References Section

26. Attach any supporting documentation such as photos or pdf files by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments** if needed and clicking **OK**.

Action Buttons

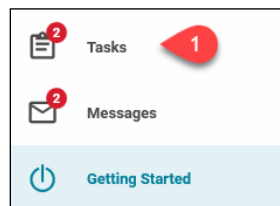
27. Click the **Save** button to complete the creation of the **Submittal Package** Record

28. Click the **Assign to Coordinator** button located on the bottom tool bar. This will notify the **Submittal Coordinator** selected earlier to start the review process. The **Submittal Coordinator** will complete the **Reviewers Section** using the steps outlined above.



Submittal Coordinator Begins Review

1. Logged in as the Submittal Coordinator, click on the Tasks App located in the left navigation pane.
2. Click the Submittal Package task to open the record.



View: Default				
FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP
GC UAT 1b	Please Review Submittal Package 0009 - (Interior Design Samples)	11/21/2021		Submittal Packages

3. Review the package from the Submitting Vendor.
4. Select the appropriate contact from the **Official Reviewers** dropdown list.
5. Enter details in the **Instructions to Official Reviewer** field.
6. Update any other fields with additional information needed.

▼ REVIEWERS

Official Reviewer

Instructions To Official Reviewer

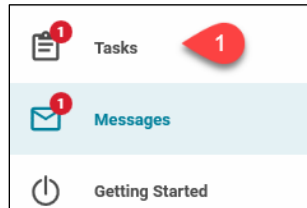
Action Buttons

7. Click the **Save** button to complete the update of the **Submittal Package** Record.
8. Click the **Submit to Reviewers** button. This will send a Task to the **Official Reviewer** selected earlier to continue the review process. Alternately the Submittal Coordinator and Mark the Submittal Package as complete to end the review or Request Submission by using the appropriate buttons.



Official Reviewer Adds Consultants and Continues Review

1. Logged in as the Official Reviewer, click on the Tasks App located in the left navigation pane.
2. Click the Submittal Package task to open the record.



FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP
GSA PM UAT 1b	Review Requested for Submittal Package 0009 - (Interior Design Samples)	11/22/2021	2/5/2021	Submittal Packages

Consultant Reviewers Section

3. Enter details in the **Instructions** field.
4. To add reviewers, enter the number of reviewers needed and then click on the **Insert** field.
5. Select the appropriate contact from the **Reviewer** dropdown list.
6. Select a date from the calendar picker for the **Response Due Date** field.

Note: The **Sent Date** and **Response Date** are automatically populated.

▼ CONSULTANT REVIEWERS

Instructions 1

Insert 1 item(s) 2

<input type="checkbox"/>	Reviewer	Sent Date	Response Due Date	Response Date
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3 4

Submittal Items Section

The Official Reviewer can submit the Submittal Package to consultant reviewers after identifying who should be included in the list of reviewers and they can also respond to the Submittal Items with their assessment.

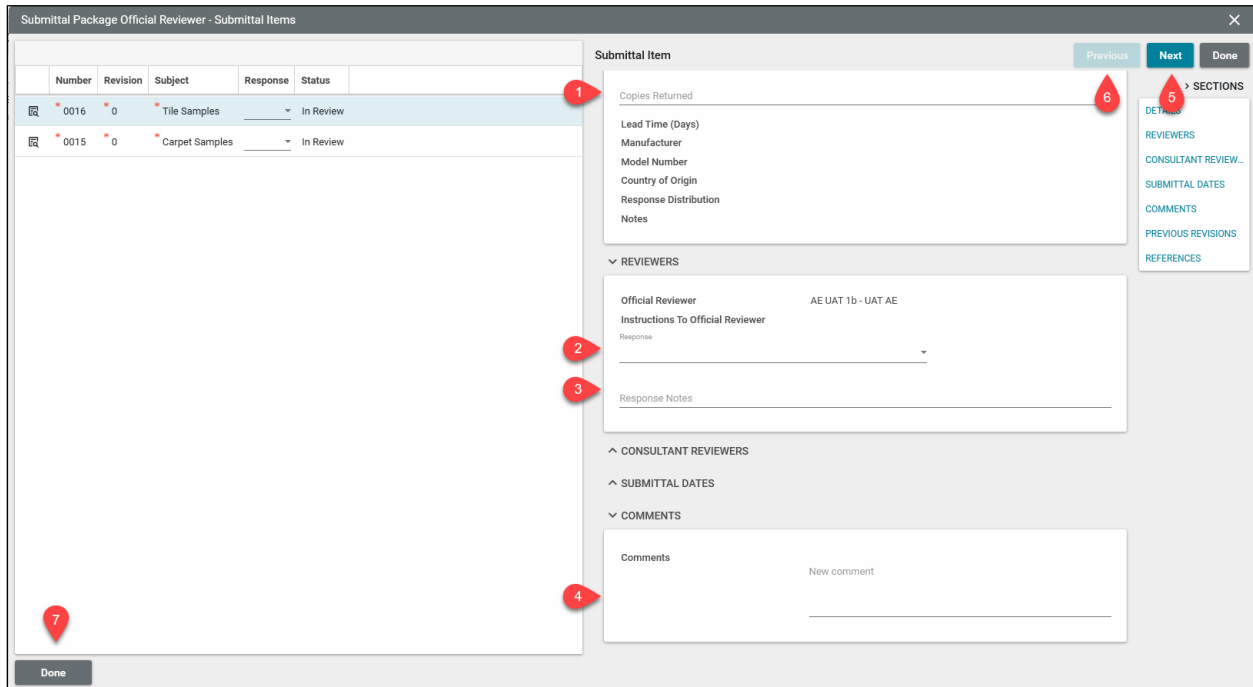
7. If a simple response is sufficient, the **Official Reviewer** can select the appropriate value from the **Response** drop-down list.
8. If additional information is needed, the **Official Reviewer** can use the flyout button to update any of the editable fields for each **Submittal Item**.

