# PlanGrid

# Getting Started with PlanGrid Submittals and Automatic Submittal Log

Quickly Become a Power User of PlanGrid Submittals and Automatic Submittal Log

# What's Inside?
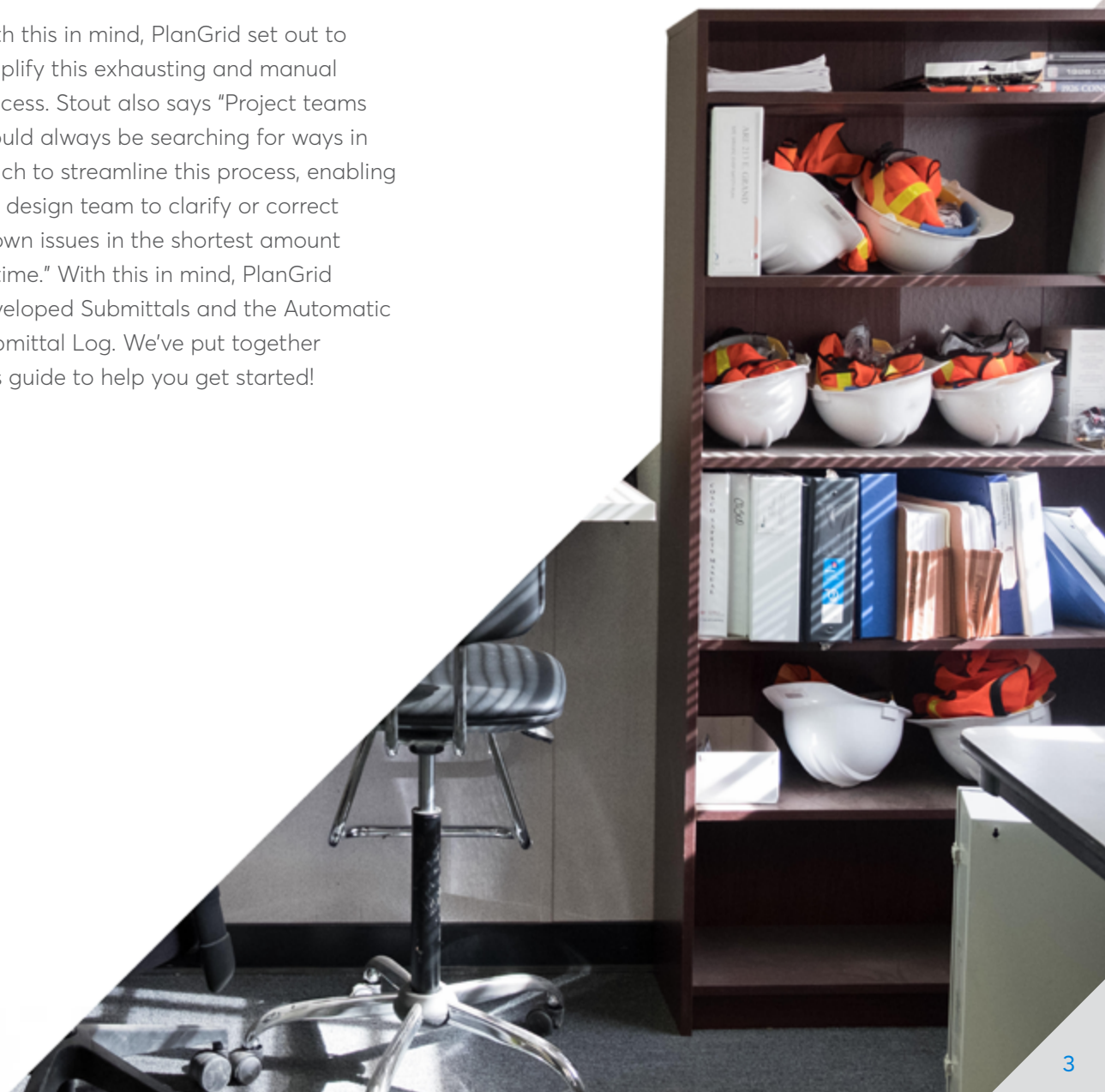
# Introduction

Projects across the world all require some sort of submittal process to occur before beginning construction. As projects become larger and more complicated, the challenges associated with submittals multiply.

