Trimble Unity Construct - Submittals Setup Guide

September 2024

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Submittals Setup

The Trimble Unity Construct Submittals module helps the project team actively manage the full submittal process, confirming that the contractor's planned work on the job site will meet the designer's intentions as detailed in the project specifications. This module has streamlined the process to make it easy for subcontractors, general contractors (GC), submittal coordinators and design reviewers to collaborate within a single system.

Certain key items need to be configured before you can use the Submittals module efficiently. Submittal permission settings should be applied before the start of the submittal process to ensure all users are able to perform their expected duties.

In the Submittals setup process, you can manage:

- Submittal settings
- Custom fields
- Submittal package layouts
- Mail merge templates

Access Submittal Setup

Trimble Unity Construct Administrators can modify submittal settings in the Administration Tools section located in the Setup module.

To access the submittal setup

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Submittals**. The following submittal setup options are displayed:
    - **Submittal Options**: Use the options in this feature to specify settings for submittal items, submittal packages, the submittal register and manage private comments.
    - **Custom Fields**: Use this feature to add custom fields for submittal items or submittal packages.
    - **Submittal Package Layouts**: Use this feature to define the columns displayed on the Submittal Package page.
    - **Mail Merge Templates**: Use this feature to add mail merge templates to be used while extracting data from Trimble Unity Construct and exporting it into a Microsoft Word® or Adobe PDF® document.

Submittal Permissions

Submittal permissions affect how users interact with the system. These settings should be applied before the start of the submittal process to ensure all users are able to perform their expected duties.

Permission Levels

The Submittal module has four permission levels:

View Submittals

Users in this role can view submittal items and packages. This permission is typically given to design reviewers and to subcontractors who need to reference the submittal documentation, but are not directly participating in the review process.

> **Warning:** A user with this permission is NOT blocked from viewing comments and attachments while a submittal is in the review process.

Add/Edit Submittals

Users in this role can add and edit submittal items and packages, import a submittal register, create a submittal package, and attach documents to submittals. This permission blocks the user from viewing comments and attachments while the submittal is in design review, and until the submittal coordinator releases the final package to the contractor. This permission level is typically intended for the general contractor who is serving as the “air traffic controller” for the submittal review documentation. Sometimes the owner’s project manager handles this function.

> **Warning:** This permission also gives access to the project-level Submittal Settings, and therefore should be carefully controlled.

Create Submittals

Users in this role can create new submittal items and packages, import submittal registers and submit the documentation to the general contractor. This permission level is intended for subcontractors who are kicking off the design review of some or all of the submittal items in order to relieve some of the documentation burden from the General Contractor. This permission blocks the user from viewing comments and attachments while the submittal is in design review, and until the submittal coordinator releases the final package to the contractor.

The Create permission allows team members to create revisions and close their own submittal items. Own items are defined as submittal items where the team member was the original author or is the current "Held By" person.

> **Note:** Once at least one role has been granted the Create Submittals permission, then the Subcontractor Options section is visible in the project-level Submittal Settings page.

Manage Submittals

Users in this role can edit the settings on the project-level Submittal Settings page.

To manage submittal permissions

1. Click **Setup**.
2. In the Administration Tools section on the left pane, expand **Users**.
3. Click **Permissions By User**. Individual users are listed in the tabs on the Permissions By User page.
4. Click the name of the user whose permissions you'd like to change. The permissions settings are now editable.
5. Click the **Submittals** tab.

   From this page, choose to assign submittal permissions by role or by user.

6. In either the **Roles** section or the **Users** section, select the check box(es) for the permission settings you'd like to assign.
7. Click **Save Changes**.

Submittal Options

Trimble Unity Construct Administrators can modify submittal settings in the Administration Tools section located in the Setup module.

To access the submittal settings options

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Submittals**. The submittal settings are displayed.
3. Expand **Submittal Options**. The following submittal options are displayed:
    - **Settings**: Allows you to enable or disable the ability for users to modify system-generated dates, manage required fields for submittal items and allow comments and attachments to be hidden from review.
    - **Submittal Package**: Allows to you specify how submittal packages are created, ordered, and configured in Trimble Unity Construct.
    - **Submittal Register**: Allows you to configure the status options that will be used by the submittal coordinator during the review process. See Manage Submittal Register Options for more details.
    - **Private Comments**: Allows you to select the roles that are able to view and add private comments. See Manage Private Comments for more details.

Submittal Settings - Admin

The Submittal Settings page allows you to specify the following submittal settings for the module.

Allow Editing of System-Generated Dates

Trimble Unity Construct automatically tracks and keeps a log of all user interactions within the system. A record of every transaction is captured and ultimately, reports can be generated based on this data. By default, the **Allow System Generated Submittal Dates to be Modified** option is not selected.

