

# Submittals Exercises

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## Instructor Setup

1. Create the projects needed for the exercises (see instructions [here](#)).
2. Assign students to project(s) (see instructions [here](#)). For instructions on creating a student permission template to assign them the correct permissions for the exercises, see instructions under "Adding Students to Procore" section [here](#) (make sure that students have either "Standard" or "Admin" permissions for the Submittals, Documents and Specifications tools).
3. Upload specifications to each project, review and publish. If you would like to use the Vortex Centre Specifications, you can download them [here](#). Here are instructions for [uploading the specifications](#) to a project.
4. Upload any supplemental submittal files to Documents folder (product data, shop drawings, etc.).

## Things to Consider

- All scenarios are web based and must be completed on a desktop/laptop.
- Specifications must be published first.
- Scenarios 1 & 2 assume students are working in a group/partner pair.
- As an alternative to group work, students can build a submittal workflow and enter the instructor as the assignee in the first step.
- Students with Standard permissions/granular access can *only* create and see *their own* submittals if you have the configuration 'Private by Default' enabled.
- Scenario 3 requires students to add information to an Excel spreadsheet to build the submittal register.
- Times listed are estimates and can vary depending on student groups.

Roles Involved (optional):  
General Contractor – Project Manager  
Specialty Contractor – Project Manager  
Design Team – Architect

### **Scenario 1 | Collaboration Station (~5 min)**

The project engineer at the general contracting company has been asked to create a submittal in Procore. The goal is to loop in each role so that all communication about the submittal between the GC, the tradesperson and the architect is streamlined.

Hint! Once the project engineer creates the submittal, the tradesperson can find the submittal information in the Documents tool.

Once the project engineer receives the information back from the tradesperson, it should be sent off to the design team.

Reference <https://en-ca.support.procore.com> if you get stuck to find support articles that will help walk you through this process.

### **Scenario 2 | No Room for Errors (~5 min)**

The design team has just received the submittal complete with the submission from the trade and PE approval. After reviewing the submittal information, the architect determines that there are revisions needed before they can approve.

The architect should send the submittal back to the general contractor's project engineer.

The project engineer should determine the best way to initiate a revision.

Run the revision through the workflow.

### **Scenario 3 | Register Realities (~10 min)**

The contracting company that you work for has just assigned you to a new job. As the project engineer, you are tasked with building out the submittal register.

Choose 2 specification sections. Build out one section's submittal register onto an Excel file manually. Build out the other section's submittal register through the Specifications tool's shortcut.

### **Scenario 4 | Ch-Ch-Ch-Changes (~10 min)**

In a small group, discuss the benefits of bulk actions. When might you need to edit the Submittal Manager? The submittal status? In what circumstances might you want to apply a workflow in bulk?