Paul Stout, Founder and Director of Education at Power Summit sums up the importance of submittals when he said, "The submittal process is a time-honored method of indicating the contractor's understanding of the plans and specification. The importance cannot be overstated. It is the single best way for owners to ensure quality, functionality and compliance per the plans and specifications. When used properly, it also becomes an early warning system for discrepancies, ambiguities, design issues and antiquated requirements."

With this in mind, PlanGrid set out to simplify this exhausting and manual process. Stout also says "Project teams should always be searching for ways in which to streamline this process, enabling the design team to clarify or correct known issues in the shortest amount of time." With this in mind, PlanGrid developed Submittals and the Automatic Submittal Log. We've put together this guide to help you get started!

# A Deep Dive on Submittals

Before we get into what PlanGrid does for the submittal process, let's back up and review the process.

## What Goes Into a Submittal?

Submittals contain schedules, meeting minutes, product data, shop drawings, test data and product samples. A large project with many subcontractors can have thousands of submittals. Construction contracts require the General Contractor (GC) and each subcontractor to provide documentation and samples to the architects, engineers and consultants before beginning construction.[1]
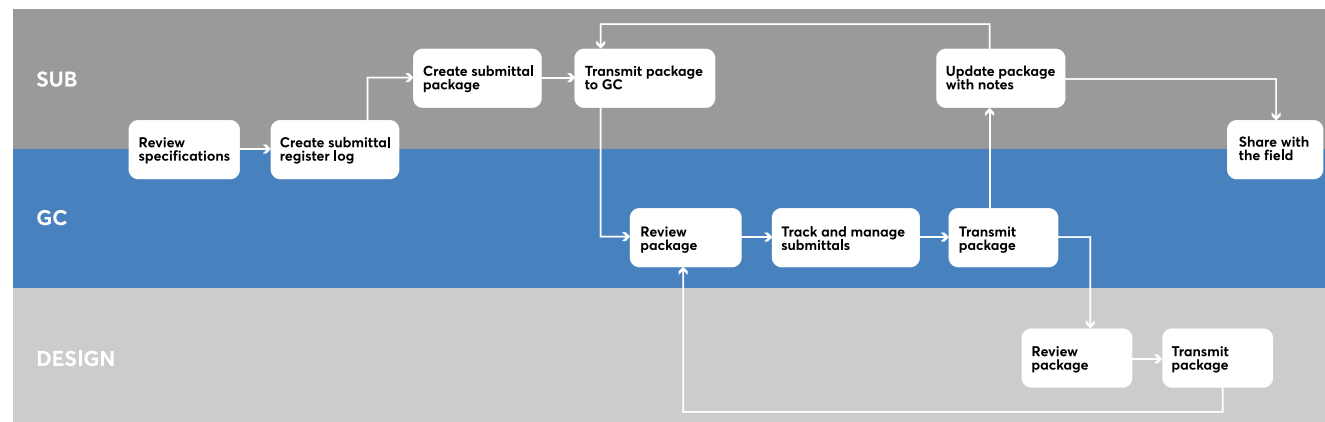
Each submittal has a complicated journey that starts with specification review, followed by inclusion in the submittal log and ultimately ending with distribution to the field. The journey that occurs between those steps are where things get complicated. Once the submittal log has been created, the subcontractor creates a submittal package (one of thousands), which is shared with the GC. The GC can

either approve it and send it on to the design team for further review, or reject it and have the subcontractor revise the documentation. This process can be repeated multiple times, depending on the correctness of the information provided. The GC tracks all the submittals and is responsible for the final package once approval is received from the design team.

## A Visual Overview of the Submittal Process

Since this process is complicated, we visually mapped out the steps necessary for each submittal to achieve final approval and distribution to the field.

Submittals play two key roles in every project. First, they help find problems before you get to the project site. When you catch problems early on during pre-construction, the cost savings can be significantly higher than it would be on the project site.[1] Second, this is your opportunity to incorporate the shop drawings of builders into the project. The design cannot be completed without the input of the builder. Of course, their input must be approved by the architects, engineers and design consultants on the project.[2]

# The Pain of Submittals

Submittals are a challenge. They require hours of manual work searching for project requirements to incorporate into the submittal register log. Manually entering data also presents an opportunity for human error and creates inaccuracy in the final product.[2]

Since the process of generating a submittal can vary by person, it's difficult to get consistent information into submittals from project to project. This excessive time spent on document control can even reduce your team's capacity to start new projects.

