



UNIVERSITY of HAWAII®

Construction and Project Management System

Contractor's User Guide



November 10, 2016





Aloha Contractors!

In October 2016, the University of Hawai'i implemented a new construction and design project management system using the e-Builder program to administer all aspects of a capital project. The goal is to provide visibility into the status of our projects so all stakeholders have access to real-time information and ensure projects are delivered on-time and on-budget. If your project is selected to participate in this program, we ask for your kokua in working with us to utilize the e-Builder environment. As will be further explained below, we will provide the training necessary to make this successful for both your company and ours.

e-Builder is a web-based capital program management solution that captures project data and utilizes electronic workflow to track business processes and generate reports that support a project at both the micro and macro level. For example, all Requests for Information (RFIs), Change Order Proposals (COPs), Invoice Approvals, and Submittals will be reviewed and processed through e-Builder. This Contractor's User Guide, in conjunction with our in-person training program, provides instructions for contractors to navigate e-Builder and process these documents in the system.

We are excited to launch this new initiative at the University of Hawai'i, as we strive toward being a high performing mission-driven system. We deeply appreciate your willingness to support our efforts and participate in this program.

If we can improve our process or program in any way, I encourage you to reach out to my staff, Lisa Dau (808-956-3307) or Jeffrey Tagami (808-956-6803).


With Warmest Mahalo,

A handwritten signature in black ink, appearing to read 'Jan Gouveia'.

Jan Gouveia,

Vice President for Administration

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This Contractor's User Guide provides instructions to help *contractors* navigate and process documents using the University of Hawai'i's Construction and Project Management System (*e-Builder*). This guide provides step-by-step instructions covering four major processes:

REQUESTS FOR INFORMATION, CHANGE ORDER PROPOSAL, INVOICES & SUBMITTALS

1.0 BASIC NAVIGATION AND MODULES

The following sections provide simple instructions to navigate e-Builder and familiarize the user with the modules and screens. The sections are as follows:

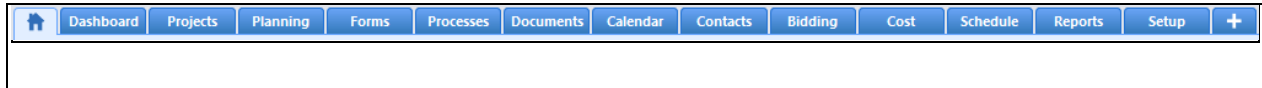
- 1.1 Navigation
- 1.2 Home Module
- 1.3 Projects Module
- 1.4 Processes Module
- 1.5 Documents Module

1.1 Navigation

This section provides a brief overview of the general navigation.

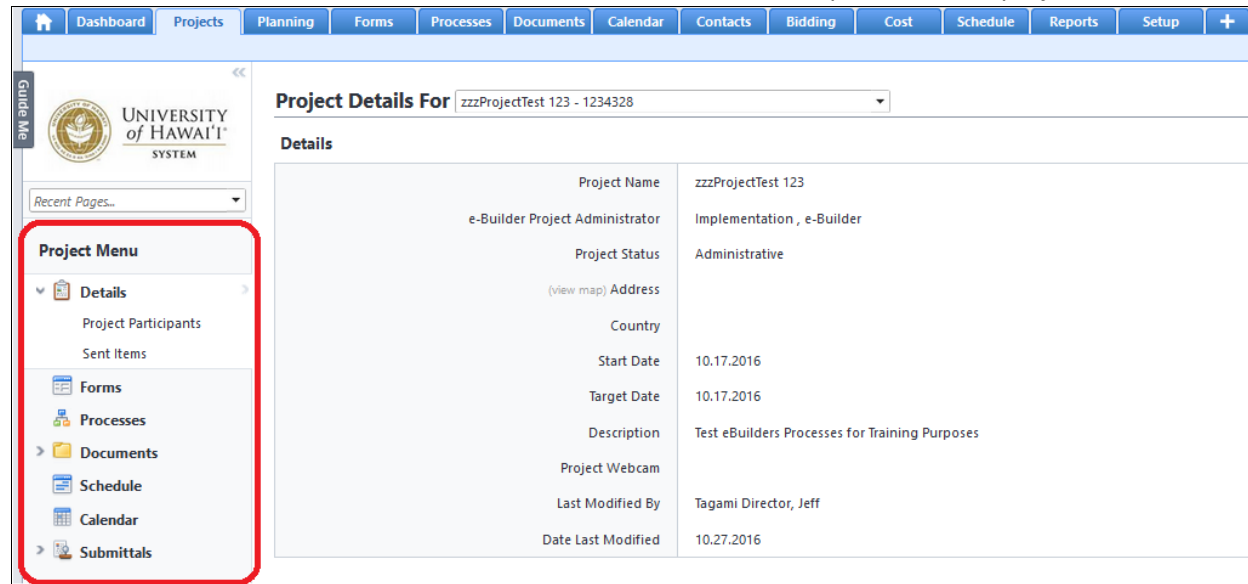
1.1.1 Modules Menu

Each tab at the top of the e-Builder screen represents a different module. Clicking on a tab opens the respective module and displays a list of projects associated with the user.



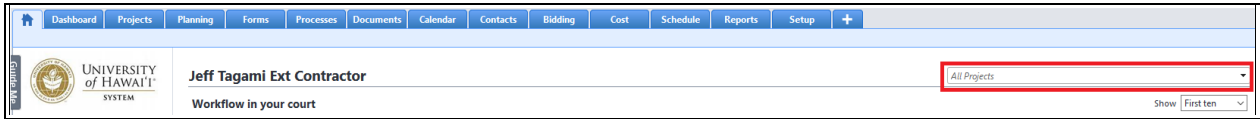
1.1.2 Project Menu

Clicking on a project in the Project Module displays detailed project information. The Project Menu, located in the left sidebar, allows users to access different modules specific to that project.



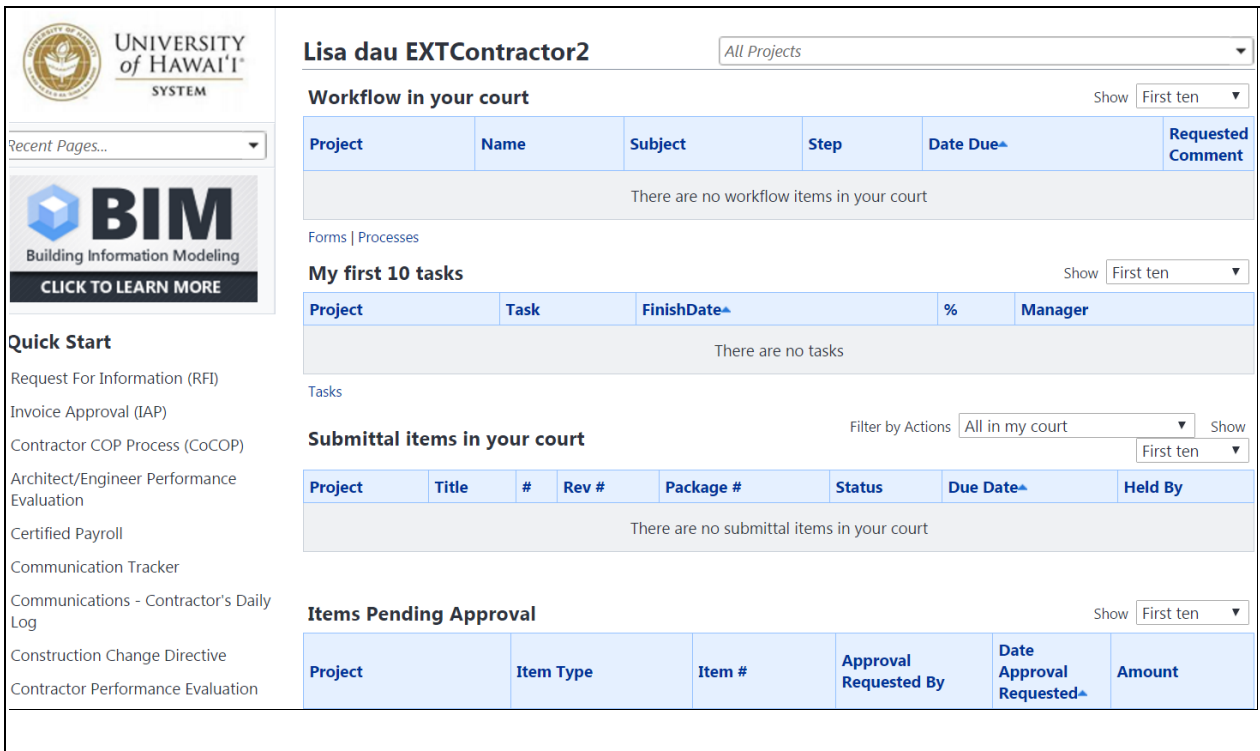
1.1.3 Project Navigation within Modules

At the top of every module, the “All Projects” drop-down menu lists all of the projects a user is associated with. The module information for a given project can be shown by clicking on the drop-down menu and selecting a project.

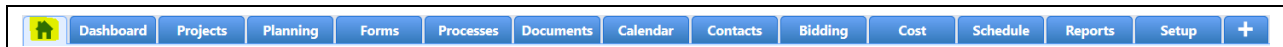


1.2 Home Module

The Home module is shown by default upon logging in. It is a centralized place where users can see items that require their attention. Each time the home module is accessed or refreshed, it is populated with current data, ensuring that all information is provided in real time.



Important: Contractors only need to access 2 sections of the Home module: the **Workflow in your court** section and the **Submittal items in your court** section.



1.2.1 Workflow in your court

The **Workflow in your court** section lists all workflow process instances that require you to take an action or perform a review. Clicking on the document "Name" (i.e. CoCOP-1) opens the item.

Workflow in your court Show First ten					
Project	Name	Subject	Step	Date Due	Requested Comment
zzzProjectTest 123	CoCOP - 1	University of Hawai'i - Change Order Number 0	Attach Form 96		
zzzProjectTest 123	RFI - 1	University of Hawai'i - Unforeseen Condition	Initiator Revise		

Forms | Processes

1.2.2 Submittal items in your court

The **Submittal items in your court** section lists all submittals requiring your attention.

Submittal items in your court Filter by Actions All in my court Show First ten							
Project	Title	#	Rev #	Package #	Status	Due Date	Held By
There are no submittal items in your court							

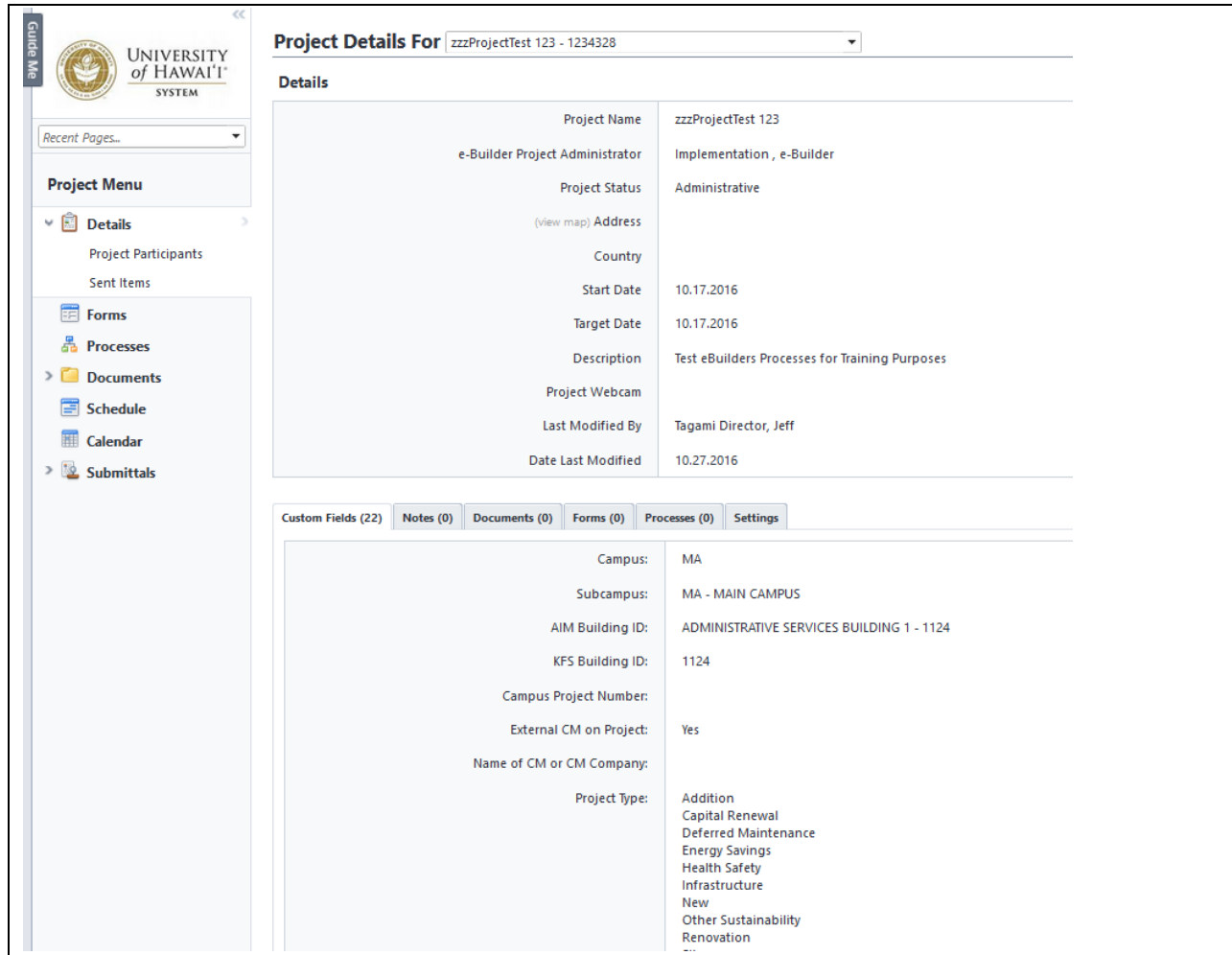
1.3 Projects Module

The Projects Module houses important project details such as the project's address, related web links, start and target dates, and participants. Click on the Project Name or select it from the All Projects dropdown menu to display the project details.

Project Name	City	State / Province	Site Administrator	Project ID
zzzProjectTest 123			Implementation, e-Builder	1234328
zzzTestProject			Implementation, e-Builder	100001

1.3.1 Project Details

Click on the Project Name to display the **Project Details** page. The **Project Details** page shows general information about the project such as the campus, subcampus, project type, subsystems affected, etc.



