

Submittals Quick Reference Guide

This topic provides a reference for the Project Center **Submittals** activity center.

Purpose

The **Submittals** activity center in Newforma Contract Management enables you to effectively log submittals and track them through their approval process. You can log and track electronic file transfers (whether done via Info Exchange, email or a drag and drop site) or physical transfers of information (such as product samples and paper drawings) for each project.

Audience

Architects, engineers, construction professionals and owners.

Key Features

- Streamline submittal management.
- Manage construction-related project information.
- Capture and connect interrelated contract management work processes.

Received Submittal Workflow

The following workflow options are available for tracking submittals in the project. Not all steps have to be used for each submittal.



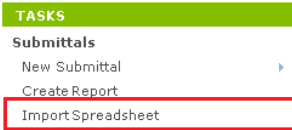
To import expected submittals

You can import a schedule of expected submittals and then match them up as they are received. This allows you to easily identify which submittals are still outstanding.

1. Open the Import Submittal template file located in the following **Templates** directory on any computer where Newforma Project Center is installed: C:\Program Files\Newforma\Eleventh Edition\Project Center\Templates\Import_Submittal_Template.xlsx.

*If you installed the 32-bit version of Project Center, the **Templates** folder may instead be located in C:\Program Files (x86)\Newforma\Eleventh Edition\Project Center\Templates\Import_Submittal_Template.xlsx.*

- Set the **Draft Status** for each line item submittal to **Expected** in the spreadsheet.
- Go to the **Submittals** activity center by selecting **Activities > Contract Management > Submittals** and select **Import Spreadsheet** from the **Tasks** panel.



- Browse to the saved spreadsheet and import. The imported submittals are listed under the **Expected** category in the **Submittals** activity center.

The screenshot shows the 'SUBMITTALS - FOWLER SQUARE DESIGN (2010338.01)' activity center. A dropdown menu is set to 'Expected (1)'. Below it is a table with the following data:

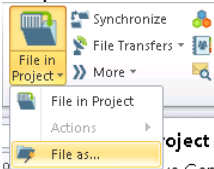
ID	Sender ID	Spec Section	Subject	Status
26 50 00 03		26 50 00	Theatre Lighti...	Expected - Ov...

To log a received submittal from email

You can log a received submittal directly from Outlook.

*You must have the **Project Center Add-In for Microsoft Outlook** installed.*

- In Outlook, highlight the email you want to log as a received submittal, then select the drop-down arrow for the **File in Project** button in the **Project Center Add-In for Microsoft Outlook** toolbar. Select **File As** from the drop-down menu.



*If the email is already associated with a submittal, the **File in Project** button is replaced by **File in Submittal**.*

- In the **Select Project dialog box**, double-click on the corresponding project to select it.
- In the **File As dialog box**, select the **New Item** radio button and **Submittal** from the **Project Item Type** list to log a new submittal. Select **Log a Received Submittal** in the **Log a Submittal dialog box** and select **OK**. Complete the information in the **Log a Received Submittal dialog box** as needed.

To log a received submittal from Info Exchange

You can give external users access to your Info Exchange site so they can send you submittals directly from Info Exchange.

*See the **Project Team Overview** for more information on granting external users access to Info Exchange.*

1. You will receive an email notification that a submittal has been sent to you through Info Exchange. Follow the link in the email to the **Submittals** activity center.

Submittal Received: Bathroom lighting - Alpengrove Environmental Science Center
 @newforma.com
 Sent: Wed 5/28/2014 4:08 PM
 To:

A Submittal has arrived through Newforma - Info Exchange. Select the link below to receive the Submittal.

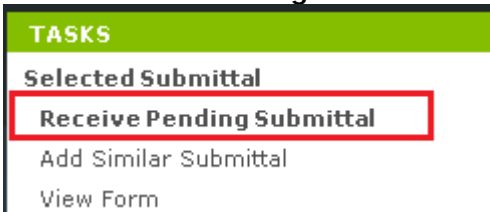
[View the Submittal in Newforma Project Center](#)

Additional links:

[Sign in to the Newforma - Info Exchange site](#)

Project Name: Alpengrove Environmental Science Center

2. Select **Receive Pending Submittal** from the **Tasks** panel.



3. Select **Log a Received Submittal** in the **Log a Submittal dialog box** and select **OK**.
4. Complete the information in the **Log a Received Submittal dialog box** as needed.

To log a received submittal from the Submittals activity center

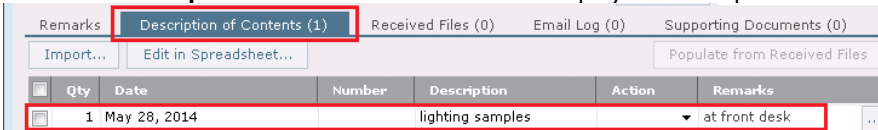
You can also log a received submittal directly through the **Submittals** activity center. Use this option to log documents received in hard copy or physical samples.

Download or scan files needed in the submittal before logging the submittal.

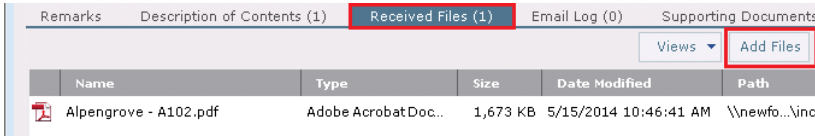
1. In the **Submittals** activity center, select **New Submittal > Log Received Submittal** from the **Tasks** panel.



2. Complete the information in the **Log a Received Submittal dialog box** as needed.
3. Use the **Description of Contents** tab to track physical samples and items.



