

## Using the ePM Submittal OBA

### What is the Submittal OBA?

The Submittal OBA will allow users to create new submittals and edit existing submittals for a project. The OBA will also allow users to upload one or more attachments to a submittal item or submittal package.

**Note:** Specific security permissions are required to access, edit and update the Submittal OBA at the various stages of its lifecycle. Contact your GSA Regional Administrator if you feel your access rights are incorrect.

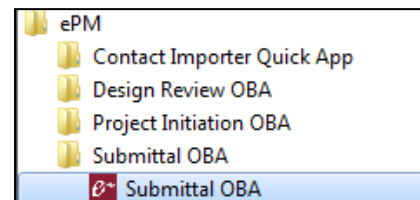
### Who Will Use This?

- ✓ GSA ePM Regional Admin
- ✓ Project Managers
- ✓ General Contractors
- ✓ Construction Managers (CMA)
- ✓ Architect/Engineers

## Create Submittals Using the OBA

1. Open the Submittal OBA by going to **Start | Programs | ePM | Submittal OBA | Submittal OBA**.

**\*HINT\*** You can also create a desktop shortcut to the OBA.



Excel opens, showing the OBA, followed by an ePM login screen

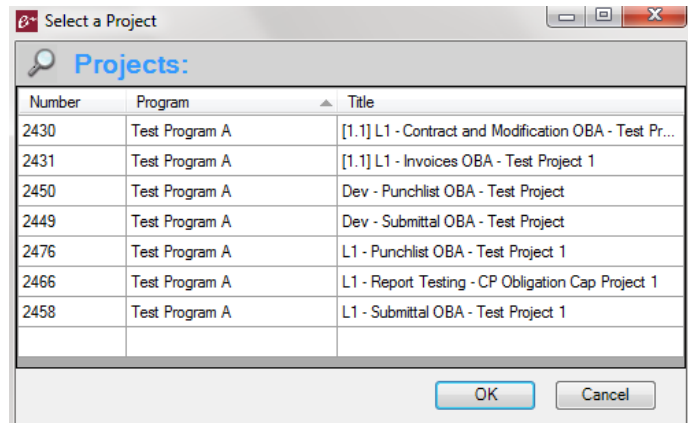
2. In the “Host” field, enter **https://epm.pbs.gsa.gov/Proliance**.
3. In the “Org” field, enter “pbs”.
4. Then enter your “Username” and “Password” credentials.

 A screenshot of the ePM login dialog box. The title bar reads 'ePM'. The main title is 'ePM Electronic Project Management'. There are four input fields: 'Host Name:' with the value 'https://epm.pbs.gsa.gov/Proliance', 'Org:' with the value 'pbs', 'Username:' which is empty, and 'Password:' which is empty. At the bottom right, there are 'OK' and 'Cancel' buttons.

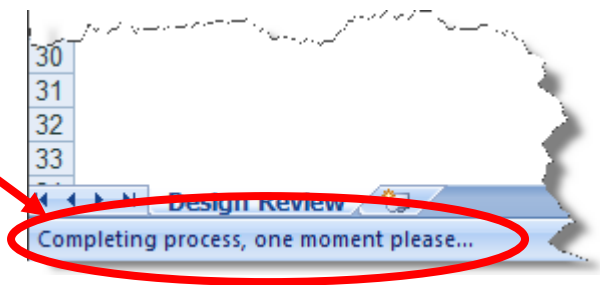
If you have the appropriate security permissions, the “Select a Project” dialog box displays.

# Create Submittals Using the OBA, cont.

- Click anywhere in the row of the project in which you want to create or edit a submittal document, then click **'OK'**.

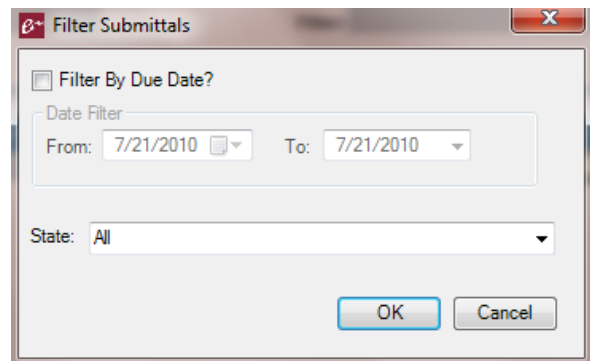


While the OBA checks the project you selected, Excel displays a status comment.