# What PlanGrid Does for Submittals

Now let's dig into how PlanGrid simplifies the process. To improve the existing Submittal process, our solution needed to include:

- A method to reduce data entry and replace it with an automated process that could pre-fill information and move steps to a single click

- A simple way to find out if a submittal is on track and if it isn't, provide clear notifications to keep progress moving

- A clear and accountable submittal log of everything that happens

- A quick way to share approved submittals instantly with the field, eliminating delays so you can start building sooner

### Automatic Submittal Log

**What is a Submittal Log?**
Submittal Logs are assembled at the start of a project to track and verify that all materials and designs are approved by the designer–before construction begins. Additionally, a design firm may specify several materials that should be used for each feature of a construction project. Based on these specifications, the contractor has to procure the materials for the job.[3]

Submittal Logs include thousands of line items. The log also includes the requirements and warranties that go along with each item. It's a critical piece of documentation that allows a team to visualize what they need to submit and when to do it. Submittal Logs take days or even weeks to manually complete.

**The PlanGrid Way**

There's a better way to assemble the Submittal Log thanks to the PlanGrid Automatic Submittal Log (ASL). Regardless if a specification book is 100 or 1,000 pages long, Automatic Submittal Log adds efficiency, automation and accuracy to the once tedious process. Now, contractors can upload the project's spec book and in minutes, PlanGrid will automatically pull information from the specifications to create a downloadable spreadsheet containing all of the submittal register items.

Following AIA standards, PlanGrid's Automatic Submittal Log includes product data, shop drawings and closeouts–everything needed to assign submittals to subcontractors. With an immediate list of submittal register items (which can be uploaded directly to PlanGrid), submittal reviews are accelerated so building can start sooner.

## PlanGrid Submittals

The submittal process includes logging, tracking and managing thousands of submittal register items. It also provides an essential system of checks and balances in construction. PlanGrid Submittals standardizes everything that is submitted for review—from material sheets, or shop drawings, to physical mock-ups, samples and everything else in-between.

PlanGrid Submittals brings the field together with the office. Approved submittals are immediately accessible in the PlanGrid mobile app—online or offline. With zero delays, the field team can pin approved documents to the relevant job site locations on their drawings. This ensures workers are building with the correct, most up-to-date materials and in the right locations.

**Streamline the Submittal Review Process**

With PlanGrid Submittals, tracking and managing reviews is no longer a fragmented process. With one click, the platform enables submittal reviews to easily move from the contractor to the subcontractors and design team. Roles and lines of communication are clearly built into the platform. The platform also notifies individuals of what items they're responsible for reviewing, keeping the submittal process moving. Moreover, subcontractors and the design team can also respond to submittal actions either via email or within PlanGrid. It's their choice!

**Identify the Status of a Submittal**

Looking for a complete view of all submittal register items? The PlanGrid Submittals dashboard gives you the visibility to track progress in real-time. From the dashboard, see a breakdown of which submittal items are upcoming or overdue and who is responsible for taking action. This detail can be used to prioritize follow-up and help order needed materials for just-in-time delivery.

**Share Approved Submittals with the Field Instantly**

Getting approved submittals to the field quickly is a challenge. With PlanGrid Submittals, as soon as a submittal is approved it's immediately accessible for the field team to view. With zero delays, subcontractors can pin approved documents to drawings, ensuring their team is building with the correct materials.

Durr Heavy Construction is a New Orleans, Louisiana-based construction company. They specialize in site preparation, demolition, underground utilities and paving and have been using Submittals and ASL on their projects.

"Creating submittals absolutely sucks. We get it, and so does PlanGrid. PlanGrid's new project management software will do the work for you. This software will find all of the submittals, organize them accordingly, and send them out for distribution across the entire duration of a project. You need to get back to work doing what's most important. Building. That is what PlanGrid lets you do. Go build."

# Tips for Getting Started

The submittal review process within PlanGrid is straightforward and mirrors the industry best practices outlined previously. Keep these tips in mind as you roll out PlanGrid Submittals on your projects.

## Best Practices for Getting Started with Automatic Submittals Log

Verify that your specification documents are text documents, rather than images. The extraction process will not work for image-based documents. You can determine this by trying to highlight the text in the document with your cursor. If you're unable to highlight any text, it's an image-based document.

ASL currently works with AIA and CSI MasterFormat (based on AIA standards) documents. So be sure ensure that your documents adhere to AIA standards. To check, AIA documents will have sections and subsections that are defined with codes five or six digits long. These codes will appear at the top of each section.

If you are a member of an organization that has purchased ASL, you will be able to use it on any project you are a member of—regardless of if the project is owned by your parent organization or not.