Project Details For zzzProjectTest 123 - 1234328

Details

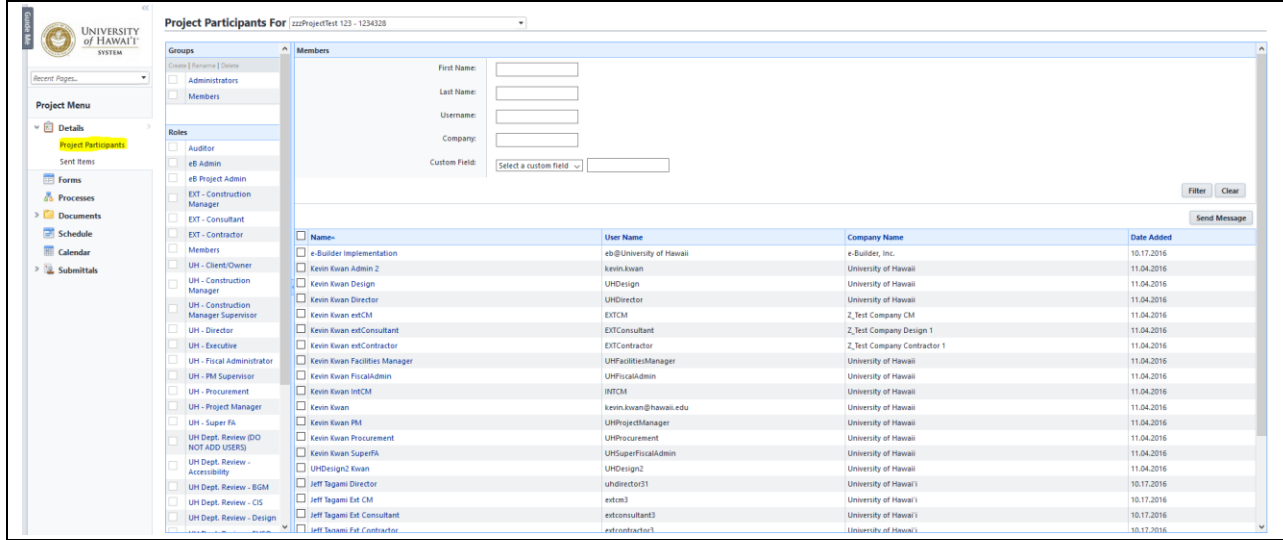
Project Name	zzzProjectTest 123
e-Builder Project Administrator	Implementation , e-Builder
Project Status	Administrative
(view map) Address	
Country	
Start Date	10.17.2016
Target Date	10.17.2016
Description	Test eBuilders Processes for Training Purposes
Project Webcam	
Last Modified By	Tagami Director, Jeff
Date Last Modified	10.27.2016

Custom Fields (22) | Notes (0) | Documents (0) | Forms (0) | Processes (0) | Settings

Campus:	MA
Subcampus:	MA - MAIN CAMPUS
AIM Building ID:	ADMINISTRATIVE SERVICES BUILDING 1 - 1124
KFS Building ID:	1124
Campus Project Number:	
External CM on Project:	Yes
Name of CM or CM Company:	
Project Type:	Addition Capital Renewal Deferred Maintenance Energy Savings Health Safety Infrastructure New Other Sustainability Renovation ...

1.3.2 Project Participants

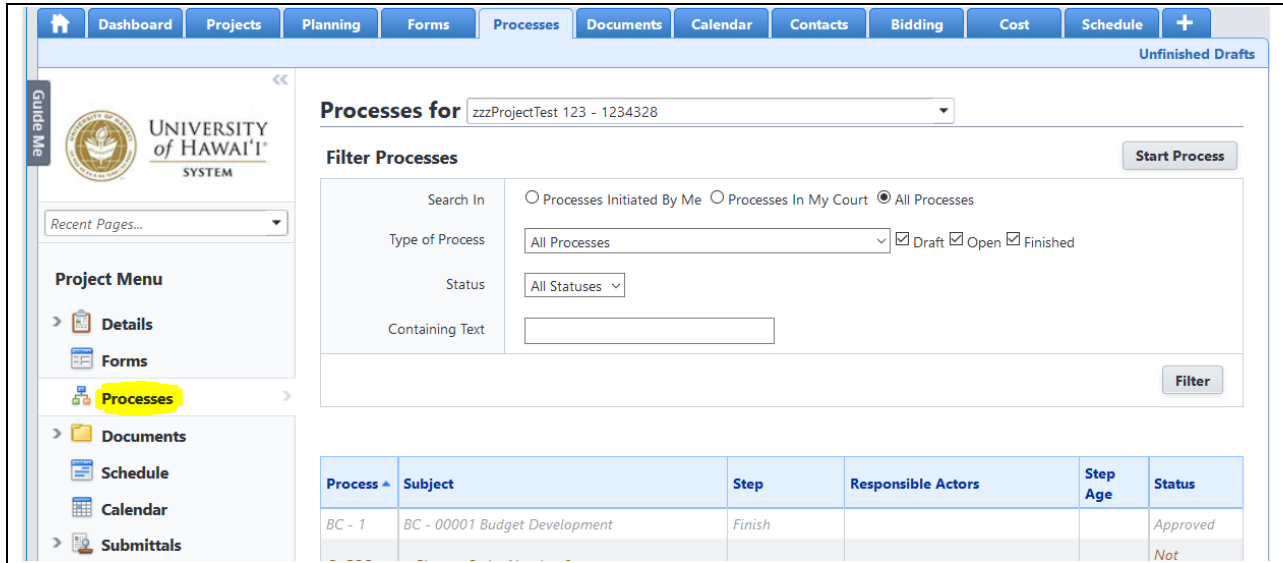
Clicking on **Project Participants** in the **Project Menu** shows a listing of all users associated with the selected project. To see **User Details** such as location, email and phone number, click on the project participant's name.



1.4 Processes Module

The Processes Module allows users to initiate processes (i.e., RFI, COP, IAP (Invoice)). To start a process, users must have a project open or activate one in the Processes Module. The Processes Module is also used to track down the status of workflows.

The filters in the Processes Module can be used to search for specific processes.



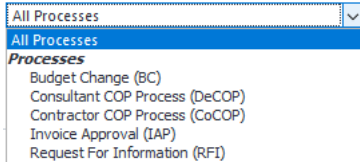
Filter Processes options:

1. **Search In** - Select the radio button that you would like to apply
 - a. **Processes Initiated By Me**

b. **Processes In My Court**

c. **All Processes**

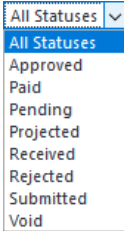
2. **Type of Process** - Select the process from the drop-down menu to search for a specific process or select **All Processes**.



You may also place a check in the **Draft**, **Open**, and/or **Finished** boxes to select the process completion status

Draft Open Finished

3. **Status** - Select from the drop-down menu.



4. **Containing Text** - Input text to search for text within document fields

The search results show the status of processes at a glance.

Process	Subject	Step	Responsible Actors	Step Age	Status
BC - 1	BC - 00001 Budget Development	Finish			Approved
CoCOP	- Change Order Number 0				Not Assigned
CoCOP - 1	University of Hawai'i - Change Order Number 0	Finish			Submitted
IAP	zzzTestProject JT Jeff Tagami Inc. - Payment Number				Not Assigned
IAP	zzzTestProject JT Jeff Tagami Inc. - Payment Number 1				Not Assigned
RFI - 1	University of Hawai'i - Unforeseen Condition	Initiator Revise	Jeff Tagami Ext Contractor	20	Submitted
RFI - 2	University of Hawai'i - Unforeseen Condition	Finish			Submitted
RFI - 3	University of Hawai'i - Clarification	Ext CM Review (2)	Kevin Kwan extCM, Jeff Tagami Ext CM	6	Submitted

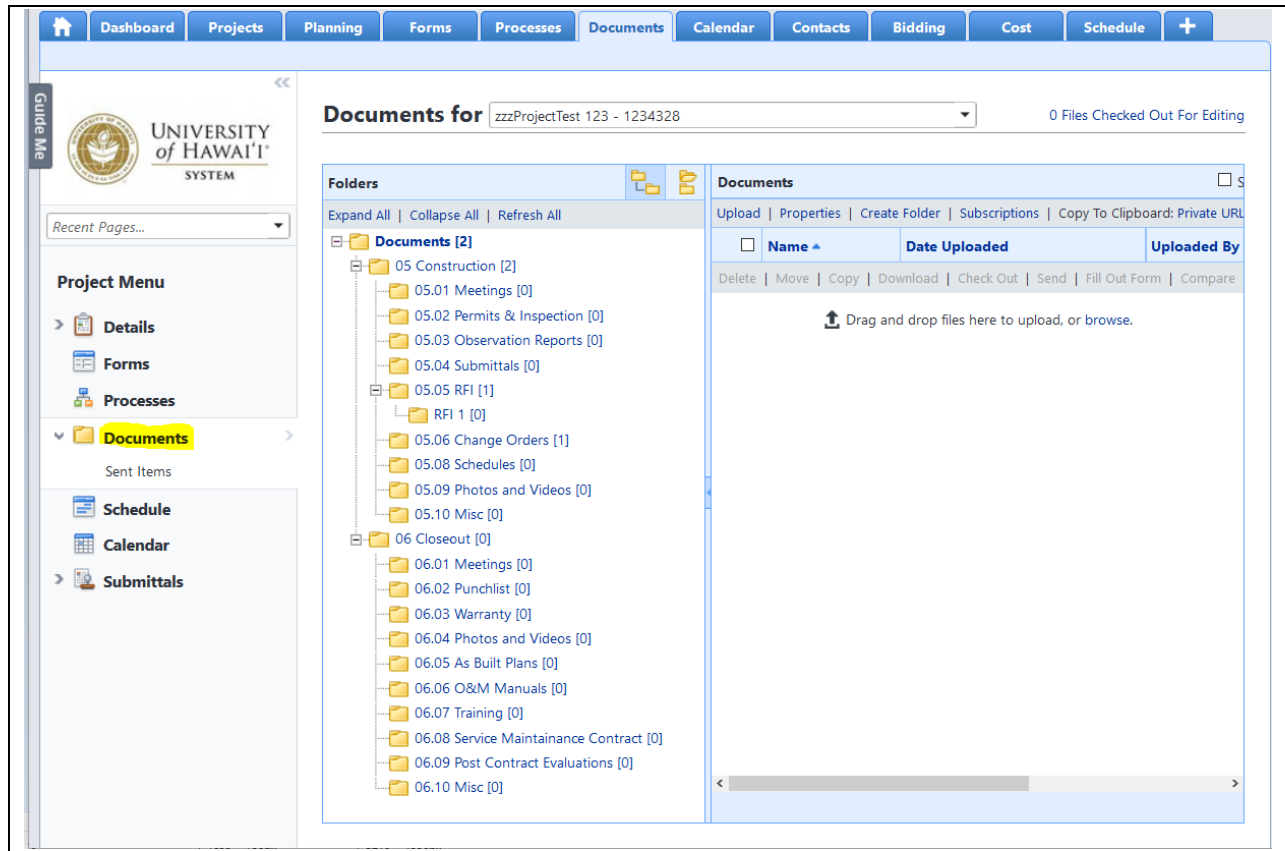
Search Results

- Process** – document reference of the process
CoCOP – Contractor Change Order proposal
IAP – Invoice Approval Process
RFI – Request for Information
- Subject** – a brief description of the process

3. **Step** – the current step of the process
4. **Responsible Actors** – the project participant whose court the process currently resides in
5. **Step Age** – the number of days the current step has been in the project participant's court
6. **Status** – the current status of the process

1.5 Documents Module

The Documents Module is a centralized location to store, organize, and access necessary project files. Access the Documents Module by either clicking on **Documents** in the left-side bar of an individual project's **Project Menu**, or by selecting the "Documents" tab at the top of the screen, then selecting a project. The Documents folder structure is located in the Left Pane with the attached documents appearing in the Right Pane.



2.0 REQUEST FOR INFORMATION

The general workflow for the RFI Process is:

Contractor > External Construction Manager > Internal Construction Manager > Contractor

Contractors are able to initiate Requests for Information (RFIs).

If the result of the RFI is no cost or schedule impact, then this process is complete. However, if there is a cost or schedule impact, the RFI will spawn to a Change Order Proposal and relevant data from the RFI process will be transferred to the COP.

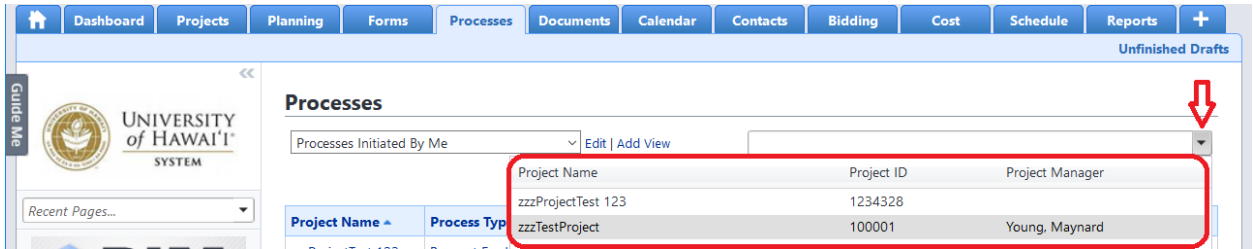
2.1 Request for Information – Contractor Initial Request

Perform the following steps to create an RFI.

1. Go to the **Processes** tab.



2. Click on the drop-down project menu, then select the project.

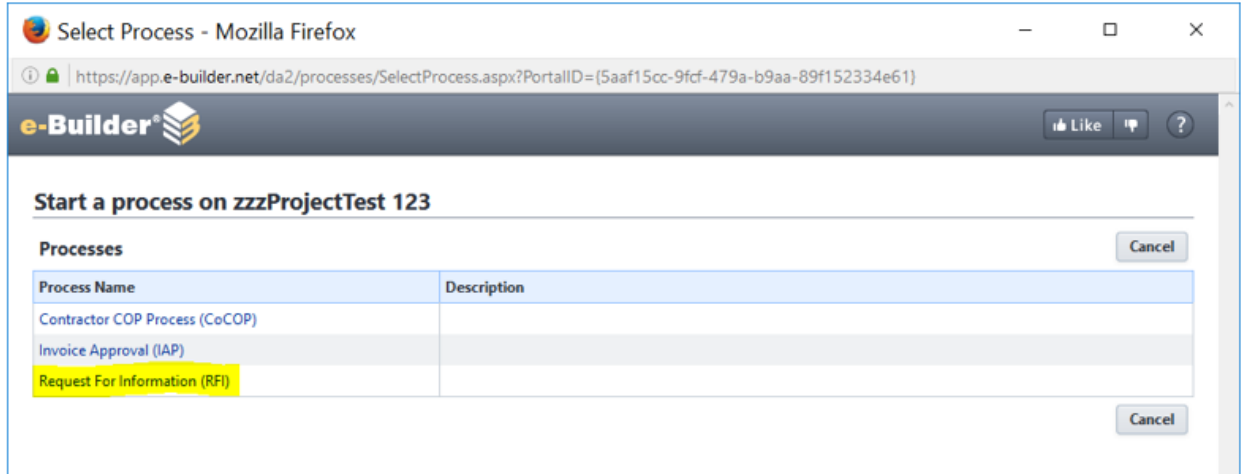


3. The **Processes** page will appear. Click on the **Start Process** button.

Note: You can also switch to another project using the drop-down menu next to **Processes for**.



