Create and Import a Submittal Register using the Template Quick Reference Guide

Adding a submittal register to your project has many advantages, including:

- Being able to use the register to spot-check specific items.
- Assuring all submittals are numbered and named similarly to reduce the chances of a free-for-all on the subcontractor/contractor side.
- Using the logs to export full lists of the incomplete/complete submittals for your use.

Project Administrators can create and import a project submittal register following the steps below.

Best practice is to import the submittal register before uploading any submittals to the project.

Create a Submittal Register from the Template

*To watch a short video of the creation process, click **here**.*

1. Use of the submittal register requires the **Submittal Numbering Method** be set to either **Sequential** or **Sequential per Spec Section**. Manual numbering is not supported with use of the submittal register.
2. Click the following link to download the submittal register import template: **NPCL_Submittal_Register_template.xlsx**. Complete all the steps listed below to properly fill in the template.
3. Erase the sample data, beginning with Row 2, before entering project information as described.

Column A - The Spec Section is a **required field**

- Best practice is to limit spec section numbers to 5 or 6 characters.
- In order for the template to import correctly, the system uses a maximum of 20 characters for the spec section portion of the overall submittal number.
- If more than 20 digits are used, the submittal numbers may be incorrect in the logs.
- If more than 6 digits are used, you must select the "15 to 20 alphanumeric" numbering template option in the module configuration **Submittal Numbering Configuration** section.

Column B - The Item Title is a **required field**

- The Item Title is used as the title for the spec section or the actual submittal.

Column C - Trade

- Inserting a trade is highly recommended but not required.
    - Some reasons to use trades include:
    - Filter submittals based on trades.
    - Project Administrators can configure the software to automatically forward submittals to the appropriate secondary reviewer based on the trades they are linked to.

      *See **Auto-Forward Submittals to Consultants, Engineers, and Owner Reviewers** for additional information on this feature.*

    - When the trade information is listed in the template, the trade automatically populates when a NEW submittal is added.
- If you choose to use trades, you can separate multiple trades for a single specification section with a pipe character "|". The pipe character is typically located above the Enter key.

Column D - Category

- Inserting a category does not always apply.
- Some reasons to use categories include:
    - Project may be separated into sub projects (i.e., phases or buildings).
    - Filter submittals based on category.
    - If the category information is listed in the template, the category automatically populates when a NEW submittal is added.
- If you choose to use categories, separate multiple categories for a single specification section with a pipe character "|". The pipe character is typically located above the Enter key.

Column E - Date Expected

- Inserting **Date Expected** is recommended but not required.
- If an item on the submittal register is tagged with a **Responsible Contractor** and a **Date Expected**, late notices are sent to the contractor if the item is open beyond its expected date.

*Note that **Responsible Contractor** information can only be added via the **Submittal Grid** after the initial submittal register import. See the **Submittal Register Module Grid** article for more information.*

Columns F-X - Submittal Types

- Add, edit, or delete the required submittal types as needed for your project.
- Place an **uppercase** "Y" in each cell to designate the required submittal types for each spec section.
    - If no submittal type is selected, once imported, those specification sections show as Complete because no submittal types were chosen for that item.
- The **Other** column can be used for a required submittal type if it is only being used for that one item. This eliminates the need to insert a new column in the template.
    - If an uppercase "Y" is placed in the **Other** column, you must enter the name of the type in the **Other Type Label** column.
- The **Other** and **Other Type Label** columns are **required for import**, even if they are not used.
    - **These two columns must be the last two columns listed in the template. If they are deleted or moved, the template will not import.**

4. In order for the template to import, the steps below ***must*** be followed:

    - Columns A - E must stay in their original order even if they are not being used.
    - Do not hide columns or change column header names.
    - Do not use formulas to populate project information.
    - If highlighting or additional grid lines are used to help track information entry, make sure to remove them before attempting import.

5. Once the template is complete, save the file as an Excel file.

Once your template is complete, you are ready to move on to Step 2: Configure the Submittal Module and Prepare the Template for Import.

Configure the Submittal Module and Prepare the Template for Import

Now that the submittal register template is populated correctly, the next step is to configure the Submittal Module to prepare for import.