We know that the uploading and extraction of large documents can take time. With ASL, you don't need to wait. Feel free to walk away from your device or move on to other important work. PlanGrid will automatically email you when the extraction process is completed.

If an updated version of your specifications comes out, simply upload the new version into PlanGrid. When you view the new sheets, they automatically update with any changes.  For example, uploading a set of submittal items won't create duplicates if there are things that are the same in the sheet such as section number or title.

**M.J. Harris Construction Services,** a company that provides large-scale construction services primarily to the healthcare industry, has been using PlanGrid's Automatic Submittal Log product the past few months.

"We have been looking for a tool like this for a long, long time. The data that is produced by [PlanGrid's Automatic Submittal Log] is in a format that is exactly what we have been searching for. This is another tool we will use to streamline efforts in the startup of a project."

**Jeff McJunkin, Project Manager at M.J. Harris**

## Best Practices for Getting Started with PlanGrid Submittals

Decide early on who your Submittal Manager is. Whoever creates the register will be the Submittal Manager by default. Admins can change this and different Submittal Managers can be assigned to individual items too.

Decide who your reviewers are ahead of time. Build this into your project from the beginning, so it's clear who is doing what and when during the submittal process.

PlanGrid groups all submittal statuses into three categories—approved; revise and resubmit; and rejected. If your team use any custom submittal statuses, make sure to add them to your Submittals settings.

Define your review cycles before you begin. A review cycle is typically 14 days in length. This information will be in the project contract, so check it before you set them in PlanGrid.

Check your Submittals dashboard and then check it again! The information in your dashboard sets you up for success when walking into OEC meetings. Your dashboard contains information such as which submittals are assigned to submitters or reviewers, a look at what is assigned to you and details on what items or packages are overdue.

If you don't have ASL and need to create your Submittal items manually, items can be imported from a Submittal Log. The register template can be downloaded from the Settings in your Submittals tab or found here. The fields in the template are optional, based on the amount of detail you need to provide.

If you don't have a spreadsheet that contains all your items, you can create them manually within PlanGrid.

Watchers in Submittals have different permissions than those directly assigned to a submittal. Watchers are given 'view only' access to the progress of a submittal and can't edit or modify it in any way.

When you disable notifications for PlanGrid in your settings, keep in mind that you will no longer receive notifications for Submittals.

When working with your subcontractors and designers, make sure they know that they don't need to purchase PlanGrid to be included in the submittal process. With PlanGrid Submittals, subcontractors and designers can be included via email. A PlanGrid account is not needed to participate.

If you are hyperlinking the approved submittals to specific sheets, decide who will place the hyperlinks. If it's not your Submittal Manager, determine how that person will be notified when a submittal is approved and ready to be hyperlinked.

If you are not an admin on a project, are not assigned any submittal items or packages, or are not a watcher on a submittal or item—you will not have an option to view the submittal process. Unless you're an administrator, you will need to be given explicit permission to view and access submittals. This is accomplished by being added to a submittal item or package, or being included as a watcher of one.

Although only those that have permission to access submittals can see items or packages, once the package is approved and published, everyone on the project can see it in the documents section of PlanGrid.

A published submittal can be exported from PlanGrid and can be directly linked to a specific sheet. The published submittal will also be a part of the as-builts like any other document in PlanGrid. This happens without any additional work or effort by the user.

There is no limit to the number of files you can upload into PlanGrid. We support individual files up to 1.5 gigabytes, so there should be no concern with file sizes. It is still good practice to aim for smaller file sizes if possible, since they will be viewed from mobile devices.

You don't need to upload a new document into the system each time a package is assigned to a new reviewer. For example, if a subcontractor has submitted documentation that is acceptable, the GC can easily send it directly to the next reviewer–all within PlanGrid.

Add a logo to your transmittal page by going to the user account settings page and uploading one. Logos are implemented on an individual user basis to prevent other teams on the same project from creating a page with the incorrect logo on it.

If you have different people on the project that are responsible for different scopes of work, you can bulk assign someone to be the manager for a set of items. This means all responses from the relevant subcontractors will be sent directly to the person you've assigned.

You can prefill details like assigned subcontractor and due dates directly from the spreadsheet.  PlanGrid will automatically populate those items and this information will also show up in each package they are included in. That package created will also automatically inherit those due dates and assignments.

If you encounter any problems with Submittals or ASL, please email specs@plangrid.com and we will review the issue and offer a solution to the problem.