Enabling this feature allow users with Add/Edit Submittal permissions to modify the following system-generated submittal dates:

- Date Submitted for Review
- Date Review Completed
- Consultant Review Complete Date.

Although this setting allows date changes, a history of these changes are also tracked in Trimble Unity Construct. The date changes were made and by whom can still be obtained through history logs and reporting. You may want to allow the modification of system generated dates if the submittal approvals and updates occur outside of Trimble Unity Construct. In such a case, updates are manually entered by a Trimble Unity Construct user.

To allow users to modify system generated submittal dates

1. Open Submittal Settings.
2. Expand **Submittal Options** and click **Settings**.

   The Submittal Settings page is displayed.
3. In the **System Generated Dates** field, select the **Allow System Generated Submittal Dated to be Modified** check box.
4. Click **Save**.

Enable Visibility of Draft Submittals

When this setting is turned on, all team members who have the View Submittals permission will be able to see Submittal Register Items and Packages that are in Draft status. When this account setting has been enabled, draft items and packages will also be included in Standard and BI reports for this module.

To enable visibility of draft submittals

1. Open Submittal Settings.
2. Expand **Submittal Options** and click **Settings**.

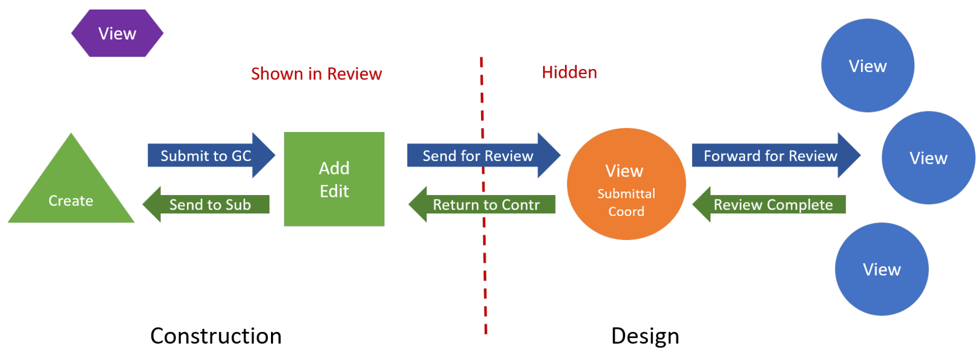
   The Submittal Settings page is displayed.
3. In the **View draft submittals** field, select the **Allow all users to view draft items and packages** check box.
4. Click **Save**.

Allow Comments and Attachments to be Hidden from Review

When the ‘Allow comments and attachments to be hidden’ setting is enabled, only the design review team can view attachments and comments during the review period, and this information is “hidden” from blocked team members. The submittal coordinator decides which attachments and comments are “shown” as part of the final review package visible to construction.

Team members who are blocked from hidden information are those with:

- Add/ Edit Submittal permission (typically general contractors)
- Create Submittal permission (typically subcontractors)
- View permission who have not been included in the review process by a submittal coordinator (purple symbol – typically field staff)

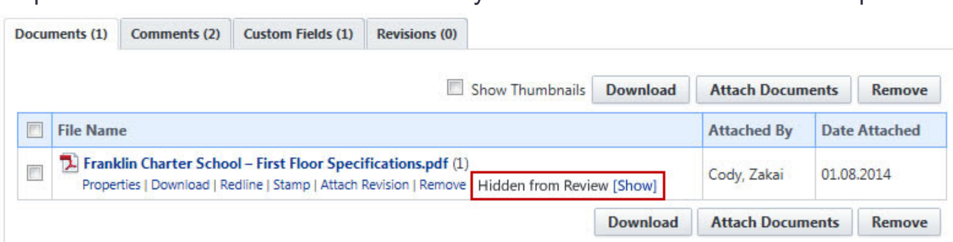


Hide Comments and Attachments from Review

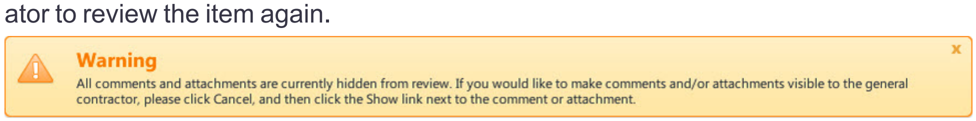
Benefits

The benefit of using the ‘Allow comments and attachments to be hidden’ setting is to prevent the construction team from acting on early, incomplete design reviews. The submittal coordinator transmits a single clear direction to the contractor and avoids the confusion of conflicting comments and markups provided by various discipline reviewers.

