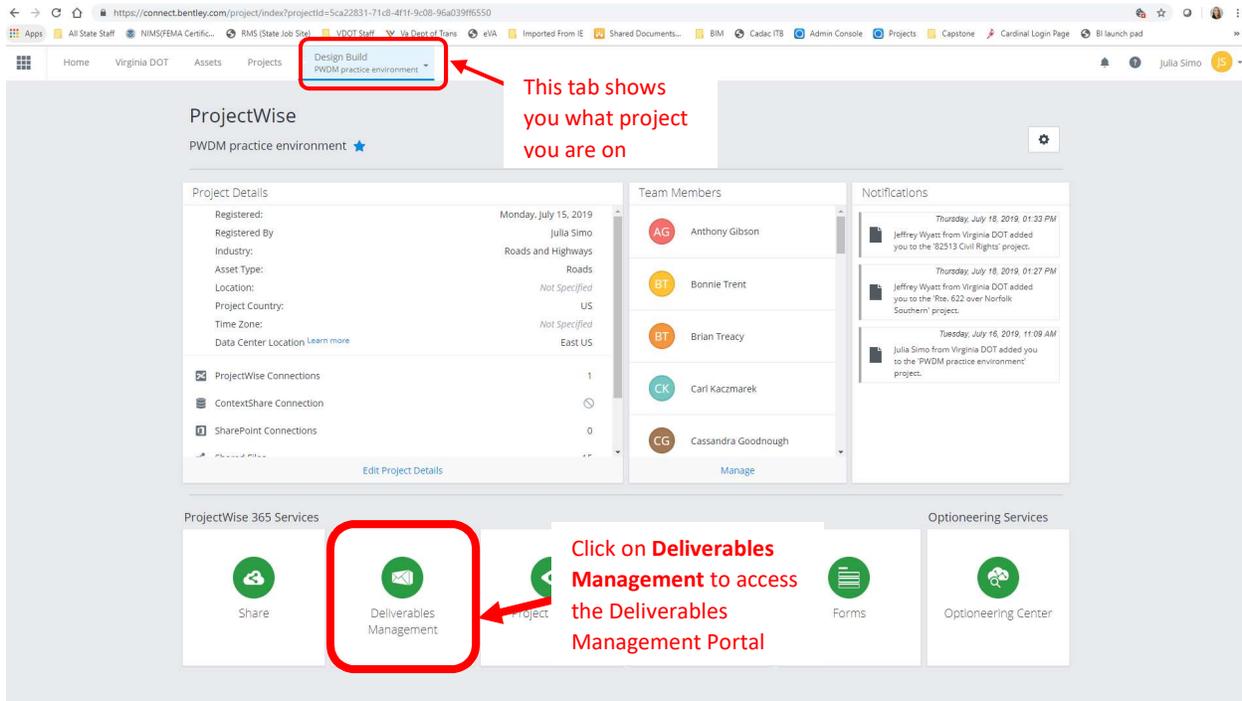


Creating a New Submittal / Transmittal with Deliverables Management

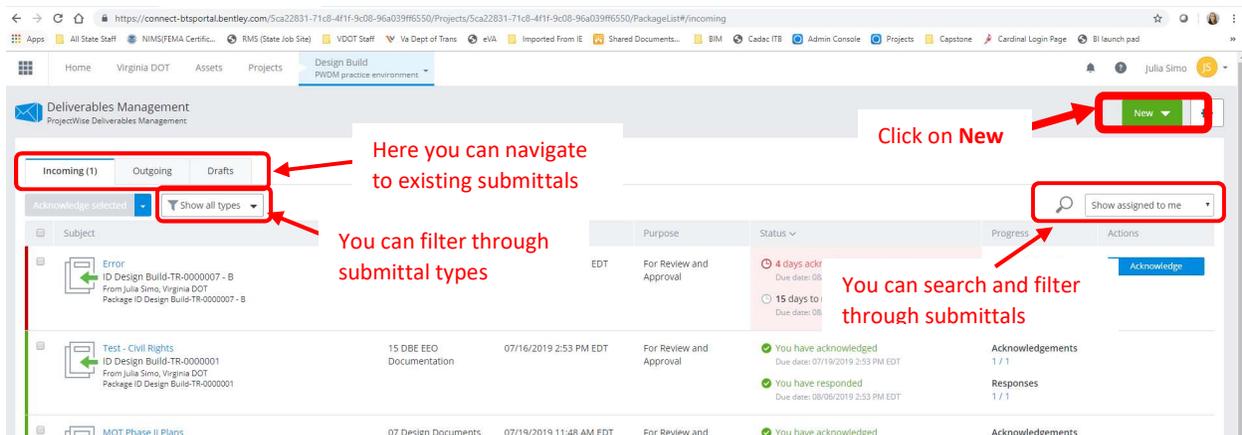


Step 1: From the Project Portal/ CONNECT Center; navigate to the Deliverables Management Portal:



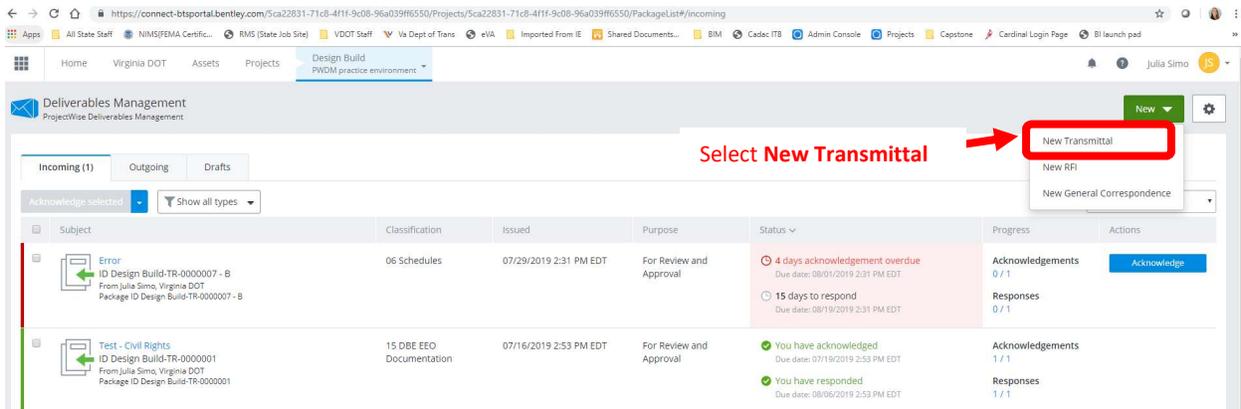
Note: For more information about accessing the Project Portal, see a different job aid.

Step 2: On the Deliverables Management Portal, to create a NEW AND OFFICIAL SUBMITTAL:



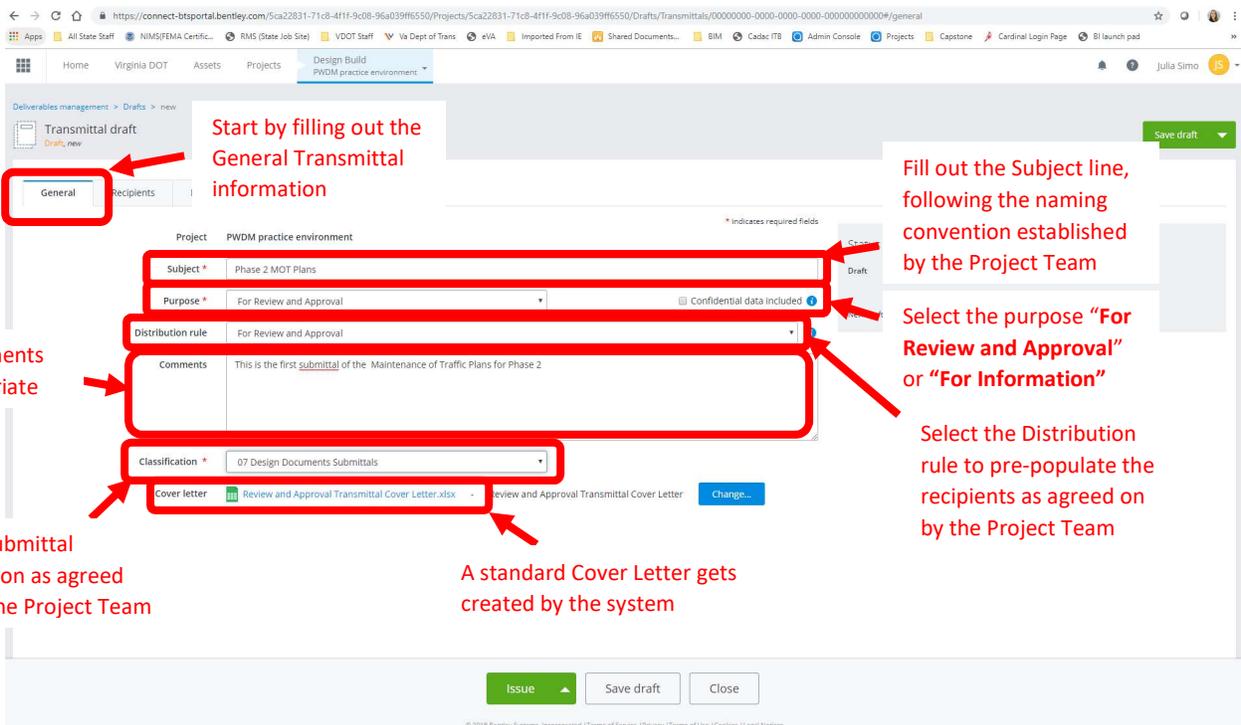
Creating a New Submittal / Transmittal with Deliverables Management

Step 3: Select New Transmittal



Note: If you want to create a New RFI or General Correspondence see a different job aid.

Step 4: Follow the next steps to create an official submittal



Creating a New Submittal / Transmittal with Deliverables Management

The recipients tab is automatically populated based on the distribution rule that was agreed upon by the Project team

If you need to add additional recipients click on "Add..."

Recipient	Ack	Resp	Comments	Company	Title
Jeremy Kitto jeremy.kitto@vdot.virginia.gov	<input type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Project Administrator
Jeffrey Wyatt jff.wyatt@vdot.virginia.gov	<input type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Team Member
Julia Simo julia.simo@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Project Manager
Dakota Clifford dakota.clifford@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Custom

The checked boxes indicate who is required to "Acknowledge" and "Respond"

To add recipients you can search and filter through the project team

Creating a New Submittal / Transmittal with Deliverables Management

Add Documents through the Documents tab

Click on "Add files..." You can add multiple documents at once

Navigate through to the files you want to upload as part of this Submittal. Keep in mind to follow a file naming convention agreed upon by the Project Team

Once the files are selected, click "Open"