4. The **Select Process** page will open. Click on **Request for Information (RFI)**.



5. The **Request for Information** page will open. Fill in the relevant fields in the **RFI Information** section.

Note: Red * is a required field.

RFI Information

* Reason for RFI: -- Please select an option --

* Description:

Subcontractor RFI #:

CSI Trade(s):

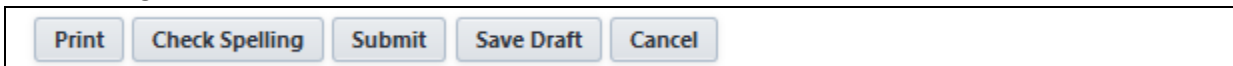
- General Requirements
- Existing Conditions
- Concrete
- Masonry
- Metals
- Wood
- Thermal and Moisture Protection
- Openings
- Finishes
- Specialties
- Equipment
- Furnishings
- Special Construction
- Conveying Equipment
- Fire Suppression
- Plumbing
- HVAC
- Electrical
- Communications
- Electronic Safety and Security
- Earthwork
- Exterior Improvements
- Site Improvements

* Information Requested:

Reference Document:

- a. **Reason for RFI:** Select from the list the option that best suits your request. The following is a list of option definitions:
 - **Clarification:** Clarify the intent of a drawing, specification, or contract provision.
 - **Construction Change Directive:** Authorization to proceed with work prior to approval of a Change Order.
 - **Drawing Issuance:** Issue a drawing associated with an ASI (Architect's Supplemental Instructions) or PCD (Post Contract Document).
 - **Field Instruction:** Instructions on performing work at the job site.
 - **Non-Conformance Notice:** Notice of work failing to meet the requirements of the contract documents.
 - **Plan and Spec Discrepancy:** Conflicting drawings and specifications requirements.
 - **QA/QC Notice:** Notice of work not meeting contract requirements for quality assurance or quality control.
 - **Shop Drawing Comment:** Do not select. This should be handled in the submittal process.
 - **Unforeseen Condition:** Site condition that differs from existing conditions indicated in the contract documents.
 - **Other:** Other reason not noted in the above categories.
- b. **Description:** Type in a description of the RFI.
- c. **Subcontractor RFI#:** Optional to include subcontractor RFI number.
- d. **CSI Trade** checkboxes: Check off the applicable trades affected.
- e. **Information Requested:** Type in the information request clearly.
- f. **Reference Document:** Attach a document to the RFI if applicable.

6. After filling in all relevant information, select one of the actions at the bottom of the screen.



- a. **Print** button will print the RFI.
- b. **Check Spelling** button will perform a spell check in all text fields.
- c. **Submit** button to forward the RFI to the Int CM (or Ext CM if applicable) for review.
- d. **Save Draft** button to save your work and complete at a later time.
- e. **Cancel** button to exit and close the window. (All changes made to previously saved versions and work performed on initial drafts will not be saved.)

After selecting "Submit," the next steps in the workflow depend on the assigned project members. The general workflow is:

External Construction Manager > Internal Construction Manager > Contractor

If there is no Ext CM, it will go straight to the Int CM for review. The Int CM will review and will provide an Int CM Directive to the Contractor.

2.2 Request for Information – Contractor Response

After an Int CM provides a Directive, it is submitted back to the Contractor for confirmation. If the RFI results in a cost or schedule impact (as determined by the Contractor), the RFI will spawn into a Contract Order Proposal. The instructions below explain how to process the RFI response.

- 1a. Once an RFI response is submitted by an Int CM, the Contractor will receive an email notification requesting their approval. Open the email and click on **click here** to access the e-Builder site and have the document opened.

zzzProjectTest 123

Process instance is in your court. To view details or take action, [click here.](#)

Process Details

Project	zzzProjectTest 123
Process	RFI - 2
Subject	University of Hawai'i - Unforeseen Condition
Step	Contractor Confirm Answer
In Step Since	11.01.2016
Last Action	Submit
Last Action Taken By	Jeff Tagami Int CM
Status	Submitted

RFI Information

Reason for RFI	Unforeseen Condition
Description	Type in a Description of the RFI
Subcontractor RFI #	Subconracotor RFI #
CSI Trade(s)	Special Construction,Plumbing
Information Requested	Type in the information request clearly.
Reference Document	

Consultant Response/Supporting Documentation

PCD/ Supporting Document	Sample Doc.pdf
Consultant's Response	Provide a response in this section
Is a Revision Required to the Contract Drawings and/or Specifications?	Yes
Is Drawing Updated?	Yes

Owner Directive

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- 1b. You can also access the RFI by logging into e-Builder and accessing it through the **Workflow in your court** section at the top of the Home screen and clicking on the Name of the document (ex. RFI-2).

Jeff Tagami Ext Contractor All Projects

Workflow in your court Show First ten

Project	Name	Subject	Step	Date Due-	Requested Comment
zzzProjectTest 123	RFI - 1	University of Hawai'i - Unforeseen Condition	Initiator Revise		
zzzProjectTest 123	RFI - 2	University of Hawai'i - Unforeseen Condition	Contractor Confirm Answer		

Forms | Processes

My first 10 tasks Show First ten

Project	Task	FinishDate-	%	Manager
There are no tasks				

Tasks

Submittal items in your court Filter by Actions All in my court Show First ten

Project	Title	#	Rev #	Package #	Status	Due Date-	Held By
There are no submittal items in your court							

Items Pending Approval Show First ten

Project	Item Type	Item #	Approval Requested By	Date Approval Requested-	Amount
There are no items pending approval for the selection.					

[See More Items Pending Approval](#)

2. The **Request for Information** page will appear on the screen.

Instance Details - Mozilla Firefox

https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID={4b413e40-a93d-4570-92fc-b94a1eb8e8db}&InstanceStepID={4

e-Builder Like ?

Request For Information (RFI) - 2

Accept

Project:	zzzProjectTest 123	Project Number:	1234328
Process Document:	RFI - 2 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	Contractor Confirm Answer Show Workflow Diagram	Step Due Date:	
Subject:	University of Hawai'i - Unforeseen Condition		
Status:	Submitted		

Details **Comments (6)** **Attached Documents (1)** **Attached Processes (0)** **Attached Forms (0)** **Attached To (0)**

RFI Information

Reason for RFI:	Unforeseen Condition
Description:	Type in a Description of the RFI
Subcontractor RFI #:	Subconracotor RFI #
CSI Trade(s):	Special Construction Plumbing
Information Requested:	Type in the information request clearly.

3. After reviewing the RFI response, the CM Directive(s) and any other attached documentation, scroll to the bottom of the page to the **Contractor Confirmation** section and input the pertinent information.

The screenshot shows a web browser window titled "Instance Details - Mozilla Firefox". The URL is "https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID={4b413e40-a93d-4570-92fc-b94a1eb8e8db}&InstanceStepID={4...". The page content is divided into several sections:

- Consultant Response/Supporting Documentation:** Includes a PCD/Supporting Document (Sample Doc.pdf), a Consultant's Response field, and questions about revisions and drawing updates.
- Owner Directive:** Includes Ext. CM Directive and Int. CM Directive fields.
- Contractor Confirmation:** This section is highlighted with a red box. It contains a dropdown menu for "Impact" (set to "-- Please select an option --"), and input fields for "Estimated Cost Impact (USD \$)" and "Estimated Schedule Impact (Days)".

At the bottom of the page, there is a "Confirm" dropdown menu and several buttons: "Take Action", "Check Spelling", "Print", "Copy", "Delegate", "Save", and "Cancel".

- a. **Impact** – Options:
Cost, Schedule, Cost and Schedule – the next process (Contract Order Proposal (COP)) will spawn.
Neither Cost nor Schedule. *If there is no cost or schedule impact, the RFI will close.*
 - b. **Estimated Cost Impact** – Provide the estimated dollar amount for the cost impact. If there is no impact, type 0.
 - c. **Estimated Schedule** – Provide the estimated delay in days for the schedule impact. If there is no impact, type 0.
4. After completing the **Contractor Confirmation** section, select one of the actions at the bottom of the screen.

The screenshot shows the bottom of the Contractor Confirmation section. It features a "Confirm" dropdown menu and several buttons: "Take Action", "Check Spelling", "Print", "Copy", "Delegate", "Save", and "Cancel".

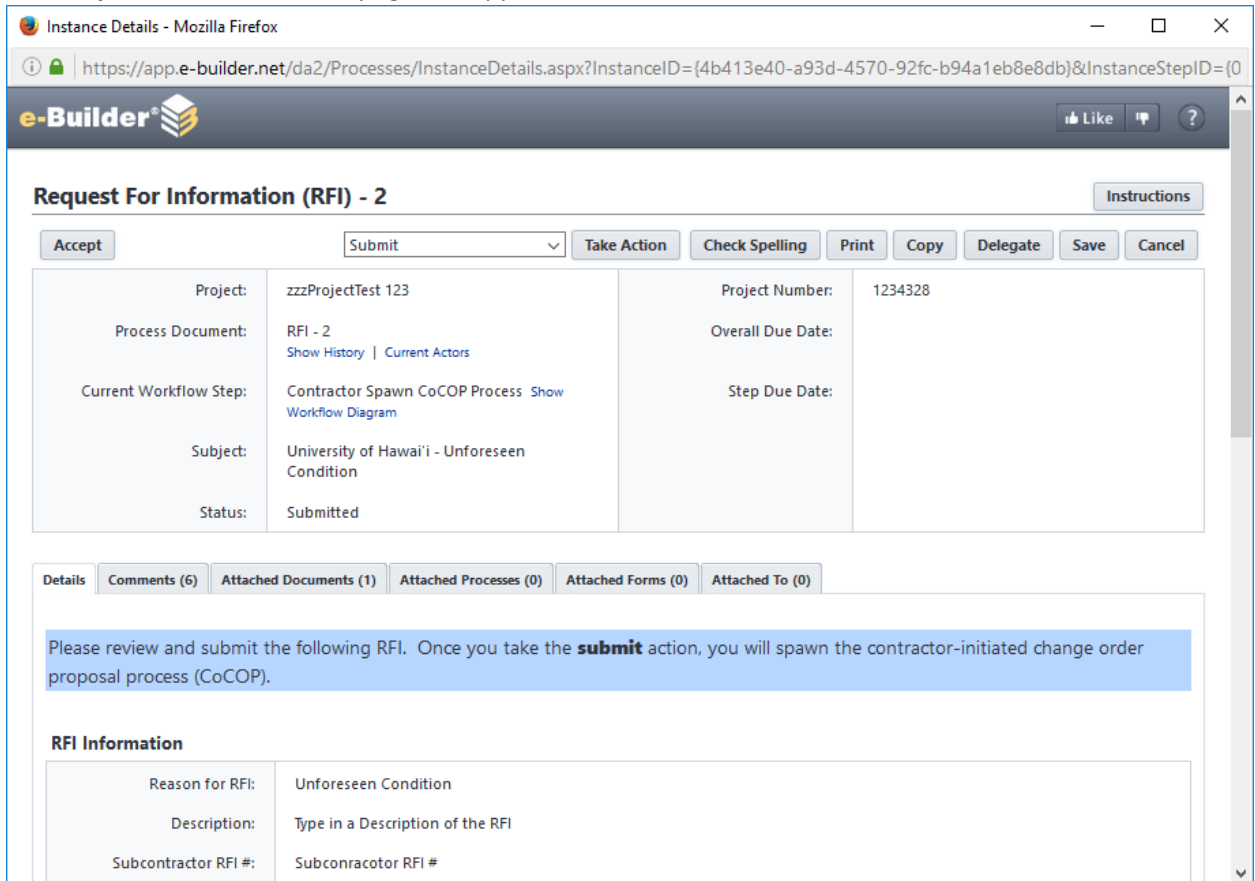
- a. Selecting **Confirm & the Take Action** button will either send a notification to the Int CM (or Ext CM if applicable) if there is a Cost and/or Schedule impact to the project, **OR** will close the RFI if there is neither a cost nor a schedule impact on the project.
- b. Click on the **Print** button to print the RFI.
- c. See the following section on **Delegating** for **Delegate** button.

- d. Click on the **Save** button to save your work and complete at a later time.

2.3 Request for Information – Contractor Spawn Change Order Proposal (COCOP)

An RFI is capable of spawning into a COP and the relevant data from the RFI will transfer over. After an RFI with a cost and/or schedule impact has been reviewed and evaluated by the Int CM, the RFI will return to the Contractor. This is a formality to aid the Contractor in spawning a contractor-initiated change order proposal (COCOP). Perform the following procedures to spawn a COP from an RFI.

- 1a. Once an RFI is submitted by an Int CM, the Contractor will receive an email notification prompting action on an RFI. Open the email and click on **click here** to access the e-Builder site and open the document.
- 1b. You can also access the RFI by logging into e-Builder and accessing it through the **Workflow in your court** section at the top of the Home screen and clicking on the Name of the document (e.g., RFI-2).
2. The **Request for Information** page will appear on the screen.




Request For Information (RFI) - 2	
Project:	zzzProjectTest 123
Process Document:	RFI - 2 Show History Current Actors
Current Workflow Step:	Contractor Spawn CoCOP Process Show Workflow Diagram
Subject:	University of Hawai'i - Unforeseen Condition
Status:	Submitted
Project Number:	1234328
Overall Due Date:	
Step Due Date:	

Details | Comments (6) | Attached Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Please review and submit the following RFI. Once you take the **submit** action, you will spawn the contractor-initiated change order proposal process (CoCOP).

RFI Information	
Reason for RFI:	Unforeseen Condition
Description:	Type in a Description of the RFI
Subcontractor RFI #:	Subconracotor RFI #

3. Click on the **Submit - Take Action** button to spawn a COCOP.
- 4a. Access the new COCOP by going to the **Home**  page and accessing it through the **Workflow in your court** section at the top of the Home screen and clicking on the Name of the document (e.g., **CoCOP-1**)

- 4b. An email notification prompting action to **Attach Form 96** on the COCOP will be sent. Open the email and click on **click here** to access the e-Builder site and open the document.
5. To process the COCOP, only the **Recommended Solution** field must be filled and a **Form 96** must be attached. The **Description of Problem, Impact, Cost Impact, and Schedule Impact** information will carry over from the RFI but may be edited.