The **'Filter Submittals'** dialog box displays.

- Use the **'Filter By Due Date'** check box to find submittals due between certain dates, and/or select a certain workflow state using the **'State'** drop down list. You can also view all existing submittals by simply clicking the **'OK'** button.



The OBA worksheet displays all existing Submittals as individual rows.

# Create Submittals Using the OBA, cont.

- In the first empty row, click in the **"Name"** cell and enter a name for the new Submittal.

**General Information**

Project Number: 2458      Project Name: L1 - Submittal OBA - Test Project 1  
 Program: Test Program A      Filter:

**Submittals**

Number	Revision Number	Is Latest	File(s) Attached	Name	Sp
000011R01	R01	Yes	Yes	TS 2.8.1 testing - submittal 1	00 01 Dra
000012R00	R00	Yes	No	TS 2.8.1 testing - submittal 2	00 Pa
				New Submittal	

**Note:** of all the fields on the OBA, only **"Name"** is required.

Tab out of the **"Name"** field, or click in another cell, and the background color of the cells in the new row changes.

**Submittals**

Is Latest	File(s) Attached	Name	Specification Section	Sub-Section	Cl
Yes	Yes	TS 2.8.1 testing - submittal 1	00 01 15 : List of Drawing Sheets	drawing sheets; subsection by cm	FIO : For Only
Yes	No	TS 2.8.1 testing - submittal 2	00 01 05 : Certifications Page	certifications -- edits by tae1 via the ui	REQ
		New Submittal			

Cells shaded in gray are read only (data can be entered in these blue shaded cells, but it will not be saved or imported to ePM). Only data entered in cells with beige shading will save to ePM.

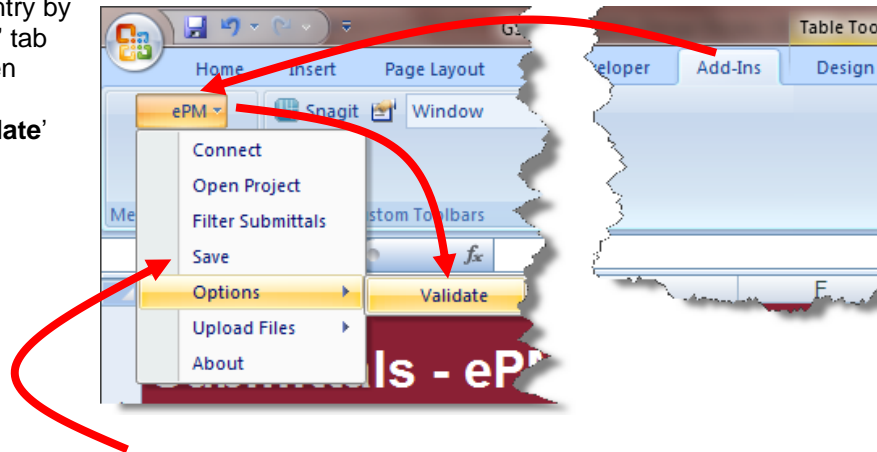
There are seven fields on the OBA (shown at right) which are available for entering and editing data. However, depending on your security permissions, even these seven fields may be read only (cells shaded in blue) when a Submittal is in a certain workflow state.

Fill in the remaining fields in the row, either by entering text manually, or choosing from drop down lists.

