WORKFLOWS

Approved Submittal. Installed Product. Do They Match?

An approved product record and a completed installation are two different facts. The project needs evidence connecting them.

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Approval does not travel by itself

I am interested in the space between what a project approves and what it ultimately builds. It is a space filled with purchasing decisions, delivery substitutions, configuration choices, field conditions, and ordinary human assumptions. A submittal can move through review correctly while the installation still ends up different from the intended result.

The solution is not simply to demand more paperwork. It is to connect the approved information to the specific work where it matters. When a person checks an installation, the applicable product and configuration should be available without a separate investigation through folders and correspondence.

That connection makes verification a practical part of construction.

Be precise about what was reviewed

A product family may contain many configurations. The manufacturer’s name and general model series do not necessarily identify the approved voltage, capacity, finish, accessory, or mounting arrangement. A cover sheet marked reviewed can conceal unresolved details if the project treats it as a blanket statement about every page.

I would preserve the actual review disposition, including qualifications and exceptions. The project should be able to identify which revision applies to which scope and whether a later submission supersedes part of the earlier information.

A submittal record also does not replace the governing design requirements. The people responsible for review and acceptance still need to evaluate the relationship among the specification, drawing, submitted information, and any authorized change. The software should make that relationship easier to inspect.

Follow the product into the field

Consider a pump delivered to a mechanical room. Its identification plate can help establish what arrived, but the verification may also need to address selected accessories, connection orientation, and installation conditions. The required checks depend on the project and the equipment.

The important point is that the delivered item should connect to the intended asset or installation, rather than merely to a purchase order covering many items. That gives the receiving team a specific comparison to make.

If the product differs, the record should capture the difference and route it for disposition. A field user should not have to choose between accepting something uncertain and blocking an entire shipment without context. The project needs a visible exception with a responsible reviewer.

Separate receipt from acceptance

I would avoid treating delivered, installed, and accepted as interchangeable statuses. Receiving an item establishes that it arrived. Installation establishes a different event. Acceptance may require further checks, documentation, or tests.

These distinctions are useful when work moves quickly. An item may be physically in place while a configuration question remains unresolved. The project needs to see both facts. Hiding the installation until everything is accepted makes progress inaccurate; declaring it complete without the exception makes readiness inaccurate.

The record should show what was observed, which requirement was checked, and who made the resulting decision. Where a photograph is useful, it should identify the relevant feature clearly enough for later review. A general room photograph may provide context without proving the specific attribute at issue.

Keep substitutions traceable

Changes happen. Availability, schedule, and field conditions can lead a team to consider an alternate product. The important control is a documented path from the proposed difference to an authorized decision and then to the records used in the field.

An email approving a substitution should not remain disconnected from the installation it governs. If the change affects maintenance information, a test procedure, or a related component, those implications should be carried forward too.

I would retain the earlier information as history and identify the current applicable decision. That allows someone reviewing the completed work to understand the change without mistaking the original selection for the installed condition.

Use technology to focus the review

There is a useful role for AI in extracting product attributes, finding likely document matches, and highlighting differences. There is also a clear boundary: a suggested match is not the same as an authorized acceptance.

The reviewer should see the source of an extracted value and the reason an item was flagged. If a photograph does not show the necessary attribute, the system should ask for additional evidence. It should not fill the gap with a confident assumption.

This is the kind of connected workflow I want to build around project objects and locations. The system helps people reach the right comparison while preserving their responsibility for the decision.

The result is a stronger record for everyone downstream. Quality staff can trace what was checked. The project team can see unresolved differences. The owner can understand what was actually installed and why it differs, if at all, from the original requirement.

What’s Next

Next, I’ll look at how specification requirements can reach those same field workflows instead of remaining isolated in the project manual.

Read online: inertiasystems.com/resources/blog/approved-submittal-installed-product-do-they-match

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