Contractor COP Process (CoCOP) - 1

Accept Submit Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	zzzProjectTest 123	Project Number:	1234328
Process Document:	CoCOP - 1 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	Attach Form 96 Show Workflow Diagram	Step Due Date:	
Subject:	University of Hawai'i - Change Order Number 0		
Status:	Submitted		

Details Comments (0) Attached Documents (1) Attached Processes (1) Attached Forms (0) Attached To (0)

General Information

* Description of Problem:

* Recommended Solution:

* Impact:

* Cost Impact (USD \$):

* Schedule Impact (Days):

Contractor Supporting Documents

Initiator Company: University of Hawai'i

* Form 96:

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

6. After providing the required information, click on the **Submit - Take Action** to submit the COCOP. The COCOP will then be reviewed by the respective University staff who will then process the Change Order. When the Change Order has been executed, the Contractor will be notified.

3.0 CONTRACTOR CHANGE ORDER PROPOSAL – INITIATE COCOP

The general workflow for the Contractor Change Order Proposal Process is:

Contractor > External CM > Internal CM > Director

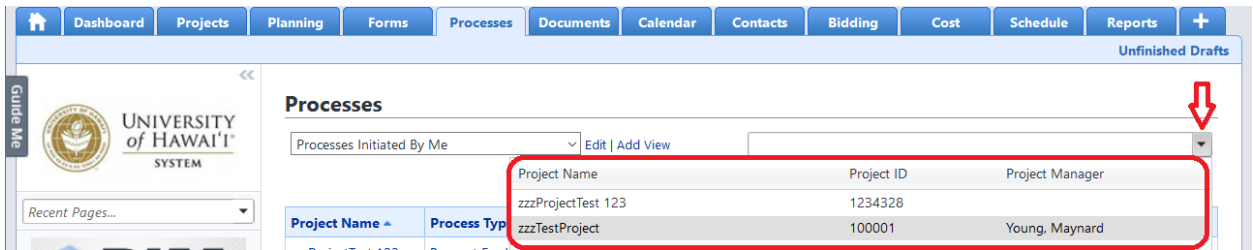
A Contractor is able to create a Change Order Proposal (COCOP) through the system, which has the capability to generate a Change Order (CO).

Perform the following procedures to initiate a Change Order Proposal.

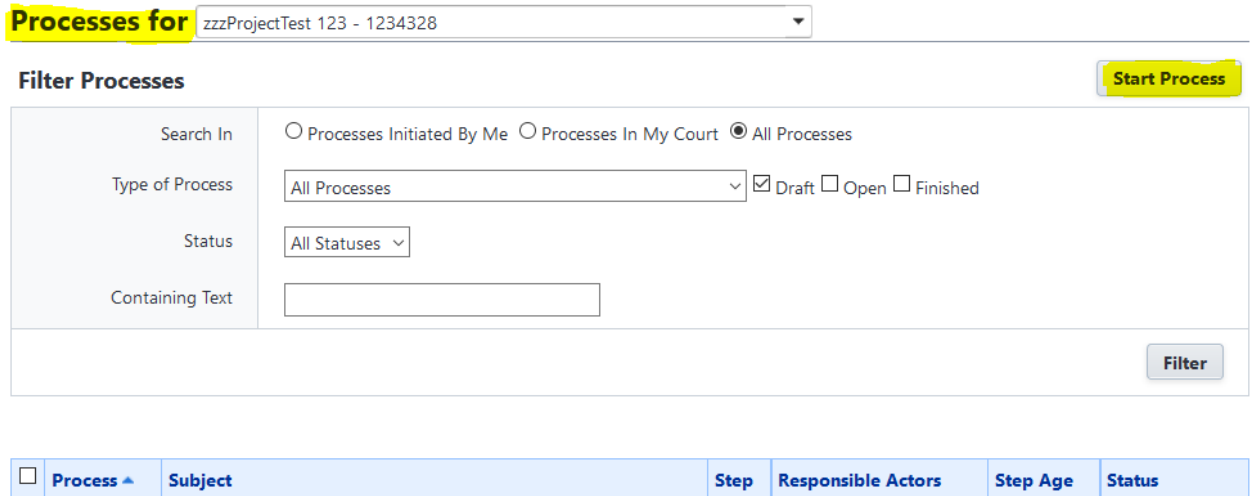
1. Go to the **Processes** tab.



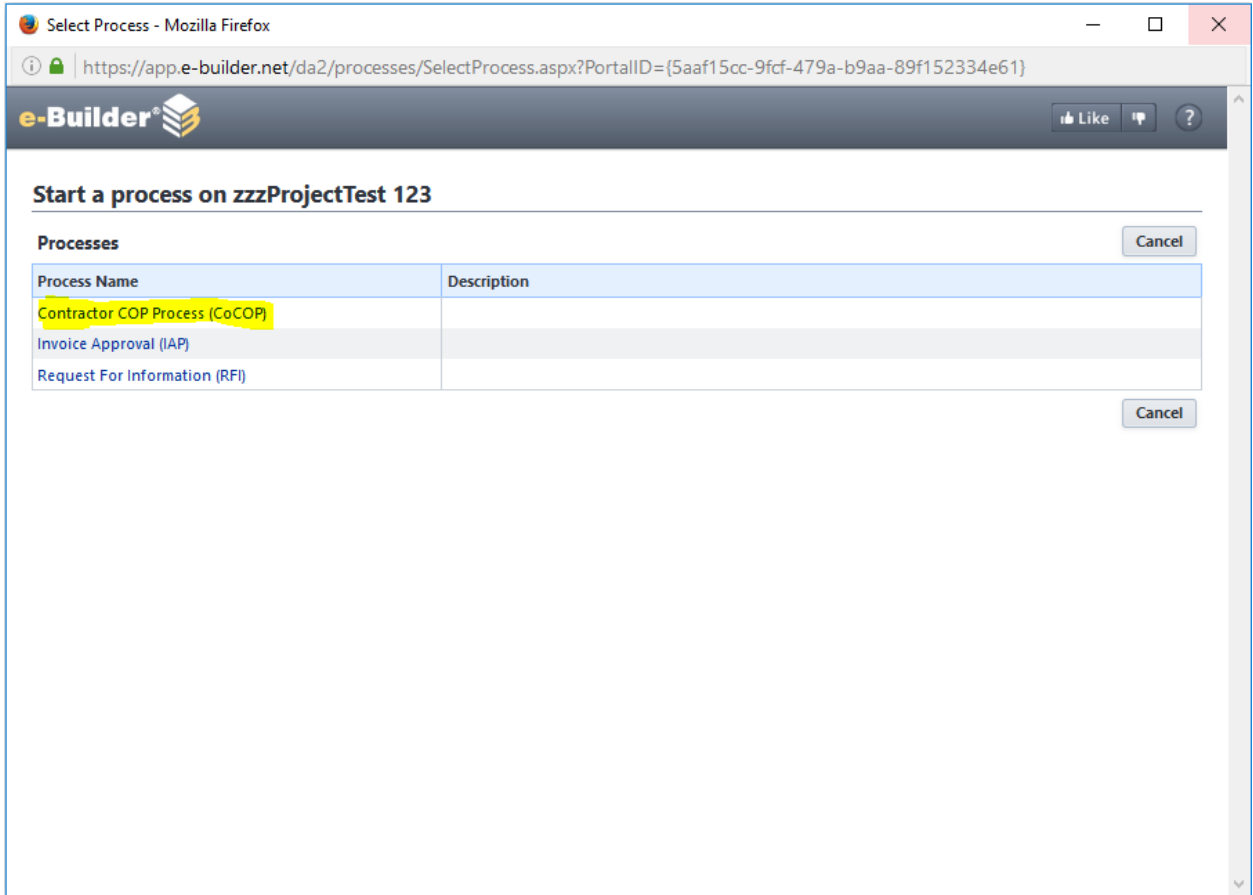
2. Click on the drop-down project menu, then select the project for which you would like to create a COCOP.



3. The **Processes** page will appear. You can also switch to another project using the drop-down menu next to **Processes for**. Click on the **Start Process** button.



4. The **Select Process** page will appear. Click on **Contractor COP Process (COCOP)**.



5. The **Contractor COP Process (COCOP)** page will appear. Fill in the applicable sections.

Start Process - Mozilla Firefox
https://app.e-builder.net/da2/Processes/StartProcess.aspx?PortalID=5aaf15cc-9fcf-479a-b9aa-89f152334e61&ProcessID=4022a4aa-16c

e-Builder

Contractor COP Process (CoCOP)

(Auto-Saved 11.02.2016 4:13 PM)

Start Process [Print] [Copy] [Check Spelling] [Show Workflow] [Submit] [Save Draft] [Delete Draft] [Cancel]

Project: zzzProjectTest 123
Project Number: 1234328
Process: Contractor COP Process
* Subject: - Change Order Number 0

Details | Attached Documents (0) | Attached Processes (0) | Attached Forms (0)

General Information

Please complete all fields in this section.

* Description of Problem:

Recommended Solution:

* Impact: -- Please select an option --

* Cost Impact (USD \$):

* Schedule Impact (Days):

Initiator Company:

Contractor Supporting Documents

Please upload form 96 and "confirm" your upload.

Form 96: [Browse Computer] [Browse e-Builder]

Uploaded Form 96?: Confirm

[Print] [Copy] [Check Spelling] [Show Workflow] [Submit] [Save Draft] [Delete Draft] [Cancel]

a. **General Information section**

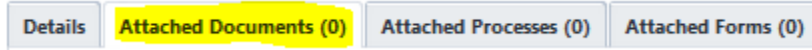
1. **Description of Problem:** Provide a clear and accurate description of the problem.
2. **Recommended Solution:** Provide the proposed recommended solution.
3. **Impact:** Select either **Cost**, **Schedule**, or **Cost and Schedule**.
4. **Cost Impact (USD \$):** Input the cost impact, if applicable.
5. **Schedule Impact (Days):** Input the schedule impact in days, if applicable.

b. Contractor Supporting Documents

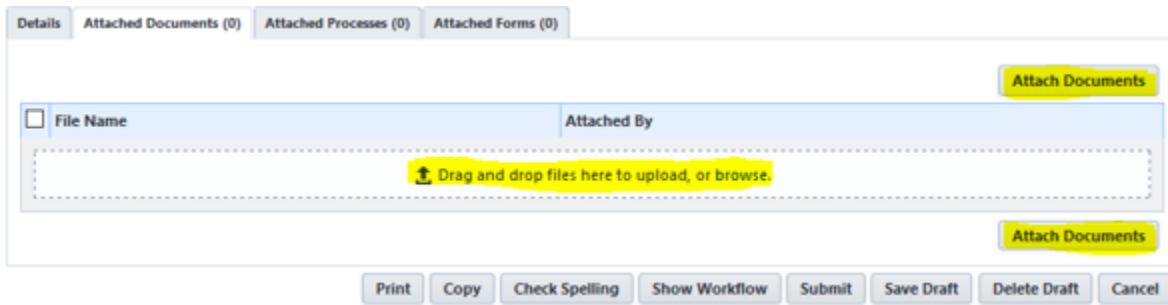
Attach **Form 96** (Change Order Proposal UH FMO-96) which provides the breakdown of materials and cost for this COP.

1. **Browse Computer** - Click and attach the document.
2. **Browse e-Builder** - Do not use – Form 96 will not be in e-Builder.
3. **Uploaded Form 96?** - Check this box if Form 96 is uploaded.

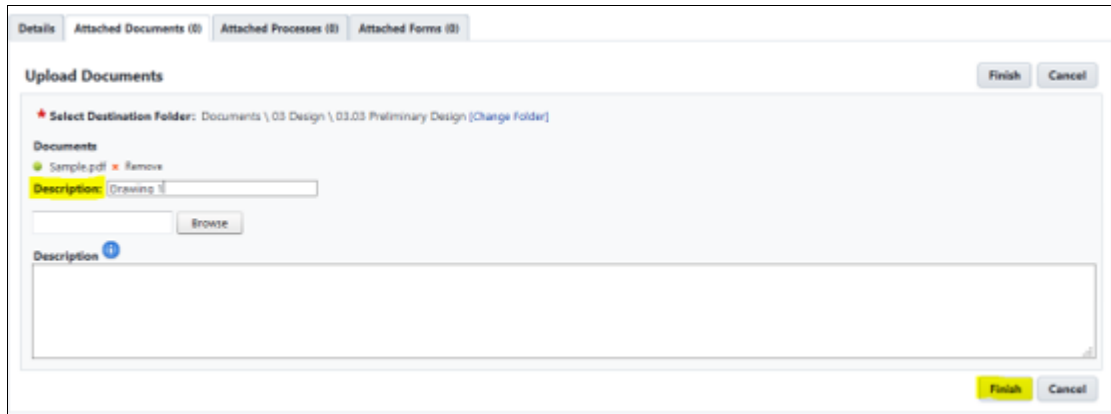
6. To attach additional supporting documentation, click on the **Attach Documents** tab.



7. The **Attached Documents** tab will be displayed. To attach the supporting documentation files either open the windows folder containing the files to drag and drop the files, or click on either of the **Attach Documents** buttons.



a. The following will appear if files are dragged and dropped. A brief description can be filled in the **Description** field if preferred. To select additional files, click on the **Browse** button and select the files or continue to drag and drop from a Windows folder. Click on the **Finish** button to attach the file(s) for this submission.



- b. If the **Attach Documents** button is clicked, the **Attach Documents** page will appear. Click on the **Browse** button to select a file to be uploaded. A brief description can be filled in the **Description** field if preferred. Click on the **Attach Selected** button once all of the files are selected.

Attach Documents - Mozilla Firefox
https://app.e-builder.net/da2/Documents/AttachDocuments.aspx?QS=AdKzw4sP/5uOXSViXMAabNaaf

e-Builder Like ?

Attach Documents from zzzProjectTest 123

Project: zzzProjectTest 123
Process: Design Review

1) Select Attachment Method
 Upload and attach file(s) from your computer
 Attach files from the e-Builder Document module for the zzzProjectTest 123 project

2) Select Files to Upload from Your Computer

File 1

Select a File: Browse...
Description:

File 2 (optional)

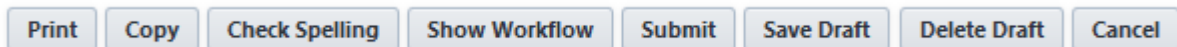
Select a File: Browse...
Description:

3) Select an e-Builder Destination Folder

* Destination Folder: 03.03 Preliminary Design Browse

Attach Selected Cancel

8. After filling in all relevant information, select one of the actions at the bottom of the screen.



- c. **Print** button to print the RFI.
- d. **Copy** button to make a copy of the COCOP, if you have a similar COCOP that you would like to file.
- e. **Check Spelling** button to perform a spell check in all text fields.
- f. **Show Workflow** button to view the workflow process of the COCOP.
- g. **Submit** button to forward the COCOP to the Int CM (or Ext CM if applicable) for review.
- h. **Save Draft** button to save your work and complete it at a later time.
- i. **Delete Draft** button to delete the COCOP from your view.
- j. **Cancel** button to exit and close the window. (All changes made to previously saved versions and work performed on initial drafts will not be saved.)