Name	Specification Section	Sub-Section	Submittal Classification	Discipline	Due Date	Source Contact
Concrete	03 30 : CAST-IN-PLACE CONCRETE		APR : Approval Required	C : Civil	7/30/2010	Test GC Contact1
Mark's brick sample	03 48 13 : Precast Concrete Bollards	Bricks	AD : Administrative	A : Architectural	8/1/2011	John Bunch
Mark's security fence	32 31 29 : Wood Fences and	20-ft Security Fence	RED : Required	L : Landscape	8/15/2010	Test CM Contact1
my test with one line - offline	00 01 01 : Project Title Page	the formatting doesn't work the	AD : Administrative			
offline test 1 for 0.0.5 in 2003	00 01 01 : Project Title Page	new lines really look				
offline test 1 for 0.0.5 in 2007	00 01 01 : Project Title Page					Test GC Contact1
ST Test In Review Submittal Item						GC1

## Create Submittals Using the OBA, cont.

8. Validate your data entry by clicking the **'Add Ins'** tab of the worksheet, then clicking on **'ePM'**, **'Options'**, and **'Validate'**



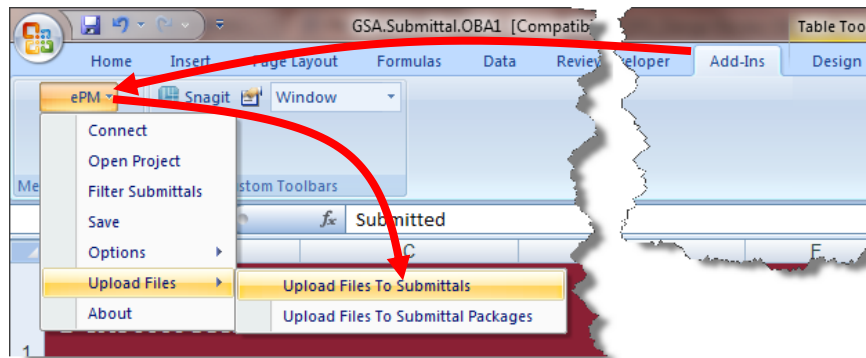
After successful validation, save the document by clicking **'ePM'**, then **'Save'**.

## Upload Files to Submittals & Submittal Packages Using the OBA

9. Launch the OBA, log in, connect to a project, and view all (or filtered) submittals by following steps 1 through 4 above.

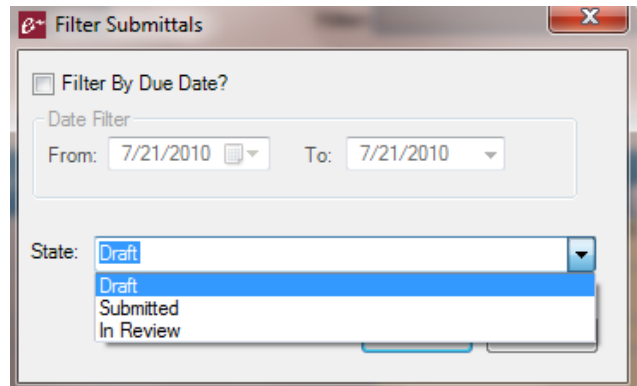
10. Click the **'Add Ins'** tab of the worksheet, then click on **'ePM'**, **'Upload Files'**, and **'Upload Files to Submittals'**.

Note: The process for uploading files to a Submittal Package follows the same steps as for uploading to an individual Submittal.

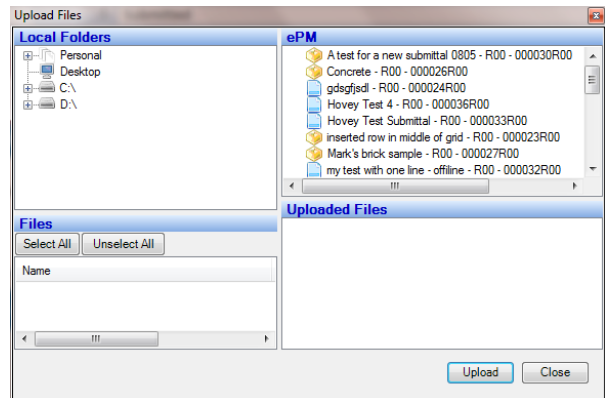


# Upload Files to Submittals & Submittal Packages Using the OBA, cont.

11. In the **'Filter Submittals'** dialog box that displays, you can optionally filter the full list of submittals by **"Due Date"**, but you **MUST** select to filter the full list of submittals either by **"Draft"**, **"Submitted"** or **"In-Review"** (these are the only workflow states in which you can upload a file). After selecting your filters, click **'OK'**.