When enabled, submittal coordinators have an option to "Show" comments and attachments next to each available item. Before returning items back to the contractor, submittal coordinators need to review each reviewer’s comment and attachment. The coordinator determines whether to show each comment / attachment in the final response to construction. Alternatively, the coordinator may keep all reviewer responses hidden and add a new summary comment to send as the final response



If the submittal coordinator forgets this step and ALL comments/ attachments for a submittal item are hidden when the Return to Contractor action is taken, a warning message will prompt the submittal coordinator to review the item again.



> **Note:** Before changing the Hide Comments and Attachments feature, be sure to effectively communicate the implications to pertinent members of your organization so they understand how it will affect their submittal review process. This is critical to review with submittal coordinators because they will have a new step in their response to submittal items.

In summary, here are some of the main things to keep in mind:

- This is an account-wide setting. Once activated, every project will follow the Hidden Attachments/ Comments process.
- Comments and attachments will be hidden from the GC and subcontractors by default until they are made visible by the submittal coordinator.
- Submittal coordinators must review each comment/ attachment and decide which to make visible to the construction team (GC and subcontractors).

Using the 'Restrict view of Hidden comments to only submittal coordinators and reviewers of submittal items' setting

Team members with the View Submittal settings are able to view hidden comments and attachments, which are intended for coordination within the design review team only. The main purpose of these team members are to download final submittals or monitor progress (i.e., field staff, executives). However, they may also unintentionally have visibility into unofficial review comments. Enabling this setting will ensure that hidden comments and attachments are only visible to the Design Review team - which is defined as all project submittal coordinators and team members who have received a Forward for Review action.

> **Note:** Any team member with View Submittals permission including external team members can potentially be a recipient of Forward for Review, and therefore be pulled into the Design Review team.

Using the 'Changes Private comments to Public When Shown in Review' setting

This submittal setting only applies to accounts that have enabled the “Allow comments and attachments to be hidden” setting.

When this setting is enabled, any Private comment that is selected by the submittal coordinator to be Shown in Review will automatically be switched to Public status so that it is visible to the entire project team.

This is the recommended configuration so that the construction team can view all information that the submittal coordinator intends for them to receive.

In order for a construction team member to view a final comment/ attachment, the item must be both “Public” and “Shown In Review.”

Using the Show/ Hide Comments and Attachments setting with Private Comments

Private Comments keep certain discussions restricted to a specific list of roles. In submittals, the selected roles are typically the design team, which may be redundant with the Hidden Comments feature.

Private Comments can be utilized to expand the “circle of trust” to roles who are not typically included in the submittal review process. An example may be internal executives who want to view all discipline review comments, not just the final response sent to the construction team. This role would need View submittal permissions, and inclusion in the submittal Private Comments list.

Some accounts may choose to use Private Comments only and disable the Show/Hide Comments feature. In this scenario, the submittal reviewer roles are added to the Submittal Private Comments setting list, and the “Private by Default” option is selected. Prior to returning the submittal to the construction team, the submittal coordinator adds the final summary Public comment/ attachments. All of the Private comments remain visible only within the review team.

To allow comments and attachments to be hidden from review

1. Open Submittal Settings.
2. Expand **Submittal Options** and click **Settings**. The Submittal Settings page displays.
3. Select the **Allow comments and attachments to be hidden** check box.
4. Click **Save**.

Allow Submittal Item Fields to be Edited While in Review

Mistakes that may be made by the construction team on submittal packages or items can sometimes lead to inaccurate and unclear reports, missing notifications and poor accountability to the project team members.

In such cases, submittal coordinators and project administrators may need to edit details on submittal items and packages while they are in review.

To allow editing while in review

1. Open Submittal Settings.
2. Expand **Submittal Options** and click **Settings**. The Submittal Settings page displays.
3. Under the In Review field, select the **Allow Submittal Coordinator and Administrators to edit submittal item fields while in review** check box.
4. Click **Save**.

Manage Required Fields for Submittal Items

Administrators have the ability to designate submittal fields as required. Some fields are required by default and cannot be changed, but additional fields can be enforced to ensure data needed for operations and reporting is always captured.

In some cases, submittal coordinators and project administrators may need to edit fields on submittal items and packages while they are in review. Administrators can enable the 'Edit in Review' setting for each field that they want to mark as editable in review.

> **Note:** The 'Edit in Review' column is disabled if the 'Allow Submittal Coordinator and Administrators to edit submittal item fields while in review' setting is not enabled in the In Review section.

To manage required fields

1. Open Submittal Settings.
2. Expand **Submittal Options** and click **Settings**. The Submittal Settings page displays.

3. A list of submittal fields display in the **Manage Fields for Submittal Items** section. In the **Required** column, select the check box for the fields that you want to make required.