▼ SUBMITTAL ITEMS

<input type="checkbox"/>	Number	Revision	Subject	Response	Status
<input type="checkbox"/>	* 0016	* 0	* Tile Samples	<input type="text"/>	In Review
<input type="checkbox"/>	* 0015	* 0	* Carpet Samples	<input type="text"/>	In Review

There are several fields that can be edited in the Submittal Item Detail:

1. Copies Returned
2. Response
3. Response Notes
4. Comments
5. After all updates have been made to the first **Submittal Item**, click the **Next** button to advance to the next **Submittal Item**
6. Click the **Previous** button to return to the prior **Submittal Item** in the list
7. After all updates have been made to all **Submittal Items**, click the **Done** button in the lower left corner of the screen.

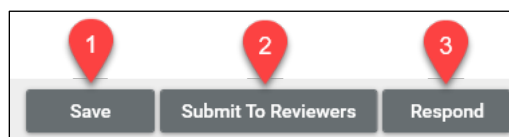


Comments Section

9. Add any comments if needed to the **New Comment** field in the Comments section

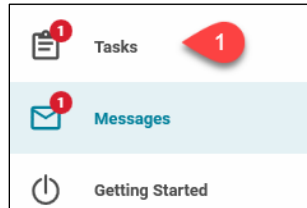
Action Buttons

10. Click the **Save** button to complete the update of the **Submittal Package Task**.
11. Click the **Submit to Reviewers**. This will send a Task to the **Consultant Reviewer(s)** selected earlier to continue the review process. The Task for the Official Reviewer remains open until the **Consultant Reviewer(s)** complete their review(s).
12. Selecting the **Respond** button records the responses entered and closes the Task.



Consultant Reviewer(s) Continues Review

1. Logged in as the **Consultant Reviewer**, click on the Tasks App located in the left navigation pane.
2. Click the **Submittal Package** task to open the record.



FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP
AE UAT 1b	Review Requested for Submittal Package 0009 - (Interior Design Samples)	11/22/2021	1/22/2021	Submittal Packages

Submittal Items Section

The Consultant Reviewer can only provide Reviewer Notes for the Submittal Items.

3. **Consultant Reviewer** will use the flyout button to update the Reviewer Notes fields for each **Submittal Item**.
4. Complete the **Reviewer Notes** field, adding any input needed for the review process.
5. After the **Reviewer Notes** have added to the first **Submittal Item**, click the **Next** button to advance to the next **Submittal Item** in the list.
6. Click the **Previous** button to return to the prior **Submittal Item** in the list.
7. After updates have been made to all **Submittal Items**, click the **Done** button in the lower left corner of the screen.

SUBMITTAL ITEMS					
	Number	Revision	Subject	Status	
	0016	0	Tile Samples	In Review	
	0015	0	Carpet Samples	In Review	

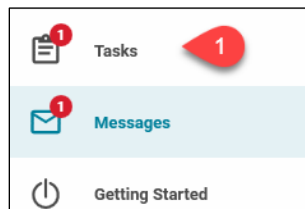
Action Buttons

8. Click the **Save** button to complete the updates for the **Submittal Package** Task.
9. Click the **Respond** button to close out the Task and turn the Submittal Package review back over to the Official Reviewer.