4.0 INVOICE APPROVAL PROCESS – CREATING AN INVOICE

The general workflow for the Invoice Approval Process is:

Contractor > External CM > Internal CM > Project Manager > Fiscal Administrator

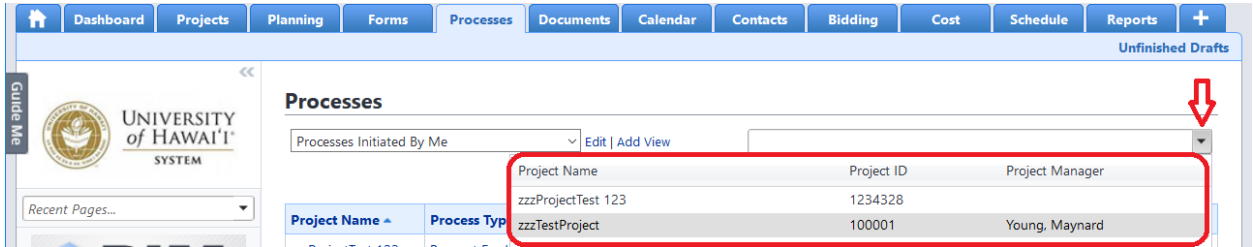
In our system, the Contractor is able to create the invoice and submit it electronically for payment approval.

Perform the following procedures to create an invoice.

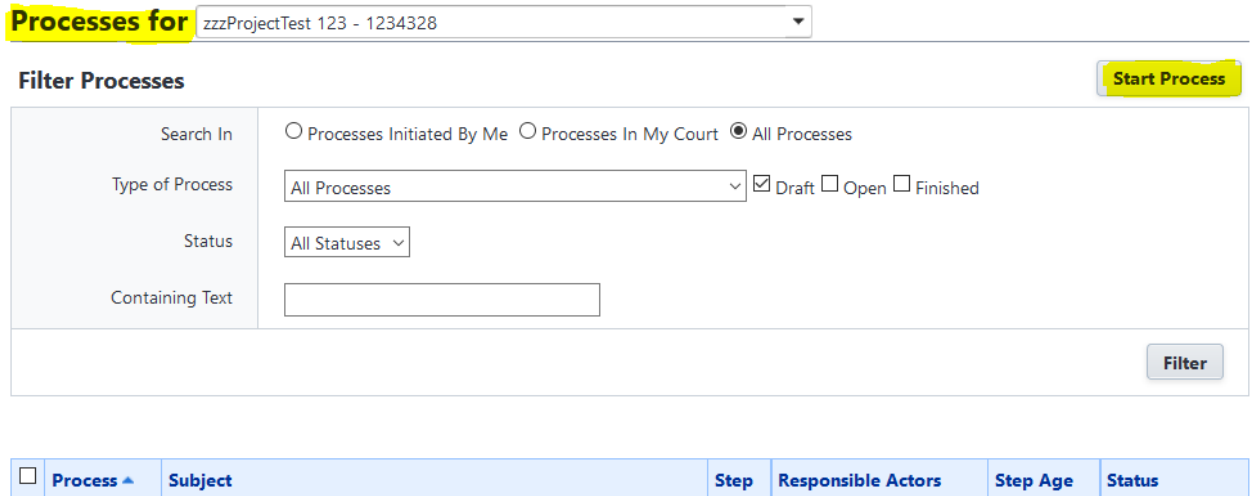
1. Go to the **Processes** tab.



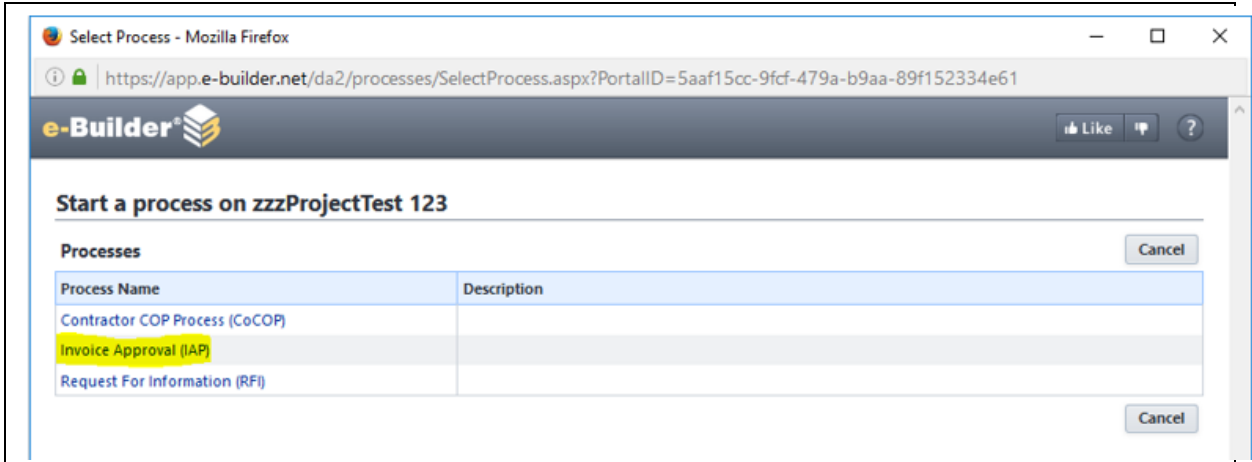
2. Click on the drop-down project menu, then select the project that you would like to create an invoice for.



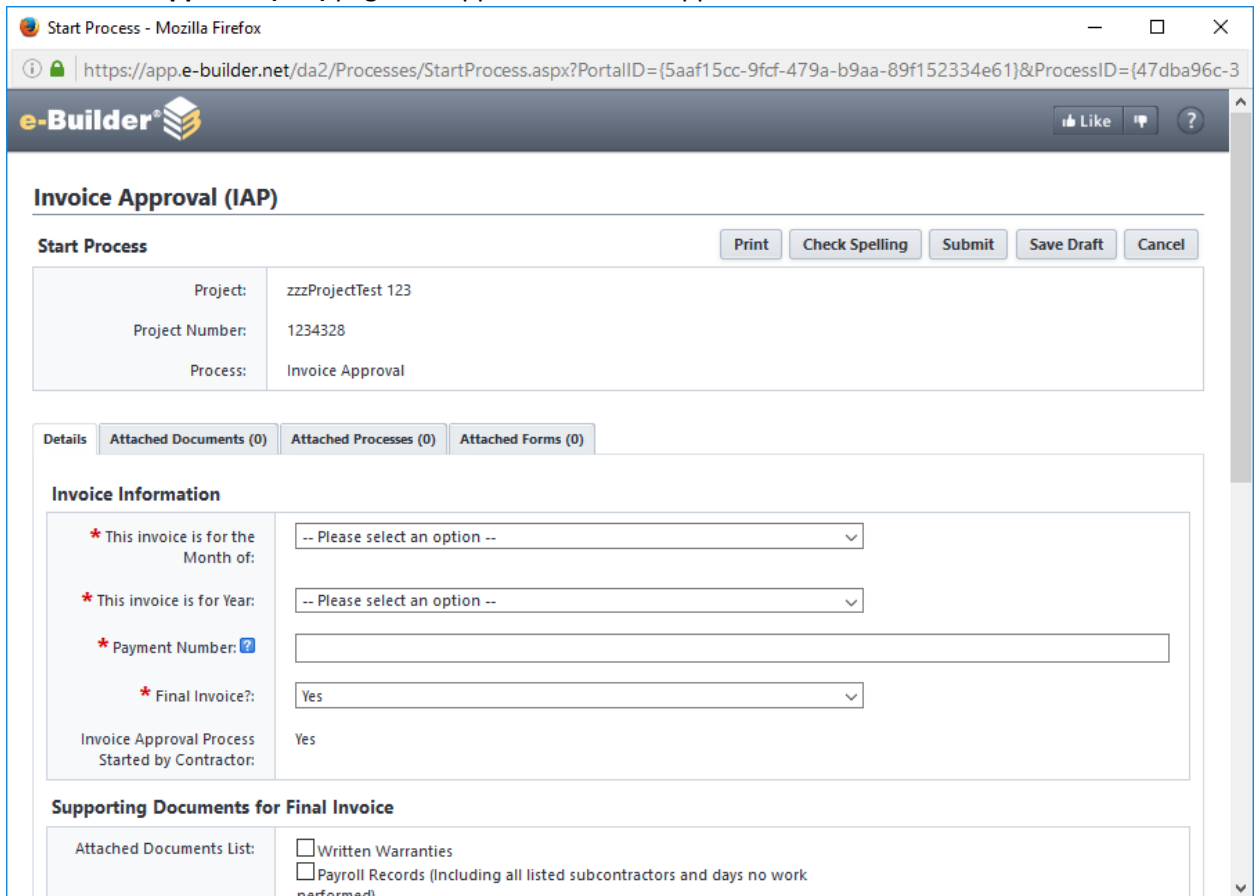
3. The **Processes** page will appear. You can also switch to another project using the drop-down menu next to **Processes for**. Click on the **Start Process** button.



4. The **Select Process** page will appear. Click on **Invoice Approval (IAP)**.



5. The **Invoice Approval (IAP)** page will appear. Fill in the applicable sections.



a. **Invoice Information**

1. **This invoice is for the Month of:** Select from the drop-down menu the month the invoice is being billed for
2. **This invoice is for Year:** Select from the drop-down menu the year the invoice is being billed for
3. **Payment Number:** Input the payment number for this invoice (i.e., 1,2,3, etc.)
4. **Final Invoice?:** Select either **Yes** or **No** to indicate if the current invoice submitted will be the final invoice for the contract.

Supporting Documents for Final Invoice

Attached Documents List:	<input type="checkbox"/> Written Warranties <input type="checkbox"/> Payroll Records (Including all listed subcontractors and days no work performed) <input type="checkbox"/> "As-Built" Drawings <input type="checkbox"/> Release of Claims <input type="checkbox"/> Maintenance Service Contract and Schedule <input type="checkbox"/> Operating and Maintenance Manuals (O&Ms) <input type="checkbox"/> Contractors Daily Reports <input type="checkbox"/> Evidence of Building Permit Closeout <input type="checkbox"/> Certification of Compliance for Final Payment <input type="checkbox"/> Certificate of Vendor Compliance
--------------------------	---

b. **Supporting Documents for Final Invoice**

If the current invoice submitted will be the final invoice for the contract, use the checkboxes to mark the supporting documents that will be attached to the Invoice. Additional documentation may be required at the discretion of the Int CM and/or PMs.

Commitment Invoice Details

Status:	Draft		
* Commitment:	Select a commitment... ▾		
Company/Contact:			
* Date Received:	11.03.2016 [11.03.2016]	Date Due:	
This is a retainage release:	<input type="checkbox"/>		

c. **Commitment Invoice Details**

1. **Status:** The Status is displayed as Draft until submitted
2. **Commitment:** Select from the drop-down menu the Commitment (your contract) that the invoice is being billed against.

University of Hawai'i Construction and Project Management System
Contractor's User Guide (November 10, 2016)

Select a commitment...			
Commitment Number	Company	Description	Current Contract Value
CAP - 00001	zzzTestProject JT Jeff Tagami Inc.	zzzTestProject JT Jeff Tagami Inc.	2,000,000.00
A total of items			

3. **Company/Contact:** The Company/Contact field will be auto-populated when the Commitment is selected.
4. **Date Received:** This field will be pre-filled with the current date
5. **Date Due:** Leave blank. If a date is entered, there is no impact on the invoice process.
6. **This is a retainage release** - If the invoice is requesting a retainage release, check this box.

University of Hawai'i Construction and Project Management System
Contractor's User Guide (November 10, 2016)

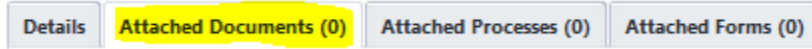
d. Invoice Items

Fill in the information for the amounts being billed. The Contractor will provide information in the yellow highlighted fields in the table.

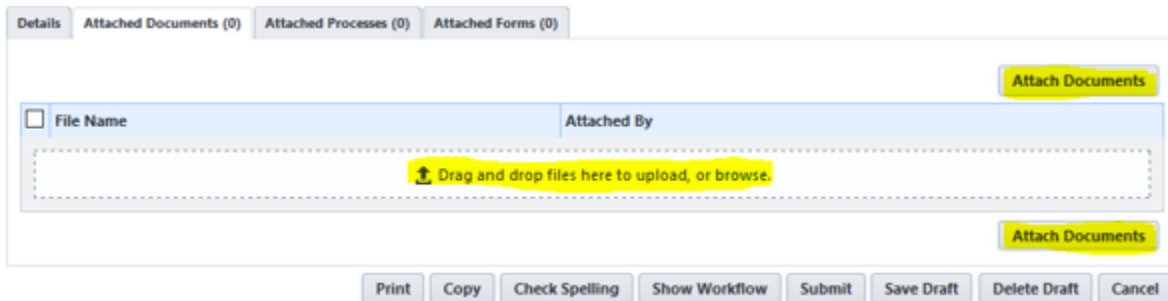
Invoice Items																	Download Schedule of Values Worksheet.xls	Import Invoice Items	Manage Funding
A	B			C	D	E	F			G	H	I	J		K				
Item #	Description of Work	Budget Code with Description	Funding Rule	Scheduled Value	Work in Place From Previous Application(s)	This Period	Total Materials Presently Stored	Current Work Invoiced This Period	Current Payment Due	Total Completed and Stored to Date (D + E + F)	% (G / C)	Balance to Finish (C - G)	Retainage Release Amount	Retained This Period	Amount Less Retainage	Cumulative Retainage			
001	Base Contract - Construction	40,400	Custom	2,000,000.00	0.00	100.00	100.00	200.00	190.00	200.00	0.01 %	1,999,800.00	0.00	10.00	190.00	10.00			
Total				2,000,000.00	0.00	100.00	100.00	200.00	190.00	200.00	0.01 %	1,999,800.00	0.00	10.00	190.00	10.00			