   > **Tip:** Select the check box in the header of the **Required** column to select and mark all the fields as required fields.

4. In the **Edit in Review** column, select the check box beside the fields that you want to make editable while the submittal is in review.

   > **Tip:** Select the check box in the header of the **Edit in Review** column to select and mark all the fields as required fields.

5. Click **Save**.

Submittal Package Options

Submittal package settings impact the way packages are ordered, configured and searched for in Trimble Unity Construct. These settings directly influence the task of Creating a Submittal Package.

There are three submittal package settings. An overview of each setting is described below.

To access submittal package options

1. Open Submittal Settings.
2. Expand **Submittals Options**. The submittal options are displayed.
3. Click **Submittal Package**. The Submittal Package Options page is displayed.
4. Select the required options from the page.

   Submittal Package Options

   An overview of each submittal package setting on this page is described below:

   - **Use CSI List:** Click the drop-down arrow to select whether a CSI List should be used to classify the submittal packages for this project. Whether this feature is set to yes or no, users can still enter free-form text into this field.
     This is an account level setting that applies to all projects in the account, but it can be overridden at the project level by the administrator or users with add/ create permissions.

     Yes is the default value. When CSI codes are used, they represent the second set of numbers in the submittal package number.

     No will effectively remove the second Submittal Package setting option below: **CSI List to Use**. While creating a submittal package, the CSI Codes drop-down list will not display on the Submittal Package page if this feature is set to No. However, a space will be provided for users to enter a second set of numbers in the Submittal Package # field. Free-form text entry is allowed, or the field may be left blank for a two-digit set submittal package number.

   - **CSI List to Use:** This option only displays if **Yes** is selected in the **Use CSI List** field. Click the drop-down arrow to select a CSI format. Available options include:

        - CSI MasterFormat 1995
        - CSI MasterFormat 2004
        - CSI MasterFormat 2012
        - User Defined List

    - **Best Practice**

      If "User Defined List" is selected, the package numbering will use the construction codes from the Account Setup module, which can be loaded with an imported custom list of CSI codes.

    - **Submittal Item Spec Section Populated by CSI Code:** This option is displayed only if **Yes** is selected in the **Use CSI List** field.
    - If selected, the **Spec Section** field on the Add/ Edit Submittal Item page will be a drop-down menu of CSI options as opposed to a free-form entry field. This setting would help reduce errors that could be introduced with free-text entry.
    - **Tip**

      If you track items by spec section, make this a required field to ensure this information is always captured. For instructions, see Manage Required Submittal Fields.

    - **Auto Numbering Packages:**

      Per Code: Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), by division.

      Example

      All submittal packages in division one are numbered in sequential order. All submittal packages in division two are numbered in sequential order, and so forth.

      Per Project: Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), regardless of division.

      Example

      Submittal packages are numbered sequentially in the order in which they are created, regardless of division.

    - **Allow Items to be Added After Review Starts:** Selecting this box enables the **Add Items** button on the Submittal Packages Item tab to allow selection from the Draft Submittal Items list. This applies to open packages after being sent for review to the submittal coordinator. When this is turned on, team members with the following permissions can add items:
        - Create permission for the packages they authored
        - Add/ Edit permission
        - Administrators
    - **Allow Revision Items to be Added to Existing Packages**: Selecting this box adds a drop-down list for Submittal Package when creating a submittal revision. From the drop-down, you can either create a new package in the same series (same package number and incremented revision), OR you can select an existing open package in the series to attach the

revised item to. The revised submittal item cannot be added back into the same package that it currently exists in. For projects with large numbers of resubmittals, this helps consolidate the number of packages in review.
This setting is independent from the "Allow Items to be Added After Review Starts" setting above. Revisions can be added to any open package within the package number series, even if it has been forwarded for review. For projects with large numbers of resubmittals, this helps consolidate the number of packages in review.

5. Click **Save**.

Manage Required Submittal Fields

Administrators have the ability to make submittal fields required in order to ensure data needed for operations and reporting is always captured.

To manage required fields

1. Go to Submittal Settings.

   For instructions, see Access Submittal Settings.
2. Expand **Submittal Options** and click **Settings**.

   The Submittal Settings page is displayed.
3. A list of submittal fields display in the **Manage Required Fields for Submittal Items** section. Select the check box next to the fields that you want to make required.
4. Click **Save**.