# PlanGrid Professional Services - Training to Help You Succeed

PlanGrid Consulting is here to accelerate your Submittals onboarding and ensure adoption and ROI. With the help of our Consulting team, you can have confidence in setting up your review process between contractors, subcontractors and design teams.

To book a Submittals Workshop for your group, contact your local PlanGrid account manager or reach out to consulting@plangrid.com.

### Streamline the Process

Gain understanding and confidence in who does what and when to set up your submittals tracking flow.

### Develop Best Practices

To maximize ROI, we recommend working with a PlanGrid Consultant to determine company standards and best practices for reviewing submittals in your project.

### Communicate with the Field and Office

Field teams need quick and easy access to finalized submittals, and our team will help you ensure that communication is quick and easy.

# A Case Study With Project Engineer Tyler Creason

Tyler Creason is a Project Engineer working on large heavy civil construction projects for a top national contractor. While his team has been using PlanGrid for more than just submittals over the last 18 months, he was happy to share the impact PlanGrid has had on managing their submittal process.

**Submittals Before PlanGrid**

Prior to using PlanGrid Submittals, Tyler's process was complicated to track and manage. Each submittal requires a conversation with the subcontractor to prompt them to provide a formatted submittal package. After his review of the package, he'd either return it to the subcontractor for revision or pass it on to the design engineer for approval. The design engineer has the same basic interaction: either approve the submittal or return it for revisions. This handoff loop would continue until each package received approval.

All of this communication would take place via email, with tracking occuring in an excel spreadsheet. Each time an email came in with a revision or approval to a submittal, Tyler would manually review it. This included an update to his excel spreadsheet with the new details, an update to any relevant links and color coding to indicate submittal status. Every revision took at least 30 minutes to complete. Multiply that by few thousand submittals and it's clear why this process was a large time sink with opportunities to make mistakes.

When questions about a particular submittal arose, he would have to either simply remember what happened, or follow the email trail in his inbox to find the information he needed. When asked how other team members would find information, Tyler said, "I understood what my process was, but if someone else needed to find any information, they would have to take the time to learn [my process] before they could understand what was going on."

# References

**The Benefits of PlanGrid for Tyler's Project**

After his team decided to use PlanGrid to manage their submittals, he said it took about a week for them to get up and running on the tool. When asked what he was most excited about, he said, "I don't have to manually do anything anymore. The foreman in the field and design engineers have the [PlanGrid] app and can see what submittals are approved in real time. This lets them see what work they can do, based on which submittals have been approved."

Tyler's team is also using PlanGrid's Automatic Submittal Log (ASL), which automatically pulls information from the specifications to create a spreadsheet with all of the submittal log items. When asked about ASL, Tyler said, "Previously we had to read the specs, manually populate the submittal log and show the duration of each submittal. This process took a couple weeks prior to PlanGrid."

Tyler also really appreciates the ability to export the submittals dashboard prior to important meetings. This gives them a clear view of where each submittal is and who is responsible for delivering each piece of the puzzle.  It also allows his team to audit where everything came from, regardless of it arrived via email or was entered directly within PlanGrid. From the Submittals dashboard, you can see at a glance which items are upcoming or overdue. This information lets teams prioritize, follow up and move towards ordering the materials needed to begin construction.

[1] What Are Construction Submittals, and What is the Point of Doing Them?
Submittal.com

[2] The Importance of the Construction Submittal Process - Expert Article
Robson Forensic