12. The **'Upload Files'** dialog box displays, and initially shows just the file structure on your local computer (in the **'Local Files'** section), and the Submittals returned from the filter criteria you entered (in the **'ePM'** section).

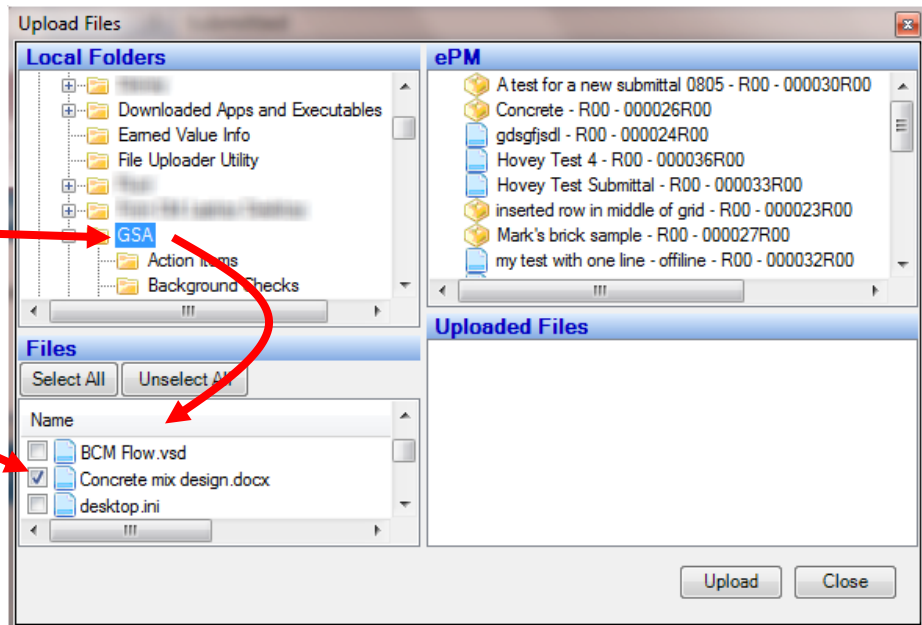


## Upload Files to Submittals & Submittal Packages Using the OBA, cont.

13. Browse for the file you want to upload by expanding one of the drives shown in the the 'Local Folders' section.

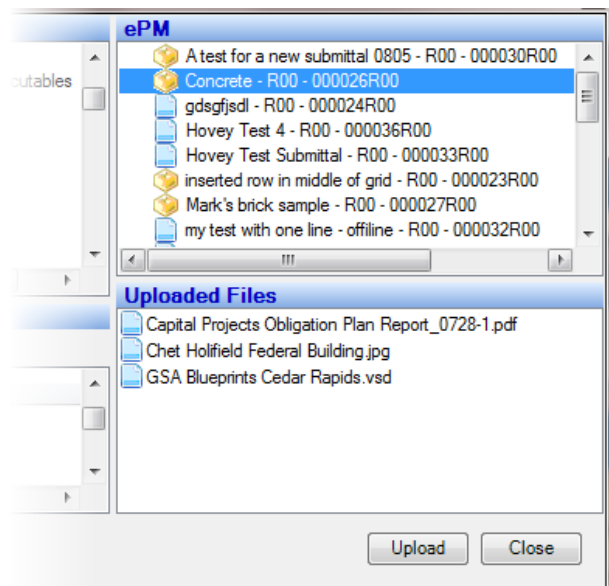
Clicking on a folder displays the files in that folder.

Check the box on the file(s) you want to upload.



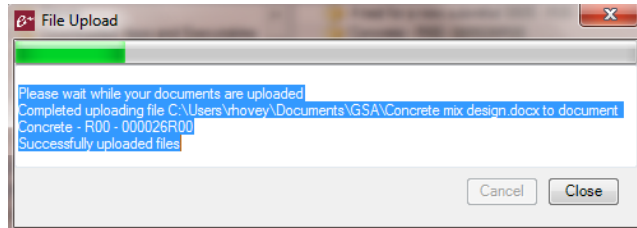
14. In the 'ePM' section, click on the destination Submittal. A yellow box icon means the Submittal already has at least one document uploaded to it, and those are listed in the 'Uploaded Files' section.