Creating a New Submittal / Transmittal with Deliverables Management

Add additional files, folders, and delete uploaded files

Select Files

Expand to additional file metadata

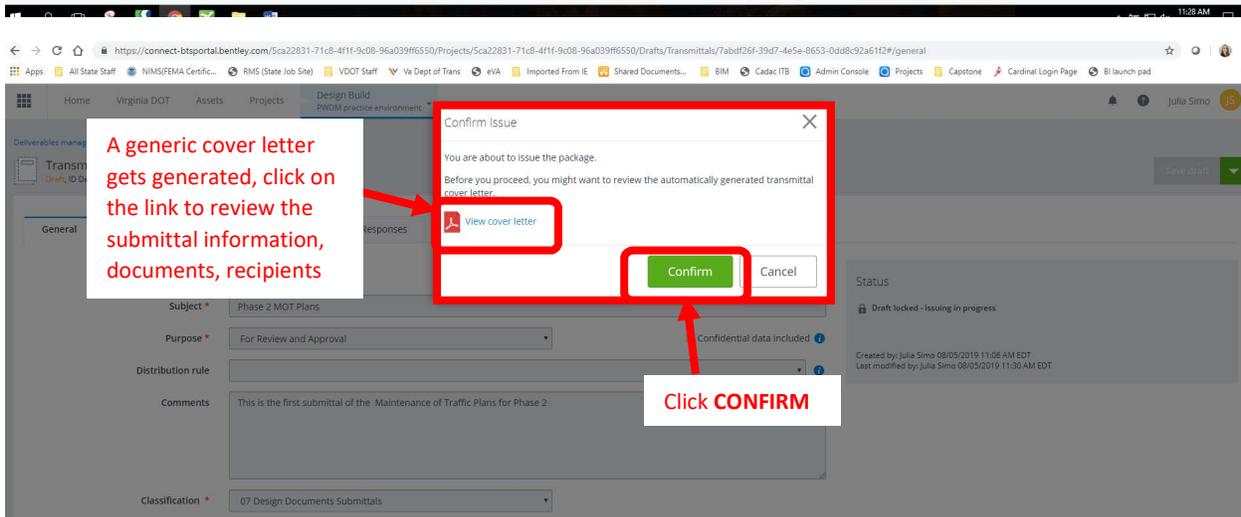
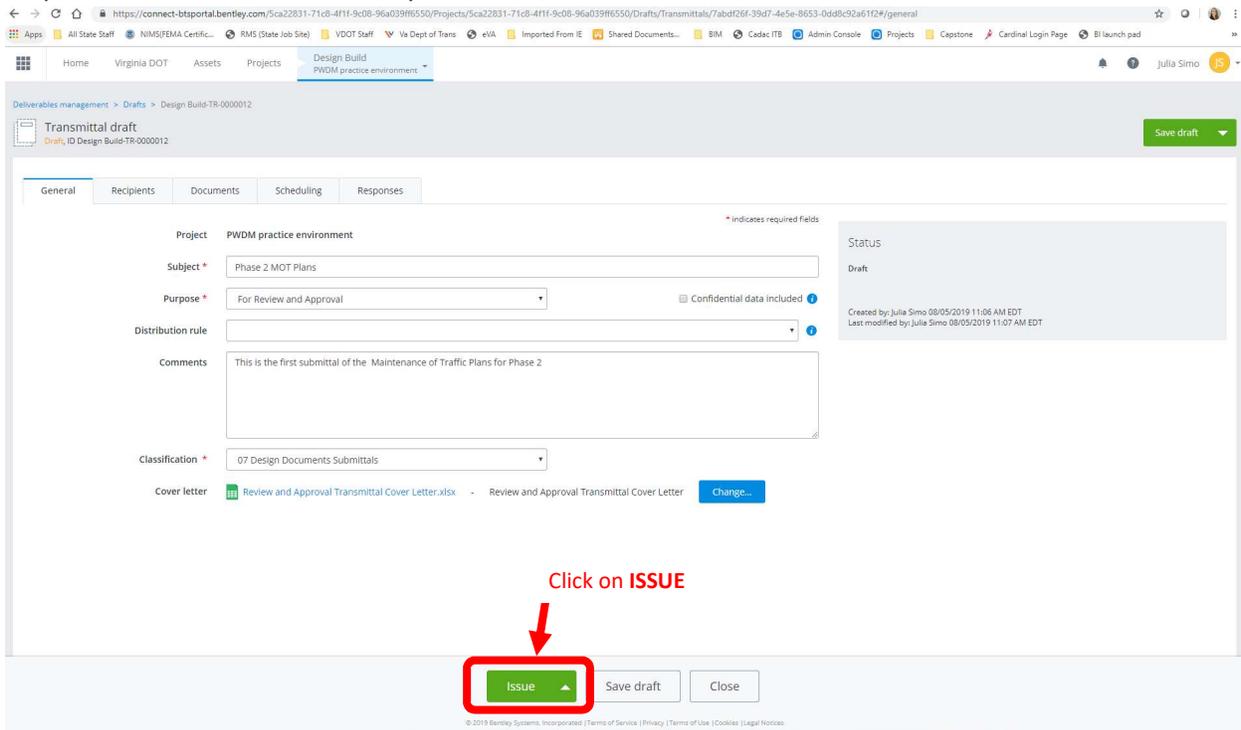
Additional file metadata determined by the project team, this can be in the form of drop down fields or text fields