Official Reviewer Finishes Review

1. Logged in as the Official Reviewer, click on the Tasks App located in the left navigation pane.
2. Click the Submittal Package task to open the record.



FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP
GSA PM UAT 1b	Review Requested for Submittal Package 0009 - (Interior Design Samples)	11/22/2021	2/5/2021	Submittal Packages

Submittal Items Section

After the Consultant Reviewers complete their review, the **Official Reviewer** will review their notes and make a final determination on the **Submittal Package Review**.

3. The **Official Reviewer** will use the flyout button to evaluate the **Reviewer Notes** for each **Submittal Item**.
4. The **Reviewer Notes** can be evaluated for the first **Submittal Item**.
5. Enter any final comments needed for the Submittal Item in the **New Comments** field.
6. Click the **Next** button to advance to the next **Submittal Item** in the list.
7. Click the **Previous** button to return to the prior **Submittal Item** in the list.
8. After evaluating all **Submittal Items'** Reviewer Notes, click the **Done** button in the lower left corner of the screen.

Submittal Items

Number	Revision	Subject	Response	Status
* 0016	* 0	* Tile Samples	Accepted as Submitted	In Review
* 0015	* 0	* Carpet Samples	Accepted as Submitted	In Review

Submittal Package Official Reviewer - Submittal Items

Number	Revision	Subject
* 0016	* 0	* Tile Samples
* 0015	* 0	* Carpet Samples

Submittal Item Previous **Next** Done

CONSULTANT REVIEWERS

Instructions

Order	Reviewer	Response Due Date	Response Date	Reviewer Notes
CM UAT 1b - UAT CM		12/5/2021	11/22/2021	Notes 1

SUBMITTAL DATES

COMMENTS

Comments

New comment

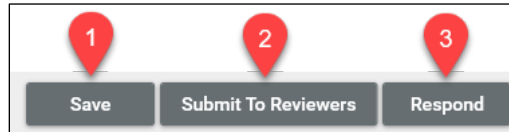
SECTIONS

- DET
- REVIEWERS
- CONSULTANT REVIEW...
- SUBMITTAL DATES
- COMMENTS
- PREVIOUS REVISIONS
- REFERENCES

Done

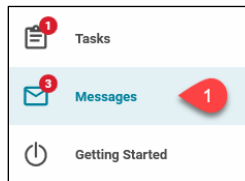
Action Buttons

9. Click the **Save** button to complete the update of the **Submittal Package** Task
10. Click the **Submit to Reviewers** button. This will send a Task to the **Consultant Reviewer(s)** selected earlier to continue the review process. The Task for the Official Reviewer remains open until the **Consultant Reviewer(s)** complete their review(s).
11. Selecting the **Respond** button records the responses entered closes the Task. This also notifies any contacts identified earlier in the **Response Distribution** field.

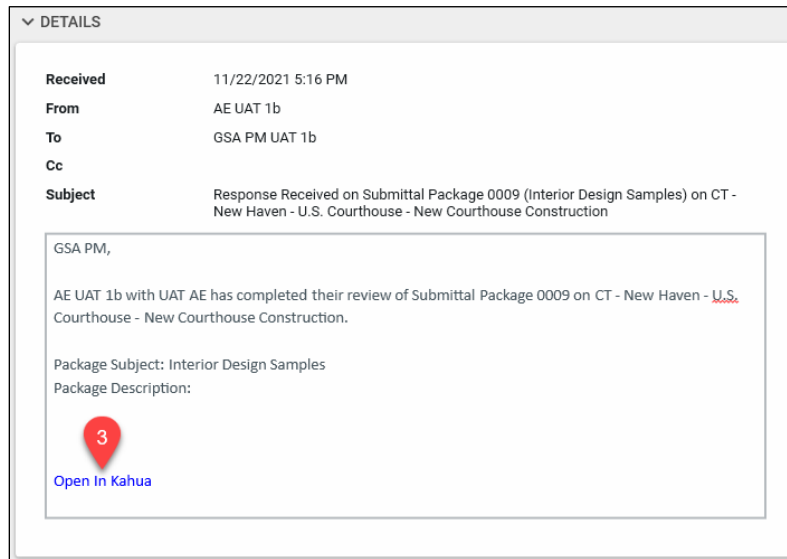


Submittal Coordinator Reviews Final Responses

1. Logged in as the Submittal Coordinator, click on the **Messages** App located in the left navigation pane.
2. Select the appropriate Submittal Package message.
3. From the Detail Section click on the link **Open in Kahua**
4. Review the package information from the Submitting Vendor.
5. Review the Official Reviewer's determination.