Allow Editing of System-Generated Dates

Trimble Unity Construct automatically tracks and keeps a log of all user interactions within the system. A record of every transaction is captured and ultimately, reports can be generated based on this data. By default, the **Allow System Generated Submittal Dates to be Modified** option is not selected. Enabling this feature allow users with Add/Edit Submittal permissions to modify the dates items were submitted for review, as well as review completion dates. Although this setting allows date changes, a history of these changes are also tracked in Trimble Unity Construct. The date changes were made and by whom can still be obtained through history logs and reporting. You may want to allow the modification of system generated dates if the submittal approvals and updates occur outside of Trimble Unity Construct. In such a case, updates are manually entered by a Trimble Unity Construct user.

To allow system generated submittal dates to be modified

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Settings**.
4. In the **System Generated Dates** field, select the **Allow System Generated Submittal Dates to be Modified** check box.
5. Click **Save**.

Submittal Register Options

On the Submittal Register Options page, you can configure the following:

- Status options - The status options that will be used by the submittal coordinator during the review process. Default options are available, but you can also enter custom statuses.
- Category options - The category options that will be used to classify each submittal item. Each submittal item must be classified by a category, which you will define here. Default options are available, but you can also enter custom categories that the construction team will use when they create register items either via import or individually.

To manage submittal register options

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page displays with the following tabs:

   Status Options Tab

   A description of the fields and buttons located on this tab is provided below.

   - **Add**: Click to add new status options.
   - **Cancel**: Click to discard changes.
   - **Status**: Enter the name of the new status.
   - **Prefix**: Enter an abbreviation for the status.
   - **Description**: Enter a description for the status.
   - **Requires Revision**: Select this check box if revisions will be required when this status is selected by the submittal coordinator. The item cannot be closed until a revision is created.
   - **For Record Only**: Select this check box if this status should be used only for items that you simply need to have a record for, but do not need approved. An example might be for an item that was installed, but should not have been. The owner and the GC may have come to an agreement on the item and settled any issues, but to have a record of this case, the item's status may be set to 'Rec Only'.
   - **Auto-Close Status**: Select this check box if the item will automatically be closed when this status is assigned by the submittal coordinator. This account setting can be overridden at the project level by users with Add/Edit permission or an administrator. For more information, see Submittal Settings Page Overview.
   - **Manage Package Status**: Default package statuses are Draft, Open and Closed. Use this option to base the package status on the items contained in the package instead.
   - **Use Defaults**: Click to use the following list of default statuses:
     - App - Approved
     - AAN - Approved as Noted
     - FRO - For Record Only
     - ONH - On Hold

        - REJ - Rejected
        - REV - Revise
        - RAR - Revise & Resubmit
    - **Delete**: Click to delete selected statuses.
    - **Edit**: Click this link to make changes to the status.
    - **Delete**: Click this link to delete the status.

Category Options Tab

A description of the fields and buttons located on this tab is provided below.

- **Add**: Click to add a new status options.
- **Cancel**: Click to discard changes.
- **Category**: Enter the name of the new category.
- **Description**: Enter a description for the category.
- **Use Defaults**: Click to use the following list of default categories:
    - As- Builts
    - Bid Submittals
    - Certifications
    - Mock Up
    - Operation/ Maintenance
    - Product Data
    - Sample
    - Shop Drawing
- **Delete**: Click to delete selected categories.
- **Edit**: Click this link to make changes to the category.
- **Delete**: Click this link to delete the category.

Status Options

Statuses are configured to give the submittal coordinator the ability to set the status of each submittal item in the register. As submittal packages are routed to the design submittal coordinator they in turn can set the status of each item associated to the package and add notes/ markups as needed.

To add a new submittal status

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. Enter the name of the new status in the **Status** field on the Status Options tab.
5. Enter a status prefix or abbreviation in the **Prefix** field.
6. Enter the following optional details, if needed:

- **Description**: Enter a description for the status.
- **Requires Revision**: Select this check box if revisions will be required when this status is selected by the submittal coordinator. The item cannot be closed until a revision is created.
- **For Record Only**: Select this check box if this status should be used only for items that you simply need to have a record for, but do not need approved. An example might be for an item that was installed, but should not have been. The owner and the GC may have come to an agreement on the item and settled any issues, but to have a record of this case, the item's status may be set to 'Rec Only'.
- **Auto-Close Status**: Select this check box if the item will automatically be closed when this status is assigned by the submittal coordinator. This account setting can be overridden at the project level by users with Add/Edit permission or an administrator. For more information, see Submittal Settings Page Overview.

7. Click **Add**. The new status appears in the **Status** table.

To edit an existing submittal status

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. In the Statuses section of the Status Options tab, click the **Edit** link located left of the item you wish to modify.
5. **The Status Name**, **Description**, and **Prefix** fields are now editable. Make your revisions, and then click **Save**

   > **Note:** In the edit mode, the **Save** link replaces the **Edit** link.