Invoice Item	Description and Comments
A: Item #	Auto-filled: Item # pre-filled from e-Builder
B: Description of Work	Auto-filled: Description of Work auto-filled from Budget Set Up.
Budget Code with Description	Auto-filled: Budget Code with Description auto-filled from Budget Set Up.
Funding Rule	Auto-filled: No action required from Contractor
C: Scheduled Value	Auto-filled: Scheduled Value auto-filled from Commitment Value
D: Work in Place From Previous Application(s)	Auto-filled: Total approved invoice amount from previous pay applications for work in place excluding any previously stored materials
E: This Period	Contractor: Input amount of work invoiced this period
F: Total Materials Presently Stored	Contractor: Input materials stored – materials stored from previous pay applications not used and newly delivered items awaiting payment this period.
Current Work Invoiced This Period	Auto-filled: Current Work Invoiced This Period
Current Payment Due	Auto-filled: Current Work Invoiced This Period + Retainage Release Amount - Retainage
G: Total Completed and Stored to Date (D+E+F)	Auto-filled: Total amount billed to date
H: % (G/C)	Auto-filled: % of contact billed to date
I: Balance to Finish	Auto-filled: Total amount left on Contract
J: Retainage Release Amount	Contractor: Input the Retainage release amount if necessary
Retained This Period	Auto-filled: Invoice amount retained for this period
Amount Less Retainage	Auto-filled: Net invoice amount due for payment for this period
K: Cumulative Retainage	Auto-filled: Cumulative Retainage withheld from invoices

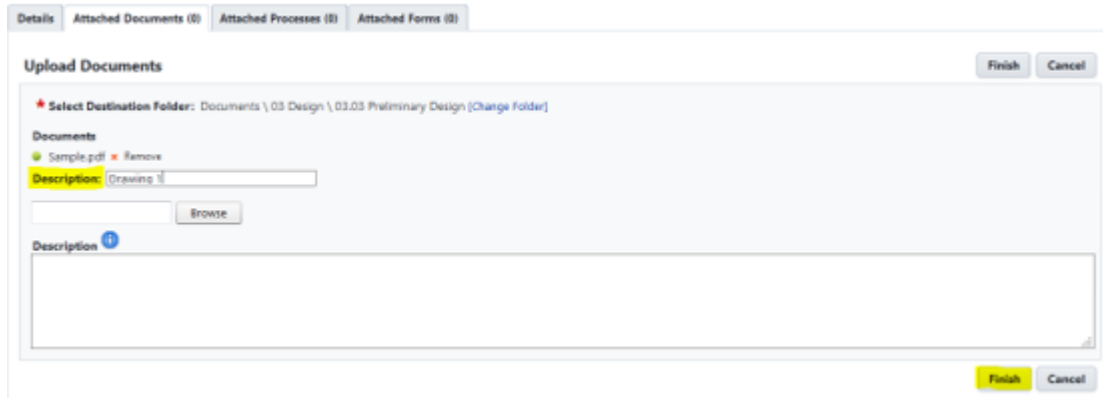
- To attach supporting documentation, click on the **Attach Documents** tab. The schedule of values document is required for every invoice submitted. If the invoice is the final invoice, attach the supporting documents selected in step 5b. Additional documentation may be required at the discretion of Int CMs and/or PMs.



- The **Attached Documents** tab will be displayed. To attach the supporting documentation either open the Windows folder containing the files to drag and drop the files, or click on the either of the **Attach Documents** buttons.



- The following will appear if the files are dragged and dropped. A brief description can be filled in the **Description** field if preferred. To select additional files, click on the **Browse** button and select the files or continue to drag and drop from a Windows folder. Click on the **Finish** button to attach the file(s) to the Invoice submission.



- b. If the **Attach Documents** button is clicked, the **Attach Documents** page will appear. Click on the **Browse** button to select a file to be uploaded. A brief description can be filled in the **Description** field if preferred. Click on the **Attach Selected** button once all of the files are selected.

Attach Documents - Mozilla Firefox
https://app.e-builder.net/da2/Documents/AttachDocuments.aspx?QS=AdKzw4sP/5uOXSViXMAabNaal

e-Builder Like ?

Attach Documents from zzzProjectTest 123

Project: zzzProjectTest 123
Process: Design Review

1) Select Attachment Method
 Upload and attach file(s) from your computer
 Attach files from the e-Builder Document module for the zzzProjectTest 123 project

2) Select Files to Upload from Your Computer

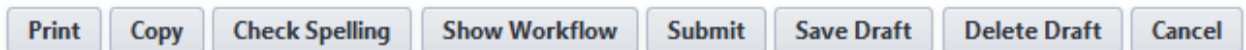
File 1
Select a File: [Browse...]
Description: [Text Area]

File 2 (optional)
Select a File: [Browse...]
Description: [Text Area]

3) Select an e-Builder Destination Folder
* Destination Folder: 03.03 Preliminary Design [Browse]

[Attach Selected] [Cancel]

8. After filling in all relevant information, select one of the actions at the bottom of the screen.

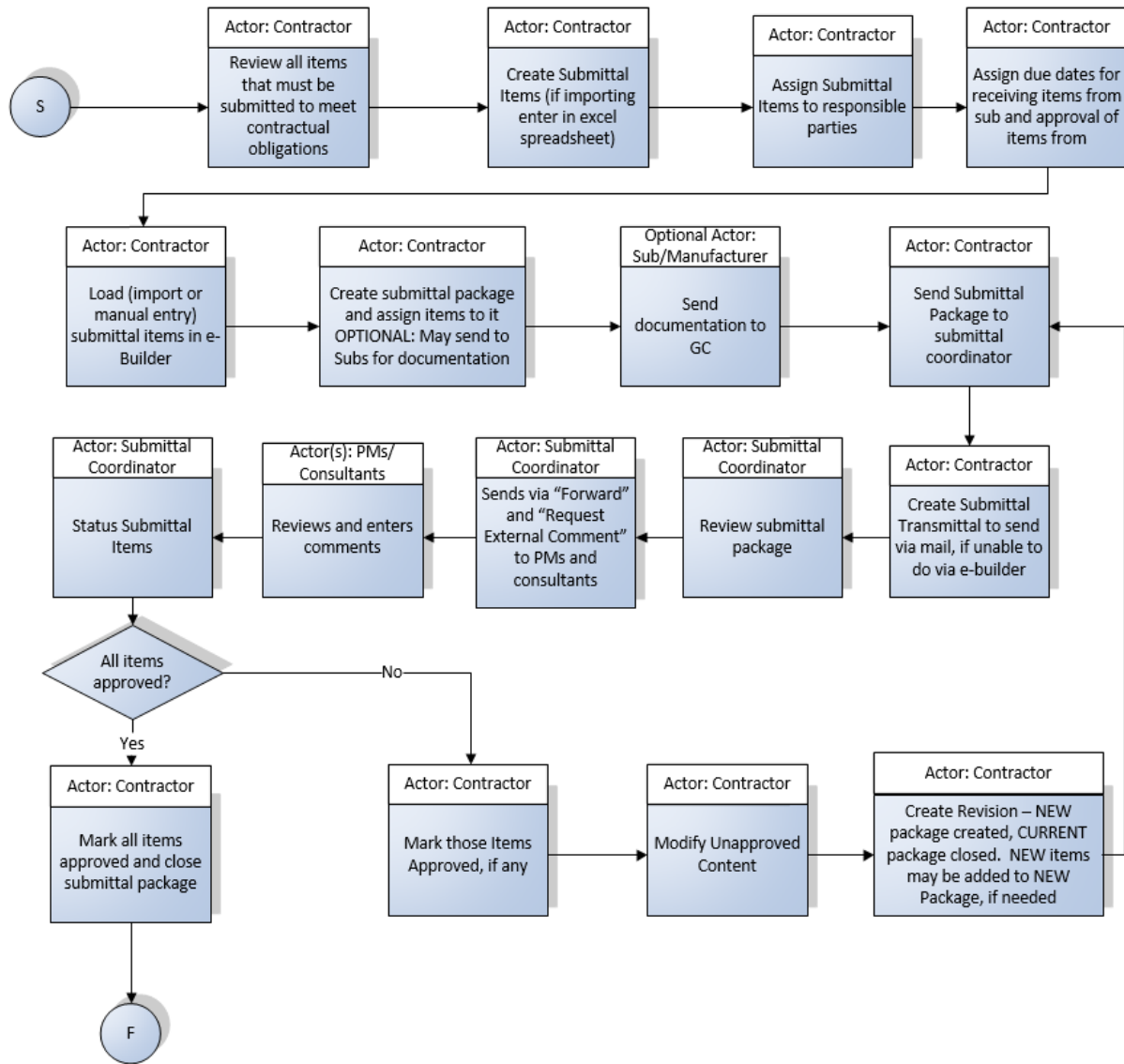


- a. **Print** button to print **this page**
- b. **Copy** button to make a copy
- c. **Check Spelling** button to perform a spell check in all text fields.
- d. **Show Workflow** button to view the workflow process of the invoice.
- e. **Submit** button to forward the Invoice to the Int CM (or Ext CM if applicable) for review.
- f. **Save Draft** button to save your work and complete it at a later time.
- g. **Delete Draft** button to delete the draft.
- h. **Cancel** button to exit and close the window. (All changes made to previously saved versions and work performed on initial drafts will not be saved.)

5.0 SUBMITTALS

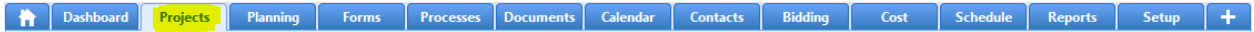
Submittals in construction management are shop drawings, material data, samples and product data. Submittals are primarily required to verify that the correct products and quantities will be installed on the project.

5.1 Submittal Workflow



5.2 Accessing the Submittal Module

1. Go to the **Projects** tab.



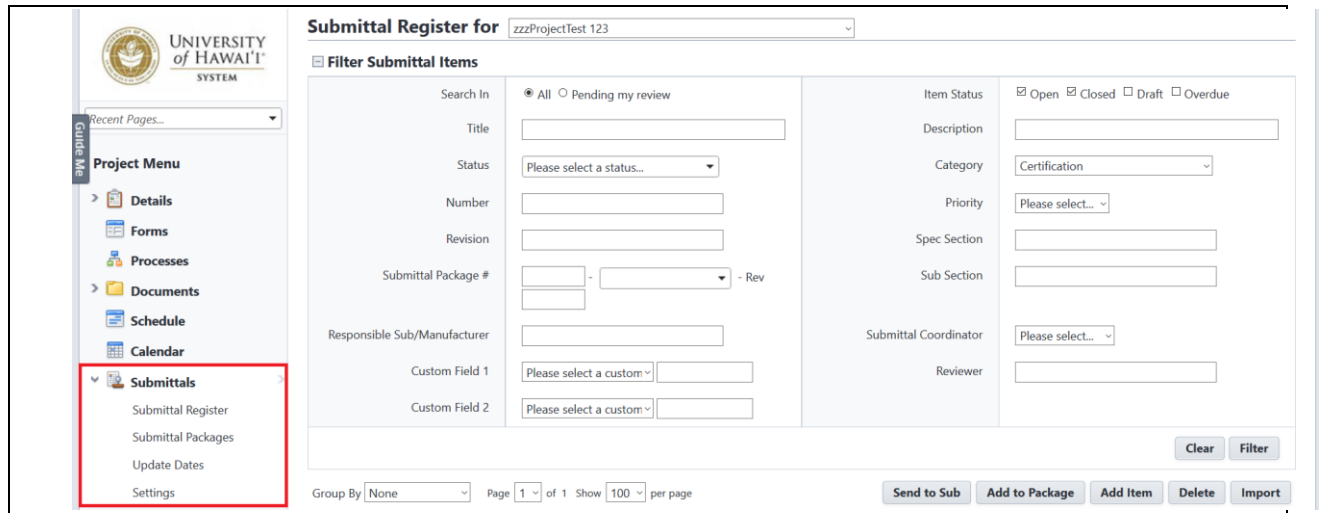
2. Click on the project that you would like to access with the Submittal Module.

Projects

All Projects Edit | Add View All Projects

Project Name	City	State / Province	Site Administrator	Project ID
Edit zzzProjectTest 123			Implementation, e-Builder	1234328
Edit zzzTestProject			Implementation, e-Builder	100001
Edit zzzTestProjectT			Implementation, e-Builder	1234323

3. On the left side, under Project Menu, click the **Submittals** link.



The screenshot shows the 'Submittal Register for zzzProjectTest 123' interface. On the left, the 'Project Menu' is visible with 'Submittals' highlighted in a red box. The main area contains a 'Filter Submittal Items' section with various search and filter options. At the bottom, there are buttons for 'Send to Sub', 'Add to Package', 'Add Item', 'Delete', and 'Import'.

Submittal Register for zzzProjectTest 123

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Clear Filter

Group By: None Page 1 of 1 Show 100 per page

Send to Sub Add to Package Add Item Delete Import

5.3 Creating the Submittal Registry

Contractors will create a log of items to be submitted for a project. This log can be created in Excel and imported into e-Builder or the items can be entered into the system individually. Both options are explained below.

5.3.1 Importing the Registry

The import template will be provided to you upon request or may be downloaded by following the link below:

<http://tinyurl.com/zley67o>

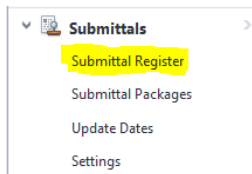
The submittal register is imported into e-Builder by the General Contractor (GC). While items may be added individually, an Excel import allows you to save time by importing items in bulk. The import file must have a defined header row for a successful import. Please note that the Category and Priority columns are restricted to a small number of defined values. Category must be identified as one of the following:

- Certification
- Mock Up
- Operation / Maintenance Manual
- Product Data
- Record Documents
- Sample
- Shop Drawing
- Test Report
- Warranties and Guarantees

If used, Priority must be identified as one of the following:

- Low
- Normal
- High

Select **Submittal Register**:



1. Click on the **Import** button on the right side of the screen.



- The **Choose your Import File** screen will appear. Click on the **Choose File** button and select your submittal log file by locating your file on your computer.
- Once you select the file, click on the **Next** button.

Import Submittal Register for zzzProjectTest 123 - Select Import File

Step 1 of 3

Choose your Import File

* Import File: Submittal Register Import Template.xlsx

Note: Please select a .xls or .xlsx file to import.

- The **Submittal Item Built-In Fields** screen will appear. This screen shows the mapping between your Excel import file's columns and the fields in "e-Builder." After confirming the file is mapped accordingly, click on either of the **Next** buttons.