The scheduling tab is prepopulated based on the calendar days determined by the Project Team. Information can be modified as agreed upon by the Project Team

Issue **Save draft** **Close**

Creating a New Submittal / Transmittal with Deliverables Management

Step 5: Once the submittal is ready click on **ISSUE**



Notes: The submittal has been created, the recipients that were identified will be receiving a generic email that lets them know a submittal came through, if they are required to acknowledge, and if they are required to respond. You will be able to view your submittal on the “outgoing” tab and you will receive an email once there is a new action in the submittal. To view the details and status of the submittal, follow the steps below.

Creating a New Submittal / Transmittal with Deliverables Management



Click on the Outgoing Tab and navigate to the submittal you want to see details for

Click on the Outgoing tab

Filter and search through submittals

Click on the submittal link for additional details

View some submittal details

Subject	Classification	Sent	Purpose	Status	Progress	Actions
BOXX - Demolition Plan ID Design Build-TR-0000002 To Jeremy Kito, Virginia DOT	11 Construction (General)	07/19/2019 11:47 AM EDT	For Review and Approval	14 days acknowledgement overdue Due date: 07/22/2019 11:47 AM EDT 5 days to respond Due date: 08/09/2019 11:47 AM EDT	Acknowledgements 0 / 1 Responses 0 / 1	
Testing ID Design Build-TR-0000006 To Dakota Clifford, Virginia DOT + 1 more	08 Environmental Permits	07/29/2019 2:04 PM EDT	For Review and Approval	4 days acknowledgement overdue Due date: 08/01/2019 2:04 PM EDT 15 days to respond Due date: 08/19/2019 2:04 PM EDT	Acknowledgements 0 / 1 Responses 0 / 1	
Error ID Design Build-TR-000 To Julia Simo, Virginia DOT	06 Schedules	07/29/2019 2:31 PM EDT	For Review and Approval	4 days acknowledgement overdue Due date: 08/01/2019 2:31 PM EDT	Acknowledgements 0 / 1 Responses 0 / 1	
asfd ID Design Build-TR-0000010 To Sarah Wigle, Virginia DOT + 1 more		07/30/2019 11:27 AM EDT	For Review and Approval	4 days acknowledgement overdue Due date: 08/02/2019 11:27 AM EDT 15 days to respond Due date: 08/20/2019 11:27 AM EDT	Acknowledgements 1 / 2 Responses 1 / 2	
Phase 2 MOT Plans ID Design Build-TR-0000012 To Dakota Clifford, Virginia DOT + 3 more	07 Design Documents Submittals	08/05/2019 11:32 AM EDT	For Review and Approval	3 days to acknowledge Due date: 08/08/2019 11:32 AM EDT 21 days to respond Due date: 08/26/2019 11:32 AM EDT	Acknowledgements 0 / 2 Responses 0 / 2	
test ID Design Build-TR-0000005	01 Contract Documents	07/29/2019 10:35 AM EDT	For Information	Acknowledged Due date: 08/01/2019 10:35 AM EDT	Acknowledgements 1 / 1	