To delete an existing submittal status

To delete an existing submittal status

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. In the Statuses section of the Status Options tab, select the check box next to the status(es) you wish to delete.
5. Click **Delete**. An edit confirmation popup is displayed. Click **OK** to confirm and proceed with deleting the status(es).

To use default submittal statuses

The default submittal statuses are as follows:

- Approved
- Approved As Noted
- For Record Only
- On Hold

- Rejected
- Revise
- Revise & Resubmit
- *New

> **Note:** **New* is the only status that cannot be deleted or modified. All submittal items when added to a submittal package start with a status of NEW until updated by a user with approve submittal permission.

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. In the Statuses section of the Status Options tab, click **Use Defaults**.

To manage submittal package statuses

By default, submittal packages are tracked with the status of Draft, Open or Closed.

Alternatively, you can track the status of a package based on the statuses of the items contained within the package. The Package Status will follow the order of the Status Precedence list.

Example

For example, if the precedence is set as:

1. Revise & Resubmit
2. Approved as Noted
3. Approved

Then a package with one 'Revise & Resubmit'(R&R) item will have a matching 'Revise & Resubmit' Package Status. If there are zero 'R&R' items and one 'Approved as Noted' item, then the package will be in the 'Approved as Noted' status.

Packages where the submittal coordinator has not determined any of the Item statuses (i.e. all items are 'New') will show a status of 'Open'. When a package is closed by the GC, the package status reverts to 'Closed'.

> **Note:** Caution should be used with package statuses if the submittal coordinator does not assign all of the item statuses at once, or adds new items to a package already in review. As soon as one item is assigned a status, the package will also display a package status based on that one item. The Package Status is visible to the construction team even if the package has not been returned to the GC yet, and may give an incorrect impression of the mixed contents.

There are two ways to manage the submittal package statuses; by enabling the track package status feature and by setting a precedence for each status.

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. On the Status Options tab, click **Manage Package Status**.

5. On the Manage Package Status page, select the **Track Package Status** check box to enable this feature.
6. In the **Status Precedence** section, select the status whose precedence you wish you change.
7. Use the controls beside this box (Top, Up, Down, Bottom) to change the position of each status.
8. Repeat steps 6 and 7 for each status whose precedence you wish to change.
9. Click **Save**.
10. A confirmation message displays, warning that all open submittal packages will be updated based on the new precedence order. Click **Continue** to confirm the change.

Category Options

Submittal categories are mainly used for reporting purposes. For example, you might want to run a report that shows all the outstanding shop drawing submittals in the last month. If the shop drawings category is created, the report will only show those results.

The following tasks will help you manage submittal categories:

Add New Submittal Categories

To add a new submittal category

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. Click the **Category Options** tab.
5. In the Add New Category section, enter the name of the new category in the **Category** field.
6. Click **Add**. The new category appears in the **Categories** table.

Edit Existing Submittal Categories

To edit existing submittal categories

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. Click the **Category Options** tab.
5. Click the **Edit** link located left of the item you wish to modify.
6. The **Category Name** and **Description** fields are now editable. Make your revisions, and then click **Save** (In edit mode, the Save link replaces the Edit link).

Delete Existing Submittal Categories

To delete a submittal category

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.

4. Click the **Category Options** tab.
5. Select the check box next to the status(es) you wish to delete.
6. Click **Delete**.

Use Default Submittal Categories

The default submittal categories are as:

- As-Builts
- Bid Submittals
- Certification
- Mock Up
- Operation/ Maintenance Manual
- Product Data
- Sample
- Shop Drawing

To use default submittal categories

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page is displayed.
4. Click the **Category Options** tab.
5. Click the **Use Defaults** button.

Private Comments

The Manage Private Comments - Submittals page allows you to select the roles that are able to view and add private comments. When private comments are enabled, only the roles in the defined list will be able to view and make comments private.
In order to disable Private comments for the Submittals module, you must remove any roles from the Selected Roles section on the Manage Private Comments - Submittals page.

> **Note:** If the **Changes Private comments to Public (visible) when shown in review** setting is enabled on the Submittal Settings page, 'Private' comments are automatically changed to 'Public' when they are shown in review.

To enable private commenting

1. Open Submittal Settings.
2. Expand **Submittal Options**.
3. Click **Private Comments**. The Manage Private Comments - Submittals window displays.
4. In the Manage Private Comments area, from the **All Roles** section, select the role(s) that can view/ add private comments. Click the right directional arrow to add the role(s) to the Selected Roles section.
5. Select the **Set comments to 'Private' by default** check box to automatically make comments entered by the selected roles private. Only users in the selected roles will be able to see these comments.

—Or—

Clear this check box to allow their comments to be public by default and give them the opportunity to make the comments private on a case-by-case basis.