Import Submittal Register for zzzProjectTest 123 - Field Mappings

Step 2 of 3

Submittal Item Built-In Fields

* Title:	<input type="text" value="Title"/>	* Category:	<input type="text" value="Category"/>
Description:	<input type="text" value="Description"/>	Priority:	<input type="text" value="Priority"/>
Package Number:	<input type="text"/>	Package Name:	<input type="text"/>
Spec Section:	<input type="text" value="Spec Section"/>	Sub Section:	<input type="text" value="Sub Section"/>
Responsible Manufacturer/Sub-Contractor:	<input type="text" value="Responsible Manufacturer/Sub-Contractor"/>	Commitment:	<input type="text"/>
Date Due From Sub:	<input type="text" value="Date Due From Sub"/>	Date Received From Sub:	<input type="text" value="Date Received From Sub"/>
Date Due Submit For Review:	<input type="text" value="Date Due Submit For Review"/>	Date Due Review Complete:	<input type="text" value="Date Due Review Complete"/>
Date Due Return:	<input type="text" value="Date Due Return"/>	Date Returned:	<input type="text" value="Date Returned"/>
Date Due Delivery:	<input type="text" value="Date Due Delivery"/>	Date Delivered:	<input type="text" value="Date Delivered"/>

You do not have permissions to view cost data for this project

Submittal Item Custom Fields

There are no submittal item custom fields.

5. Preview the Import. This screen allows you to preview the first line to be imported to ensure the fields are mapped correctly. If any rows are not imported due to invalid data, they are listed in the exceptions tab. If all rows are imported correctly, click on either of the **Import** buttons.

Import Submittal Register for zzzProjectTest 123 - Review

Step 3 of 3

Import File Summary Previous **Import** Cancel

File Name:	Submittal Register Import Template.xlsx	Rows In File:	5
Rows To Be Imported:	5	Rows With Exceptions:	0

Preview (Row 2) **Exceptions (0)**

Submittal Item Built-In Fields

Title:	Pipe	Category:	Certification
Description:	Test	Priority:	Low
Package Number:		Package Name:	
Spec Section:		Sub Section:	1
Responsible Sub/Manufacturer:	Test	Commitment:	
Date Due From Sub:	11.09.2016	Date Received From Sub:	11.09.2016
Date Due Submit For Review:	11.09.2016	Date Due Review Complete:	11.09.2016
Date Due Return:	11.09.2016	Date Returned:	11.09.2016
Date Due Delivery:	11.09.2016	Date Delivered:	11.09.2016

Submittal Item Custom Fields

There are no submittal item custom fields.

Previous **Import** Cancel

6. A message stating "Submittal register has been successfully imported" will display. Click on the **Finish** button.

Import Submittal Register for zzzProjectTest 123

Submittal register has been successfully imported.

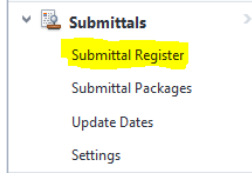
Finish

Note: If there are any exceptions, you should cancel the import, correct the exceptions in the file and then re-import the file.

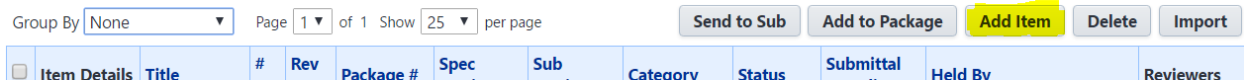
5.3.2 Adding Items Individually

Instead of importing your submittal register, you may add submittal items one at a time. Perform the following steps to add submittal items individually.

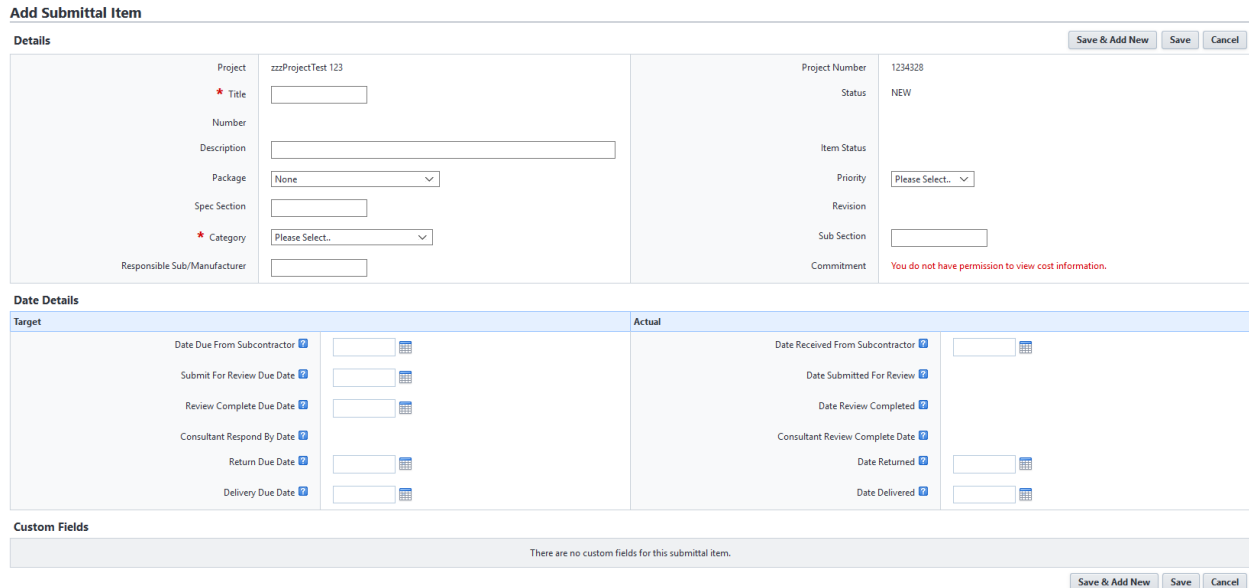
From the **Submittal Register** page:



1. Click on the Add Items button on the right side.



2. Enter the submittal item's information.

A screenshot of the 'Add Submittal Item' form. The form is titled 'Add Submittal Item' and has a 'Details' section. The 'Details' section is divided into two columns. The left column contains fields for: Project (zzzProjectTest 123), Title (required, empty), Number, Description, Package (None), Spec Section, Category (required, Please Select...), and Responsible Sub/Manufacturer. The right column contains fields for: Project Number (1234328), Status (NEW), Item Status, Priority (Please Select...), Revision, Sub Section, and Commitment (You do not have permission to view cost information.). Below the 'Details' section is a 'Date Details' section with two columns: 'Target' and 'Actual'. Each column has several date fields with calendar icons: Date Due From Subcontractor, Submit For Review Due Date, Review Complete Due Date, Consultant Respond By Date, Return Due Date, Delivery Due Date, Date Received From Subcontractor, Date Submitted For Review, Date Review Completed, Consultant Review Complete Date, Date Returned, and Date Delivered. At the bottom is a 'Custom Fields' section with the message 'There are no custom fields for this submittal item.' and 'Save & Add New', 'Save', and 'Cancel' buttons.

- Title** - enter the title of the submittal item.
- Description** - enter a description of the item.
- Package** - select a submittal package from the drop-down menu.
- Spec Section** - enter the specification section in this field. In many cases this will be the CSI code used on the submittal item.
- Category** - select the category from the drop-down menu that the submittal item belongs to. Choose from the following selections:

- Certification
- Mock Up
- Operation / Maintenance Manual
- Product Data
- Record Documents
- Sample

- Shop Drawing
 - Test Report
 - Warranties and Guarantees
- f. **Responsible Sub/Manufacturer** - enter the name of the subcontractor or manufacturer responsible for completing the work for this submittal item.
- g. **Priority** - select from the drop-down menu from the following selections.
- Low
 - Normal (Default)
 - High
- h. **Sub Section** - enter the sub section in this field. In many cases this will be the sub section CSI code used on the submittal item.
- i. **Date Due From Subcontractor** - enter the date that the submittal item content needs to be submitted back to the general contractor from the subcontractor.
- j. **Submit For Review Due Date** - enter the date that the general contractor needs to send the item for review.
- k. **Review Complete Due Date** - enter the date that the submittal coordinator needs to complete their review of the items and sent back to the general contractor.
- l. **Return Due Date** - enter the date that the contractor needs to return the item to the responsible part after it has been returned from the submittal coordinator.
- m. **Delivery Due Date** - enter the date the item needs to be delivered to the facility or final destination, after it has been approved.
- n. **Date Received From Subcontractor** - enter the actual date that the item was received from the subcontractor. This date will update automatically when the item is received from the subcontractor.
- o. **Date Returned** - enter the actual date that the item was sent to the responsible party, after the submittal coordinator's approval.
- p. **Date Delivered** - enter the actual date that the item was delivered to its destination.
3. Click **Save** or **Save & Add New** if additional items need to be added.

Custom Fields

There are no custom fields for this submittal item.

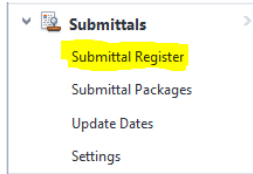
Save & Add New Save Cancel

5.4. (Optional) Sending to Subcontractor

In preparation for sending the item to the Submittal Coordinator, the GC has the ability to send the individual item to Subcontractors and attach the documentation to be submitted or the Contractor can upload the documentation and attach it to the item.

Sending the item to the Subcontractor (Sub) will place their name in the Held By field and give them access to uploaded the documents to the item. The Sub does not need to be an e-Builder User to update the item.

From the **Submittal Register** screen:



1. Select the item(s) that you want to send to a Sub by checking the boxes in the left column.
2. Click on the **Send to Sub** button.

Group By: None Page: 1 of 1 Show: 25 per page 7 item(s) selected												
Send to Sub Add to Package Add Item Delete Import												
<input checked="" type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		Schedule of Values	1	0				Record Documents	NEW			
<input checked="" type="checkbox"/>		LEED Specific - Concrete Materials	2	0				Product Data	NEW			
<input checked="" type="checkbox"/>		LEED Specific - Concrete Materials	3	0				Product Data	NEW			
<input checked="" type="checkbox"/>		Indoor Air Quality Management	4	0				Record Documents	NEW			
<input checked="" type="checkbox"/>		Indoor Air Quality Management	5	0				Record Documents	NEW			
<input checked="" type="checkbox"/>		Temp Fence Data and Shop Drawings	6	0				Shop Drawing	NEW			
<input checked="" type="checkbox"/>		Construction Waste	7	0				Record Documents	NEW			

3. The **Send Items to Sub** screen will open. Fill in the applicable sections.

Send Items to Sub

Send to Sub Cancel

Project: zzzProjectTest 123
Project Number: 1234328

* Send To: --Select a Role (Optional)--
--Select Recipient--

or Enter One External User (email)

Lookup

Send Type: Action Required [?](#)
 Notify Only [?](#)

* Respond By: [Calendar icon]

CC Roles: Auditor, eB Admin, eB Project Admin, EXT - Construction Manager, EXT - Consultant, EXT - Contractor, Members, UH - Client/Owner, UH - Construction Manager, UH - Construction Manager Supervisor

CC Users: Kwan extCM, Kevin (Z_Test Company CM), Kwan extConsultant, Kevin (Z_Test Com), Kwan extContractor, Kevin (Z_Test Comp), Kwan IntCM, Kevin (University of Hawaii), Kwan PM, Kevin (University of Hawaii), Tagami Ext CM, Jeff (University of Hawai), Tagami Ext Consultant, Jeff (University o), Tagami Int CM, Jeff (University of Hawai), Tagami PM, Jeff (University of Hawai'i)

CC External Users Via Email: [Text input]
Lookup

** Select folder for external user to attach files

Message: [Text input]

- a. **Send to** section – if the Sub is an e-Builder user, you will be able to search for a name in the **Select Recipients** drop-down menu, to narrow down the recipients you can also use the **Select a Role (Optional)** drop-down menu. If they are not an e-Builder user, you can type an email address in the **Enter One External User (email)** field.

- b. **Send Type** field – select the **Action Required** radio button to indicate to the recipient that an action is required of them. Select the **Notify** radio button to indicate to the recipient that they are only being notified, but no action is required of them.

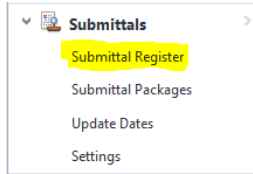
- c. **Respond by** field – providing a date will give the recipient a response date if an action is required.
- d. **CC Roles** and **CC Users** section – select the e-Builder users you would like to copy. You can select user roles or individual users. Click the blue arrow pointed to the right to add their names to the adjacent box. Repeat this step for all users you want to copy.

- e. **CC External Users Via Email** field – enter the email address of the external user you would like to copy.
- f. **Select folder for external user to attach files** – if an external user is selected, a folder for the external user to save attached files must be selected. Click this link to display the e-Builder Documents folder. Make a folder selection.
- g. **Message** field – enter a message to accompany the submittal item(s).
- h. **Selected submittal items** – this section lists the items that are being sent to the subcontractor.
4. Click on the **Send to Sub** button.

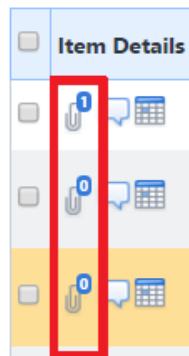
5.5 Attaching Documents

If the Contractor has the documents to be submitted to the submittal coordinator, they have the ability to attach the documents.

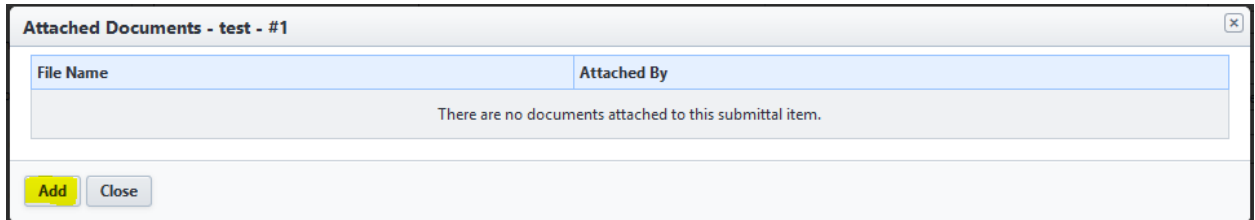
From the **Submittal Register** screen:



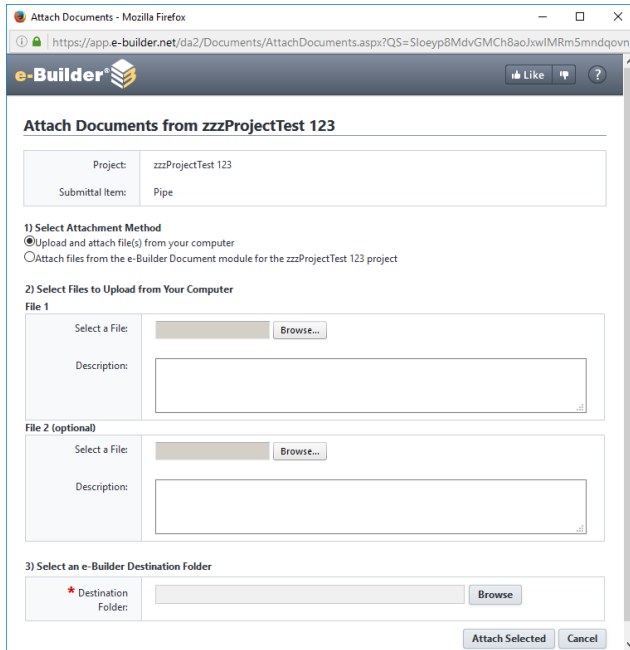
1. Select the item that the document is to be attached to by clicking on the paper clip icon of the corresponding line item.