Finally, click the 'Upload' button to upload the file(s) you selected to the Submittal document.



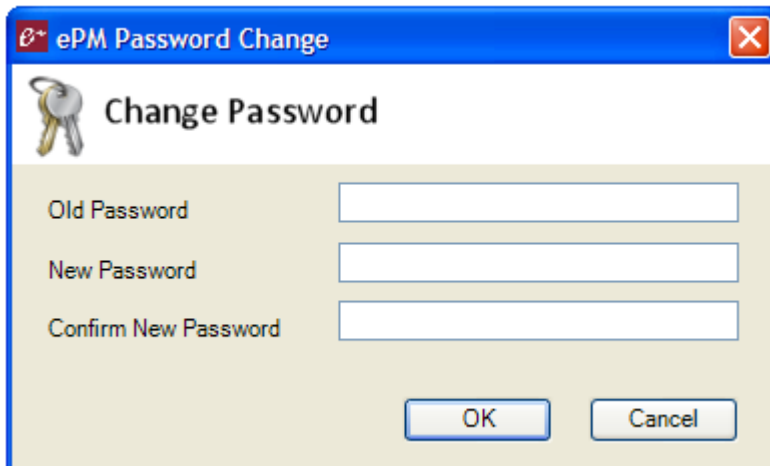
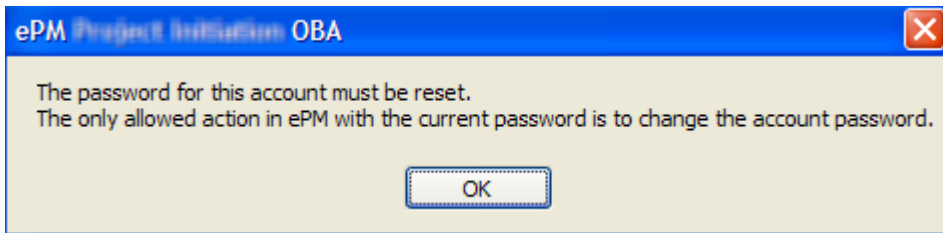
# Upload Files to Submittals & Submittal Packages Using the OBA, cont.

During the upload, a status box appears.

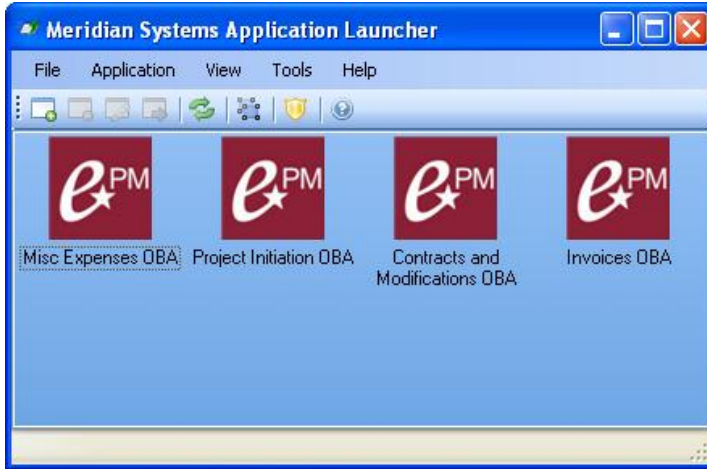


## Tips

- ✓ When presented with password update requests such as noted in the sample below, you can update your password by clicking OK and entering the appropriate data in ePM Password Change dialog box.



- ✓ You can use and open multiple ePM OBAs using the Meridian Systems Application Launcher tool.



- ✓ Clicking the online help button provides generic help related to ePM, NOT for the specific uses of GSA's documents.



- ✓ To explode or collapse sections in a document, click on the double headed arrow buttons:



- ✓ For additional help and support, contact your GSA Regional Point of Contact.