To watch a short video of the configuration and preparation process, click ***here****.*

1. From the **Submittals** module, select **Administration>Module Configuration**.
2. Scroll down to the Submittal Numbering Configuration section.
   - If your spec sections include more than 6 digits, select **15 to 20 alphanumeric** from the **Numbering Template** dropdown list.
3. Scroll down to the **Submittal Type** section.
   - **The Submittal Types listed in the template and in module configuration must match exactly.**
     - This includes the **names of the Types and the order in which they are listed**.
   - If you need to reorder the Submittal Types in module configuration to match the order in the template, use the cross hairs to the left of the type to drag and drop it to the correct location in the sequence.
     - Click **Save Settings** below the **Submittal Type** section after reordering each type.
   - Add any **Submittal Types** listed in the template that are not in the module.
   - Delete any **Submittal Types** from module configuration that are not listed in the template.
     - Click the trash can icon to the right of the type to delete it.
4. Click **Save Settings** below the **Submittal Type** section after making a change.
5. Scroll down the **Category** and **Trades/Disciplines** sections.
   - **The Categories and Trades/Disciplines listed in the template and in module configuration must match exactly.**
     - For these items, the order in which they are listed does not matter.
   - Add and/or delete the Categories and Trades/Disciplines as needed to match the submittal register template.
   - Click **Save Settings** below each section after making a change.

Now that the submittal module is configured correctly, the next step is to prepare the template for import.

1. Open your submittal register template.
2. Make sure all the spec section numbers contain the same number of digits – either 5 or 6.
3. Separate multiple trades and/or categories with a pipe character "|".
4. The format of any dates entered in the **Date Expected** column must match the **Date Format** selected in your **My Profile page** (i.e., MMDDYYYY).
   - To verify the date format, click the **gear icon** in the upper right corner of the ConstructEx interface. Select **My Profile** from the dropdown list.

5. Remove any formatting, highlighting or formulas from the template.
6. Unhide any hidden rows and/or columns.
7. Delete any blank rows within the body of the template. If imported, they will create blank register items.
8. Delete any additional worksheets in the template.
9. Note the number of rows containing information in the Excel file.

Once the template is complete:

1. Save the template as an Excel file.
2. Save the file again as a **Text(Tab Delimited) (*.txt)** file.
3. Select **Yes** to keep the workbook in the text format.
4. Close the .txt file and, when prompted, select **Don't Save**.

Once your template is saved as a .txt file and your Submittals module is configured, you are ready to move on to Step 3: Import the Submittal Register into Your Project.

Import the Submittal Register into Your Project

Now that the template is complete and saved as a .txt file, the next step is to import the text file into your project.

*To watch a short video of the import process, click **here**.*

Ensure that your submittal register does not contain duplicates of items already present in Project Cloud. Duplicate items will create duplicate entries on the submittal register.

1. Open the .txt file.
2. Note the number of rows in the file and verify that the number of rows matches the number of rows in the template.
3. Delete any blank rows from the bottom of the text file. Blank rows will create blank register items during upload.
4. Remove all quotation marks from the text file. Use the Find and Replace feature to search for them.

We strongly recommend that you search for quotation marks, even if you do not immediately see any. Note that you many need to repeat the search multiple times.

5. Save the file again as a **Text(Tab Delimited)(*.txt)** file.
6. Select **Yes** to keep the workbook in the text format.
7. Close the .txt file and, when prompted, select **Don’t Save**.
8. From the **Submittals** module, click **Submittal Register>Import Submittal Register** at the bottom of the right side column.
9. On the **Import Submittal Register page**, click **Choose File**. Browse to your submittal register template text file.
10. Click **Upload** to process the file.

11. If your register imports **correctly**, a **green bar** appears at the top of the page with the number of items imported.

    - To confirm, cross-check the number of lines imported with the number of lines of data in your Excel file.
    - If there are any issues with the import, an error message appears and no records are imported.
        - Copy and paste the error messages into another document for your reference.
        - Make corrections to your Excel file as needed and repeat the process to create the text file. Once you have corrected the errors, repeat the import process.

*If you selected the **Other** column and did not place an entry in the **Other Type Label** column, the file will import; however the software will notify you that the label is missing for the item.*

The final step is to enable the automation of the submittal register in the project:

1. In the **Submittals** module, select **Administration>Module Configuration**.
2. Scroll down to the **Submittal Numbering Configuration** section.
3. Select the **Restrict Specification Section to Submittal Register Entries checkbox**. This enables use of the submittal register.
4. Click **Save Settings** below the **Submittal Numbering Configuration** section.

Once the register is in place, any project administrators can edit the register with the following tools:

- **Submittal Register grid tool**
- **Edit a Submittal Register item**
- **Add a Submittal Register item**