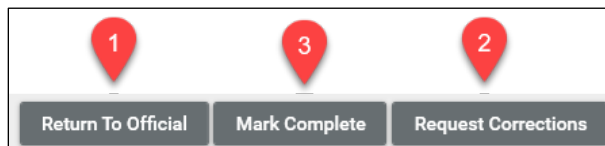


View: Inbox			
<input type="checkbox"/>	FROM	SUBJECT	RECEIVED
<input type="checkbox"/>	AE UAT 1b	Response Received on Submittal Package 0009 (Interior Design Samples) on CT - New Haven - U.S. Court...	11/22/2021 5:16 PM



Action Buttons

6. If the Submittal Coordinator still has questions or items were submitted incorrectly, click **Return to Official**. The official reviewer will work with the contractor to correct and resubmit the package.
7. If details should be updated that are not clear, click on the **Request Corrections** button. This returns the **Submittal Package** to the **Submitting Vendor** to make corrections and resubmit the **Submittal Package** with the requested corrections.
8. If everything is correct, click the **Mark Complete** button and then clicks the **Distribute** button which is used to notify the contractor the **Submittal Package** is approved. Send the Message to necessary recipients after checking the “Copy to Communications” box.



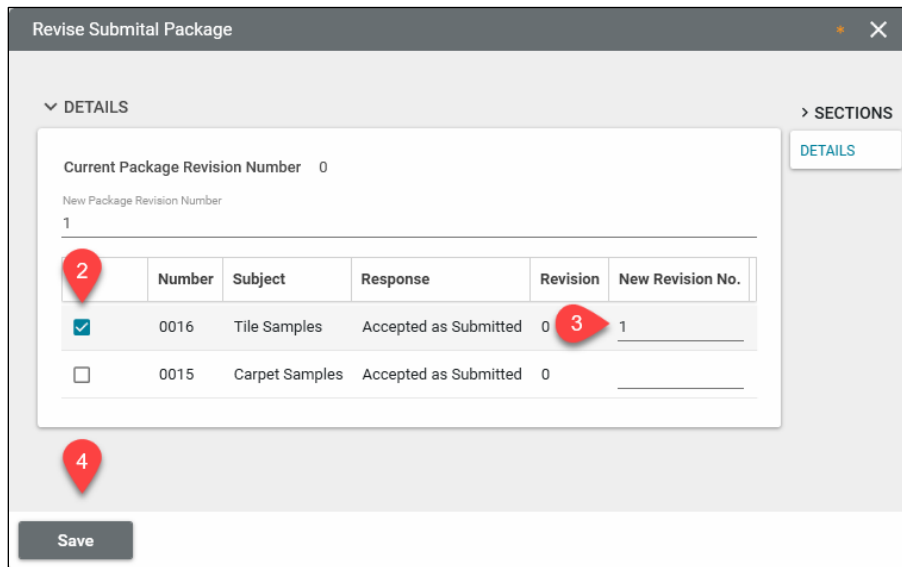
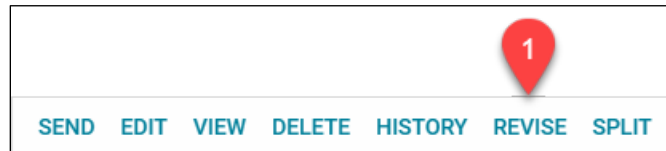
Submittal Coordinator Initiates Revision

If any of the items in the package should be revised before the Submittal Package is marked as complete, the Submittal Coordinator can begin the revision process.

1. From the Options Bar, click on the **Revise** option
2. Place a check in the boxes next to each Submittal Item that needs to be revised. This will automatically populate the new revision number for the line items.

Note: At least one item must be selected before the Revise Submittal Package window can be saved.

3. Enter a **New Revision No.** if the auto-assigned number is not the preferred option.
4. Click **Save** button.



Action Buttons

After initiating the revision, the Submittal Coordinator will determine which path the revision should follow by selection from one of the four actions available. Each of these will begin one of the processes already outlined in the QRG.

1. Assign to Coordinator
2. Submit to Reviewers
3. Mark Complete
4. Request Submission