6. Click **Save**.

   —Or—

   Click **Cancel** to discard changes and return to the main Setup page.

Custom Fields for Submittals

To add custom fields for a submittal item or a submittal package

1. Open Submittal Settings.
2. Expand **Custom Fields**.
3. Click **Submittal Item** or **Submittal Package**.
4. Click **Add Field**.
5. Select a data type, and then click **Next**.
6. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
7. Click **Next**.
8. Review the details of the custom field.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

   —Or—

   If details are correct, click **Save**.

Submittal Package Layouts

Submittal Package Layout options allow you to define the columns on the Submittal Package page. Custom layouts benefit users by allowing them to view only the information that is pertinent to them with the option of viewing additional information when necessary. Consolidating this information facilitates reporting, viewing, and tracking. Multiple layouts can be created to serve different purposes.

On the Manage Submittal Package Layouts page, you can perform the following actions:

Add Submittal Package Layouts

To add submittal package layouts

1. Open Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click **Add**. The **Manage Submittal Package Columns** page displays.
4. In the **Layout Name** field, enter a name for the layout.

   A list of all the columns located on the Submittal Package page displays in the box on the left.

5. In the **Columns** area, select the columns you wish to add to the layout from the list on the left. Use the right arrow controls to move the selected columns from the All Columns section on the left to the Selected Columns section on the right.
6. Use the controls on the right side of the page (**Top, Up, Down, and Bottom**) to order the columns as they will display in the layout.
7. Repeat the steps for all the desired columns.
8. Click **Save**.

Delete Submittal Package Layouts

> **Warning:** Deleted submittal package layouts cannot be recovered.

To delete submittal package layouts

1. Open Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the check box next to the layout(s) you wish to delete to select them.
4. Click **Delete**. A confirmation deletion message is displayed.
5. Click **Continue**.

Color Code Submittal Layout Columns

Color coding can help specific sets of information stand out at a glance. If there are information sets that are more important to a user than others, color coding those columns helps you quickly and easily identify this information.

To color code submittal layout columns

1. Open Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the **Color Codes** link located left of the layout name. The **Color Codes** page displays.
4. Select the check box next to the column(s) you wish to color code.

   > **Note:** The row must be checked to enable color coding.
5. In the **Apply To** column, select either **Text** or **Background**.
6. Click the **Low Range Color** drop-down list and choose a color for that column.
7. To continue coding for all columns, even those that are not in the selected layout, select the **Show all columns** check box located at the top of the screen.
8. Click **Save**.

Set Threshold Values

In the Submittal module, thresholds can only be applied to submittal statuses. Setting thresholds is another way to identify important sets of information, but thresholds differ from simple color coding because it allows you to assign minimum, mid range, and high range numerical values for each submittal status. Color codes are assigned to each threshold value to serve as a visual indicator when submittal statuses have reached or surpassed certain thresholds.

Thresholds have to be enabled in order to display on the Submittal Package page. Enable the threshold feature by selecting the Enable Threshold check box located toward the top of the page. This feature can be disabled at any time.

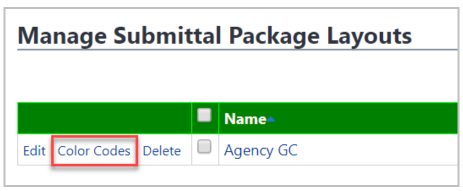
Example

Threshold values might be set for the Approved submittal status. The column may display in red if the value is zero and displays in green if the value is a number greater than zero. This way, the contractor or owner can see at a glance the number of submittal packages that have been approved and how many have not.

> **Note:** In the Submittal module, thresholds can only be applied to submittal statuses. To see additional columns, click the Show all Columns check box located toward the top of the page. Also, the row must be checked to enable the color code and threshold features.

To set threshold values

1. Open Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the **Color Codes** link located on the left side of the layout name.



The Color Codes page displays.

4. Select the **Enable Threshold** check box located in the table header.

Threshold drop-down arrows display with empty fields into which you can enter numeric values.

5. Select the **Enable Threshold** check box of the individual column name that you want to enable color codes for.
6. Enter the threshold numerical values and select a color code for each value.
7. After all threshold values have been assigned, click **Save**.

Add Submittal Package Layouts

To add submittal package layouts

1. Go to Submittal Settings. For more information, see Access Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page is displayed.
3. Click **Add**. The **Manage Submittal Package Columns** page is displayed.
4. In the **Layout Name** field, enter a name for the layout.

   A list of all the columns located on the Submittal Package page is displayed in the box on the left.
5. In the **Columns** area, select the columns you wish to add to the layout from the list on the left. Use the right arrow controls to move the selected columns from the All Columns section on the left to the Selected Columns section on the right.
6. Use the controls on the right side of the page (**Top, Up, Down, and Bottom**) to order the columns as they will display in the layout.
7. Repeat the steps for all the desired columns.
8. Click **Save**.