Navigate through the tabs for submittal details

Click on the arrow for additional options

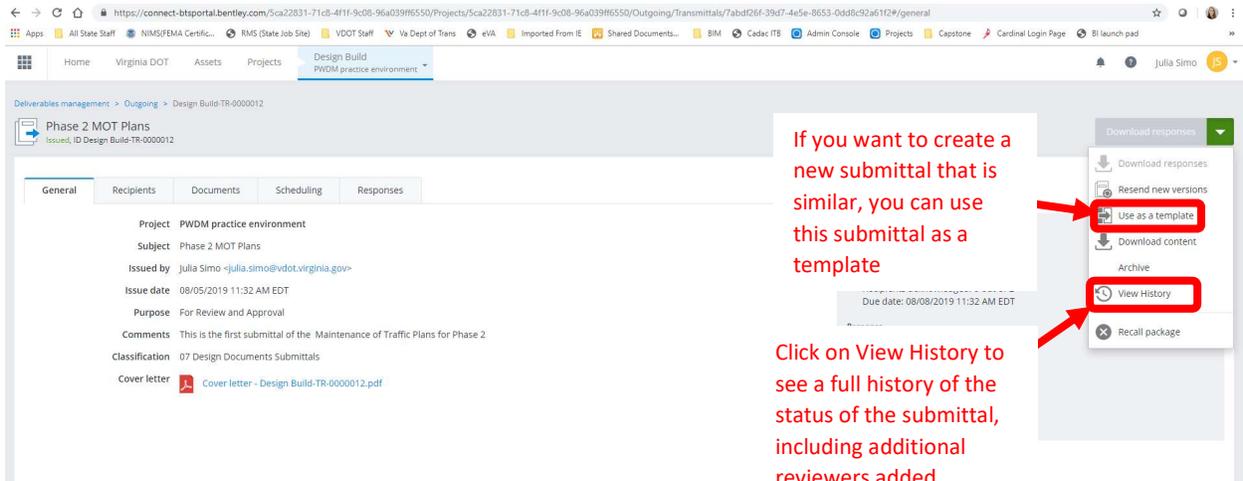
Download responses

General Recipients Documents Scheduling Responses

Project PWDm practice environment
Subject Phase 2 MOT Plans
Issued by Julia Simo <julia.simo@vdot.virginia.gov>
Issue date 08/05/2019 11:32 AM EDT
Purpose For Review and Approval
Comments This is the first submittal of the Maintenance of Traffic Plans for Phase 2
Classification 07 Design Documents Submittals
Cover letter Cover letter - Design Build-TR-0000012.pdf

Status
Acknowledgement
3 days to acknowledge
Recipients acknowledged: 0 out of 2
Due date: 08/08/2019 11:32 AM EDT
Response
21 days to respond
Recipients responded: 0 out of 2
Due date: 08/26/2019 11:32 AM EDT
Issued by Julia Simo
Issue date 08/05/2019 11:32 AM EDT

Creating a New Submittal / Transmittal with Deliverables Management



If you want to create a new submittal that is similar, you can use this submittal as a template

Click on View History to see a full history of the status of the submittal, including additional reviewers added

Download responses

- Download responses
- Resend new versions
- Use as a template**
- Download content
- Archive
- View History**
- Recall package

General Recipients Documents Scheduling Responses

Project PWDM practice environment

Subject Phase 2 MOT Plans

Issued by Julia Simo <julia.simo@vdot.virginia.gov>

Issue date 08/05/2019 11:32 AM EDT

Purpose For Review and Approval

Comments This is the first submittal of the Maintenance of Traffic Plans for Phase 2

Classification 07 Design Documents Submittals

Cover letter  Cover letter - Design Build-TR-0000012.pdf

Due date: 08/08/2019 11:32 AM EDT