How to use the Automatic Submittal Log

A quick note on the program: although it runs on Python, you do not need to install anything to run it. All files necessary are already present within the folder.

# Overview

The automatic submittal log process involves 5 distinct steps in which the end user needs to interact with the program:

1. File loading
2. Filter state saving
3. Placeholder comparison
4. Running
5. File saving and extraction

Note that the purpose of the automatic submittal log program is automate all feasible submittals within the log. This may exclude some submittals that cannot be matched by the program, in which case, they must be added manually.

The current version of the automatic submittal log is designed around WMATA title formatting. If the title is in a different format, please refer to the Adjustments section.

# File Loading and Preparation

Before beginning the file loading and preparation process, clear the “Files” folder completely. Delete the files present in the folder and ensure that there are no documents in the folder before continuing.

To run the automatic submittal log program, two files are needed: a copy of the submittal log, and the Procore data.

### Procore Data formatting

Instead of downloading the Procore data in Excel formatting, download it as a CSV instead. Rename the CSV from the initial Procore to “data”. Make sure that the file has the Excel icon in File Explorer; if it does not have the icon after renaming, change the name to “data.csv”. Copy this file and paste it into the “Files” folder.

### Excel Data Formatting

Copy the Live submittal log and paste it into the “Files” folder. Rename it to “submittal\_log”. Make sure that the file has the Excel icon in File Explorer; if it does not have the icon after renaming, change the name to “submittal\_log.xlsm”.

# Filter State Saving

Because the library used to edit the submittal log Excel sheet does not interface well with filters, it removes the filters present in the sheet before updating the log. Ensure that any filter present on the copy of the submittal log is either noted or present elsewhere, such that it can be reinstated before being sent to the live version.

# Running

To run the program, double click the “run” file. A black terminal box should open, and will describe the processes occurring internally, and provide you with change information and input areas for later stages. In some cases, the Excel sheet will open a pop-up for

# Placeholder Comparison

Because the placeholder matching for new submittals is built on a language processing model, it can be wrong sometimes. In the cases in which the program detects a possibility of error, it refers to the user to provide verification. A dialogue as shown below is presented in the command terminal. A list will be displayed of the 4 closest matches to the submittal file name, in addition to a “none of the above” option. To select an item of the list, enter in the number of the option, and press Enter. Any input that is not a number in the list will default to the “none of the above” option.

A screenshot of a computer

Description automatically generated with medium confidence

After the option is selected, the program will place the submittal into the chosen placeholder. If the “none of the above” option is selected, it will be inserted as a new submittal into the Excel sheet.

For some submittals, the program will be unable to find any spec sections that match (typically due to discrepancies between the Excel sheet and the spec on the Procore logs). These must be added in manually.

# File Saving and Extraction

Because the program edits the Excel sheet live, it is important to save the document before exiting out of it, otherwise the changes will not be saved. The file should additionally be renamed before being reintroduced to the live submittal log folder.

# Logging

Every time the program runs, it maintains a log that keeps track of the changes made. The title of the log is displayed at the beginning of execution, with the log being available in the “logs” folder.

# Adjustments

Some aspects of the program can be changed to better suit the task at hand. These are stored as options in the config.ini file, which can be opened with Notepad.

A screenshot of a computer

Description automatically generated

To change an attribute, change the value on the right-hand side of the equals sign. An overview of the attributes and their effects on the program is shown below.

### TitleFormat

Decides how the program interprets the title. If it is set to standard, it uses whatever is in the “Title” field in the Procore submittal. If it is set to WMATA, then it omits the first word in the title, which is assumed to be a submittal code. Program defaults to “Standard” if not defined to known value.

### ChangeSpec

Changes spec to reflect the parameters set in SpecFormat if set to true. Otherwise, the spec remains unchanged.

### SpecFormat

If set to long, appends the full spec section to every spec section. This process does not check if a spec section is already long, so use this sparingly. If set to short, omits the first part of the spec section. This does not work well on spec sections containing multiple sections.