[3] A Basic Overview of Construction Submittals
Reshma Sadhu, Plan Academy

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PlanGrid's Construction Productivity Software is the easiest and most cost-effective way to get substantial return on your investment in construction mobile apps. By using PlanGrid you will:
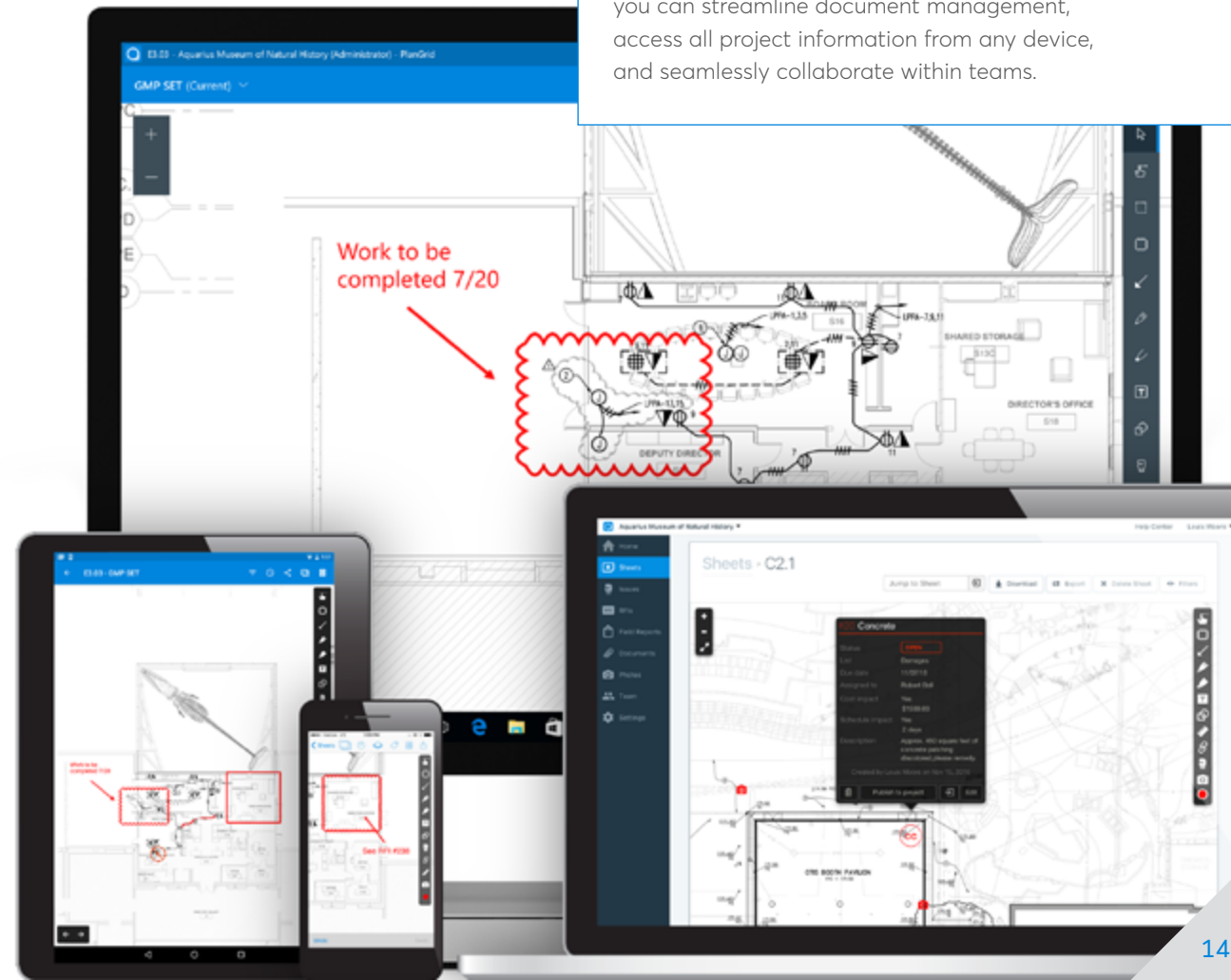
- **Complete projects faster:** 90% of project costs occur in the field and not in the office. This includes wasted time and project delays. With PlanGrid, you can reduce wasteful trips to the trailer and time delays, while eliminating costly rework. PlanGrid also allows for faster collaboration and communication.

- **Reduce costs:** PlanGrid allows you to optimize productivity in the field, which eliminates time waste that causes project overruns. By completing projects early or on time with PlanGrid, contractors will benefit from reduced costs.

- **Win more bids:** The best way to bid more competitively is not just to track costs so you can provide more accurate estimates — it's to improve your overall productivity. PlanGrid's Construction Productivity Software will allow you to increase productivity so you can reduce costs and win more bids.

**Try PlanGrid for Free**

 App Store      Google Play      Windows

There is a reason why PlanGrid is not only the #1 construction app, but also the highest rated. With PlanGrid construction productivity software, you can streamline document management, access all project information from any device, and seamlessly collaborate within teams.

# PlanGrid

Used on more than 1,000,000 projects around the world, PlanGrid is the first construction productivity software that allows contractors and owners in commercial, heavy civil, and other industries to collaborate, collect, and share project information from any desktop or mobile device through the entire project lifecycle.

PlanGrid increases project efficiency by streamlining document management, providing construction teams with easy access to all project information from any device, and enabling seamless collaboration within teams.

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