2. Click on the **Add** button.

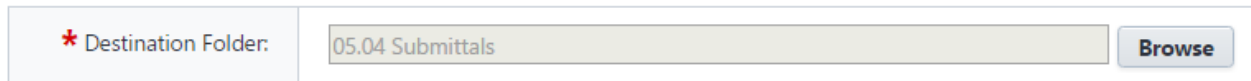


- An **Attach Documents** screen will open. Select the radio button to either **Upload and attach file(s) from your computer** or **Attach from the "e-Builder Document module for the (Project)**.



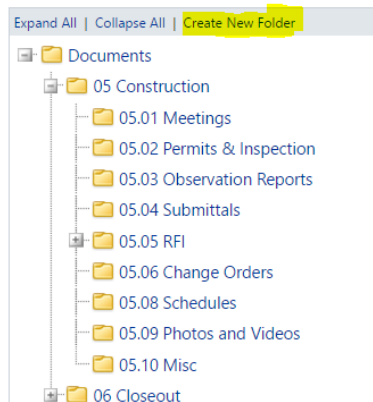
- You can simply drag and drop documents from your local directory into the **Select a File** field or select using the **Browse** button.
 - If selecting a file from e-Builder, select **Attach from the e-Builder Document module for the (Project)** and select the file from the e-Builder document folders.
- You will need to set a destination folder. Please select the **05.04 Submittals** folder. The documents will reside in this folder after completing the attachment process.

3) Select an e-Builder Destination Folder



- Click the **Attach Selected** button.

Note: You may create new subfolders within the submittals folder by clicking **Create New Folder** link.

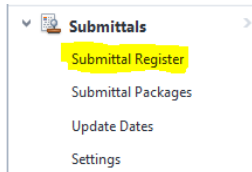


5.6 Submitting the Package

5.6.1 Creating a Submittal Package










A submittal package gives the Contractor the ability to group several submittal items together to submit to the Submittal Coordinator (Coordinator) (ex. UH Project Manager or UH Construction Manager). If one item needs a response faster than the other items, it is recommended to send that item in its own package. The coordinator must review all items before submitting the package back to the Contractor.

From the **Submittal Register** screen:

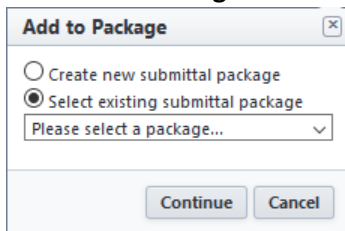


1. Select the items that you are packaging together by using the checkboxes in the left column.
2. Click the **Add to Package** button.

Group By: None Page: 3 of 16 Show: 25 per page 23 item(s) selected Send to Sub Add to Package Add Item Delete Import

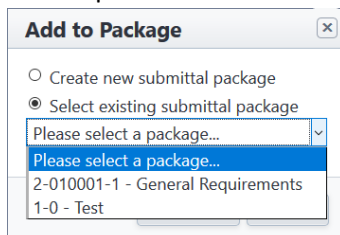
<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	  	Exposed Limestone Unit Sample(s)	60	0				Mock Up	NEW			
<input checked="" type="checkbox"/>	  	Moisture/Water Repellent(s)	61	0				Product Data	NEW			
<input type="checkbox"/>	  	Brick Product Data	62	0				Mock Up	NEW			

3. A small window will appear. Select from either the **Create a new submittal package** radio button or the **Select existing submittal package** button, and click **Continue**.



The 'Add to Package' dialog box has two radio buttons: 'Create new submittal package' (unselected) and 'Select existing submittal package' (selected). Below the radio buttons is a dropdown menu with the text 'Please select a package...'. At the bottom are 'Continue' and 'Cancel' buttons.

- a. If **Select existing submittal package** is used, choose a submittal package created previously from the drop-down menu.



The 'Add to Package' dialog box is shown with the dropdown menu open. The menu items are: 'Please select a package...', 'Please select a package...' (highlighted in blue), '2-010001-1 - General Requirements', and '1-0 - Test'.

- b. If **Create a new submittal package** is selected, the **Create Submittal Package** screen will open. Fill in the applicable fields.

Create Submittal Package

Save Cancel

Details

Project	zzzProjectTest 123
Project Number	1234328
Submittal Package #	3 - <input style="width: 80px;" type="text"/> - 0
* Submittal Package Name	<input style="width: 95%;" type="text"/>
Description	<input style="width: 95%;" type="text"/>
Trade	<input style="width: 95%;" type="text"/>

Custom Fields

There are no custom fields for this submittal package.

Page of 1 Show per page

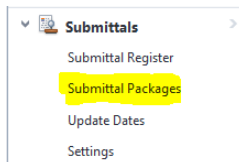
Title	#	Rev #	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/> Pipe	395			1	Certification	NEW
<input checked="" type="checkbox"/> Walls	396			1	Certification	NEW
<input checked="" type="checkbox"/> Electric	397			1	Certification	NEW
<input checked="" type="checkbox"/> Tape	398			1	Certification	NEW
<input checked="" type="checkbox"/> Cement	399			1	Certification	NEW
<input checked="" type="checkbox"/> Pipe	400			Test	Certification	NEW
<input checked="" type="checkbox"/> Walls	401			Test	Certification	NEW

- i. **Submittal Package #** – enter the submittal package number.
- ii. **Submittal Package Name**, enter a name for the package.
- iii. **Description**, enter a description of the package.
- iv. **Trade**–, enter the trade for which the items in the package will be associated with.
- v. Click the **Save** – button.

5.6.2 Sending the Package for Review

Sending the package for review places the package in the coordinator's court and requests a response by a specific date.

From the **Submittal Package** screen:



1. Select the packages that you are sending for review by using the checkboxes in the left column.

*University of Hawai'i Construction and Project Management System
Contractor's User Guide (November 10, 2016)*

2. Click the **Send for Review** button.

Page 1 of 1 Show 10 per page Create Package **Send for Review**

<input type="checkbox"/>	Title	Description	Package #	Revision Number	Trade	Status	Created By	Date Created	Date Close
<input checked="" type="checkbox"/>	Shop Drawings		3-02221-0	0		Draft	Kevin Kwan extContractor	11.04.2016	

3. The **Send for Review** screen will open. Fill in the applicable sections.

Send for Review Cancel

*** Submittal Coordinators**

*** Review Complete Due Date**

CC Roles

EXT - Construction Manager
 EXT - Consultant
 EXT - Contractor
 UH - Construction Manager
 UH - PM Supervisor
 UH - Project Manager

CC Users

Kwan extCM, Kevin (Z_Test Company CM)
 Kwan extConsultant, Kevin (Z_Test Compan
 Kwan extContractor, Kevin (Z_Test Compan
 Kwan IntCM, Kevin (University of Hawaii)
 Kwan PM, Kevin (University of Hawaii)
 Tagami Ext CM, Jeff (University of Hawaii)
 Tagami Ext Consultant, Jeff (University of H
 Tagami Int CM, Jeff (University of Hawaii)
 Tagami PM, Jeff (University of Hawaii)

CC External Users Via Email

**** Select folder for external user to attach files**

[\[Select folder\]](#)

Message

Send for Review Cancel

Selected submittal items

Title	#	Package	Status
F&W Temporary Shoring w/Calcs	6	1-0	NEW

Send for Review Cancel

- a. **Submittal Coordinators** – select from the drop-down list the Coordinator's Name.
- b. **Review Complete Due Date** – click the calendar icon to select a due date for the submittal package.
- c. **CC Roles** and **CC Users** section – select the e-Builder users you would like to copy. You can select user roles or individual users. Click the blue arrow pointed to the right to add their names to the adjacent box. Repeat this step for all users you want to copy.
- d. **CC External Users Via Email** – enter the email address of the external user you would like to copy.
- e. **Select folder for external user to attach files** – if an external user is selected, a folder for the external user to save attached files must be selected. Click this link. The e-Builder Documents folder structure displays. Make a folder selection.
- f. **Message** – enter a message to accompany the submittal package(s).
- g. Click the **Send for Review** button.

5.7 Completing the Package

After the submittal package has been reviewed by the coordinator, the coordinator will provide one of the following status options for each submittal item.

- Make Corrections Noted
- No Exceptions Taken
- Rejected
- Revise & Resubmit

The submittal package will then land back into the Contractor's court. To access the submittals, perform the following procedures.

- 1a. Once a submittal has been reviewed by the coordinator, the Contractor will receive an email notification requesting the Contractor's action. Open the email and click on **click here** to access the e-Builder site and have the document opened.

zzzProjectTest 123

The following submittal item(s) have been returned to you. To review these submittal item(s), [click here](#).

Title	#	Rev #	Status	Category	Package #	Priority	Date Due
Tape	398	0	No Exception Taken	Certification	3-0	Normal	11.10.2016
Cement	399	0	No Exception Taken	Certification	3-0	Normal	11.10.2016

e-Builder Technical Support
phone: 1-888-288-5717 fax: 1-888-576-9322
support@e-builder.net

- 1b. You can also access the submittal module by logging into e-Builder and accessing it through the **Submittal items in your court** section toward the middle of the Home screen and clicking on the Project Name to access the submittal module or clicking on the Name of the document (ex. RFI-2) to open the submittal item.

Jeff Tagami Ext Contractor All Projects

Workflow in your court Show First ten

Project	Name	Subject	Step	Date Due [▲]	Requested Comment
zzzProjectTest 123	RFI - 1	University of Hawai'i - Unforeseen Condition	Initiator Revise		

Forms | Processes

My first 10 tasks Show First ten

Project	Task	FinishDate [▲]	%	Manager
There are no tasks				

Tasks

Submittal items in your court Filter by Actions All in my court Show First ten

Project	Title	#	Rev #	Package #	Status	Due Date [▲]	Held By
zzzProjectTest 123	Cement	399	1	3-1	No Exception Taken		Jeff Tagami Ext Contractor
zzzProjectTest 123	Tape	398	2	3-2	NEW		Jeff Tagami Ext Contractor

Items Pending Approval Show First ten

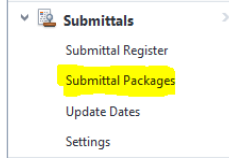
Project	Item Type	Item #	Approval Requested By	Date Approval Requested [▲]	Amount
There are no items pending approval for the selection.					

See More Items Pending Approval

5.7.1 Revise and Resubmit

If the status of an item is Revise and Resubmit, the Contractor must create a revision to the package to resubmit the requested items.

From the **Submittal Packages** screen:



1. Click on the **Title** or the **Package #** to open the package to be revised and resubmitted.

Submittal items in your court Filter by Actions: All in my court Show: First ten

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
zzzTestProjectJT	Exposed Limestone Unit Sample(s)	60	0	3-02221-0	Make Corrections Noted		Kevin Kwan extContractor

2. Revise the submittal item(s) as needed.
3. Select the item(s) that have been revised and are to be resubmitted using the boxes in the left column.
4. Click the **Create Revision** button.

Group By: Page: 1 of 3 Show: 10 per page 1 item(s) selected

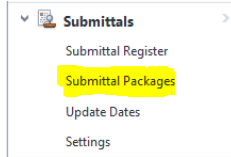
<input checked="" type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		Exposed Limestone Unit	60	0			Mock Up	MCN		Kevin Kwan extContractor	

5. Click **Save** to save the Revision package.
6. The submittal process must be restarted with the revised package. The submittal(s) from the revised package will need to be sent to the coordinator for review. See [5.6.2 Sending the Package for Review](#).

5.7.2 Closing Items/Package

If the submittal items have been reviewed by the coordinator and no revision is needed, the Contractor can close the item. The Contractor should create revisions for all items that need to be revised before closing out the completed items.

From the **Submittal Packages** screen:



1. Click on the **Title** or the **Package #** to open the package to be revised and resubmitted.

Submittal items in your court Filter by Actions: All in my court ▼ Show: First ten ▼

Project	Title	#	Rev #	Package #	Status	Due Date^	Held By
zzzTestProjectJT	Exposed Limestone Unit Sample(s)	60	0	3-02221-0	Make Corrections Noted		Kevin Kwan extContractor

2. The **Submittal Package Details** screen will open. Click the **Close** button.

Submittal Package Details

Submittal Package Overview History

Request Comment
Update Dates
Generate Transmittal
Close
Edit

Project	zzzProjectTest 123	Project Number	1234328
Title	Test	Status	Open
Description	Test	Trade	General Data
Submittal Package #	1-01000-0	Created By	Tagami Ext Contractor, Jeff
Date Created	11.04.2016 4:55 PM	Baseline Finish Range	11.25.2016 - 11.30.2016
Items Held By	Jeff Tagami Ext Contractor, Jeff Tagami PM		
Baseline Start Range	11.09.2009 - 11.09.2016		

Items (3)
Documents (0)
Comments (0)
Custom Fields (0)
Revisions (0)

Group By: None Page: 1 of 1
Show: 10 per page
3 item(s) selected

Send for Review
Send to Sub
Create Revision
Remove Items

<input type="checkbox"/>	Item Details	Title	# ▲	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
--------------------------	--------------	-------	-----	-------	--------------	-------------	----------	--------	-----------------------	---------	-----------

3. If any of the submittal items require revision, there will be a notification on the confirmation page. Select **Continue** on the confirmation page to close the submittal items in the package.

GLOSSARY

CO:	Change Order
COCOP:	Contractor Change Order Proposal
Consultant:	External Consultants used for review purposes
Coordinator:	Submittal Coordinator, UH employee who provides status of submittals
e-Builder:	Construction and Project Management Solution used by UH
Ext CM:	External Construction Manager
Filters:	Items used to narrow down search terms for processes
Home Module:	Centralized place where users can see upcoming items pertinent to them
IAP:	Invoice Approval Process
Int CM:	University of Hawai'i Construction Manager
Modules Menu:	Tabs at the top of the e-Builder screen used for navigation
PM:	University of Hawai'i Project Manager
Processes Module:	Menu tab where users initiate and track processes
Project Menu:	Left sidebar of the e-Builder screen used for navigation within a project
Project Module:	Menu tab that provides general project information
RFI:	Request For Information
Workflows:	Processes which facilitate work between different project participants from initiation to completion