Delete Submittal Package Layouts

Warning: Deleted submittal package layouts cannot be recovered.

To delete submittal package layouts

1. Go to Submittal Settings. For instructions, see Access Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the check box next to the layout(s) you wish to delete to select them.
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   Note: The row must be checked to enable color coding.
5. In the **Apply To** column, select either **Text** or **Background**.
6. Click the **Low Range Color** drop-down list and choose a color for that column.

7. To continue coding for all columns, even those that are not in the selected layout, select the **Show all columns** check box located at the top of the screen.
8. Click **Save**.

Related Topics:

- Set Threshold Values

Set Threshold Values

In the Submittal module, thresholds can only be applied to submittal statuses. Setting thresholds is another way to identify important sets of information, but thresholds differ from simple color coding because it allows you to assign minimum, mid range, and high range numerical values for each submittal status. Color codes are assigned to each threshold value to serve as a visual indicator when submittal statuses have reached or surpassed certain thresholds.

Thresholds have to be enabled in order to display on the Submittal Package page. Enable the threshold feature by selecting the Enable Threshold check box located toward the top of the page. This feature can be disabled at any time.

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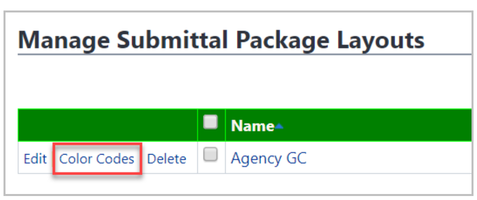
> **Note:** In the Submittal module, thresholds can only be applied to submittal statuses. To see additional columns, click the Show all Columns check box located toward the top of the page. Also, the row must be checked to enable the color code and threshold features.

To set threshold values

1. Go to Submittal Settings. For instructions, see Access Submittal Settings.
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the **Color Codes** link located on the left side of the layout name.



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6. Enter the threshold numerical values and select a color code for each value.
7. After all threshold values have been assigned, click **Save**.

Mail Merge Templates for Submittals

Mail merge templates allow you to extract data from Trimble Unity Construct and export it into a Microsoft Word® or Adobe PDF® document. This eliminates the need to enter information into a Word document manually and reduces the margin for error.

In the Submittal module, mail merge templates can be created for submittal items or submittal packages. These templates are used in a number of ways. When generating a transmittal, you can do so based on any of the mail merge templates you've created. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once, in a ready-to-read format.

The procedures for working with submittal mail merge templates are:

Add Submittal Mail Merge Templates

It is recommended that you download the default Submittal template to start with. Although this template can be modified, the default one is complete with all necessary field mappings. Having a template on file also gives you the ability to make necessary changes as they arise, without having to start over from scratch.

To add a mail merge template

1. Open Submittal Settings.
2. Click **Mail Merge Templates**. The Mail Merge Template page is displayed.
3. To make changes to the default template, click the **Download Default Submittal Template** link.
4. Save this document locally and make any necessary changes to it.
5. On the Mail Merge Templates page, click **Add New Template**.

   The **Add Mail Merge Template** page is displayed.

6. Enter the following details in the required fields:
    - **Name**: Enter a name for the template.
    - **Status**: Select either option to mark the template's status as Active (available for use) or Draft.
    - **Output**: Set either option to specify the output type (Word or PDF).
    - **File**: Click **Choose File** to search for and upload the default submittal template saved in step 4.
7. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to. Click the right arrow to move the project(s) to the Assigned to these Projects area on the right.

    > **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.
8. Click **Save**.The template is added to the list on the Mail Merge Templates page.

Edit Submittal Mail Merge Templates

To edit submittal mail merge templates

1. Open Submittal Settings.
2. Click **Mail Merge Templates**. The Mail Merge Templates page is displayed.
3. Click the name of the template you wish to edit. The Mail Merge Template Details page is displayed.
4. Click **Edit**. The Edit Mail Merge Template page is displayed.
5. Make any or all of the modifications listed below:
    - **Name***: Edit the name specified for the template.
    - **Description**: Add, edit or remove the description of the template.
    - **Status***: Select either option to mark the template's status as Active (available for use) or Draft.
    - **Output***: Set either option to specify the output type (Word or PDF).
    - **File***: Click **Choose File** to search for and upload a new or edited submittal template.

    > **Note:** Ensure that you do not leave any of the required fields blank (marked with an *).
6. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to. Click the right arrow to move the project(s) to the Assigned to these Projects area on the right. Click the left arrow to move the project(s) back to the Projects area on the left.

    > **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.
7. Click **Save**.