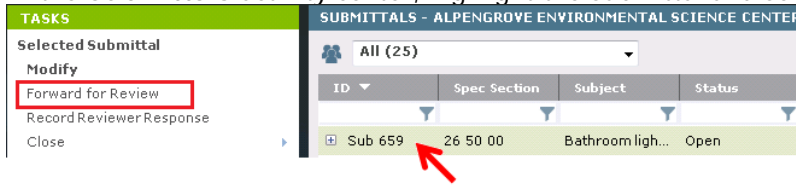
4. You can add scanned files or files downloaded from another site to the **Received Files** tab.



To forward a submittal for review

Submittals can be forwarded for review to multiple internal and external reviewers.

1. In the **Submittals** activity center, highlight the submittal and select **Forward for Review** from the **Tasks** panel.



2. Select any files to send to the reviewers in the **Select Files to Forward for Review dialog box** and select **OK**.

*Internal reviewers see all associated files when they view the submittal through the **Submittals** activity center so forwarding files may not be necessary.*

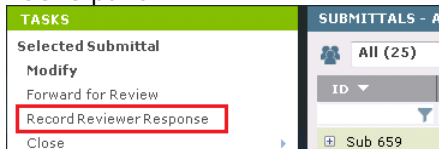
3. Complete the information in the **Forward Submittal for Review dialog box** as needed.

If you choose to send via email, Newforma prepares a notification email. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send.

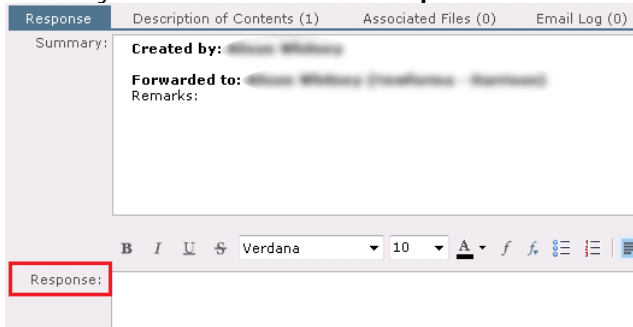
To record a reviewer response in the Submittals activity center

Reviewers' responses can be recorded in the Submittals activity center from email or from a response sent through Info Exchange.

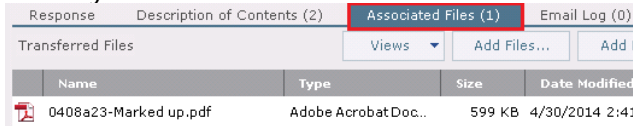
1. In the **Submittals** activity center, highlight the submittal and select **Record Reviewer Response** from the **Tasks** panel.



2. Record your comments in the **Response** box on the **Response** tab.



3. Add any files to the **Associated Files** tab.

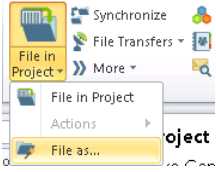


4. Select **Record Response** when done.

To record a reviewer response from email

When a reviewer responds to a submittal via email, you can record the response directly from Outlook.

1. In Outlook, highlight the email you want to log as a reviewer response, then select the drop-down arrow for the **File in Project** button in the **Project Center Add-In for Microsoft Outlook** toolbar. Select **File As** from the drop-down menu.



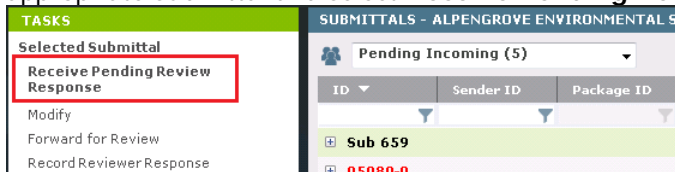
*If the email is already associated with a submittal, the **File in Project** button is replaced by **File in Submittal**.*

2. In the **Select Project dialog box**, double-click on the corresponding project to select it.
3. In the **File As dialog box**, select **Reviewer Response** and select **Submittal** as the **Project Item Type** to pick from the list of expected submittals in the **Choose Project Item dialog box**. Complete the information in the **Record Reviewer Response for Submittal dialog box** as needed.

Record a reviewer response from Info Exchange

Reviewers can respond to a submittal through Info Exchange. You will receive an email notifying you of the response.

1. In the **Submittals** activity center, select **Pending Incoming** from the category drop-down list. Highlight the appropriate submittal and select **Receive Pending Review Response** in the **Tasks** panel.

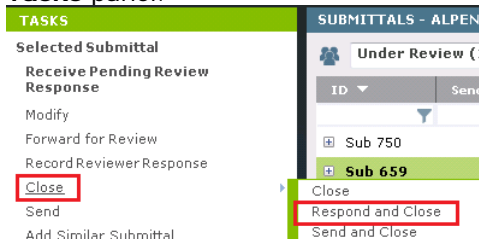


2. Complete the information in the **Record Reviewer Response for Submittal dialog box** as needed.

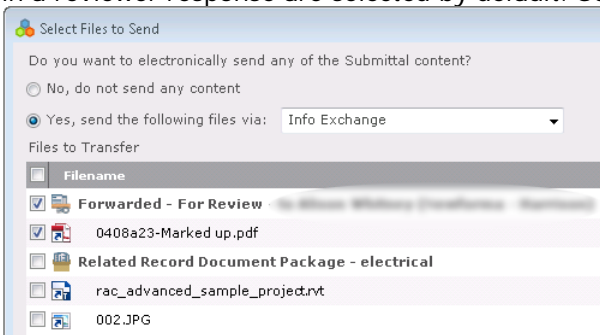
To respond and close

Use this option to track your response to the submittal and close it within Newforma.

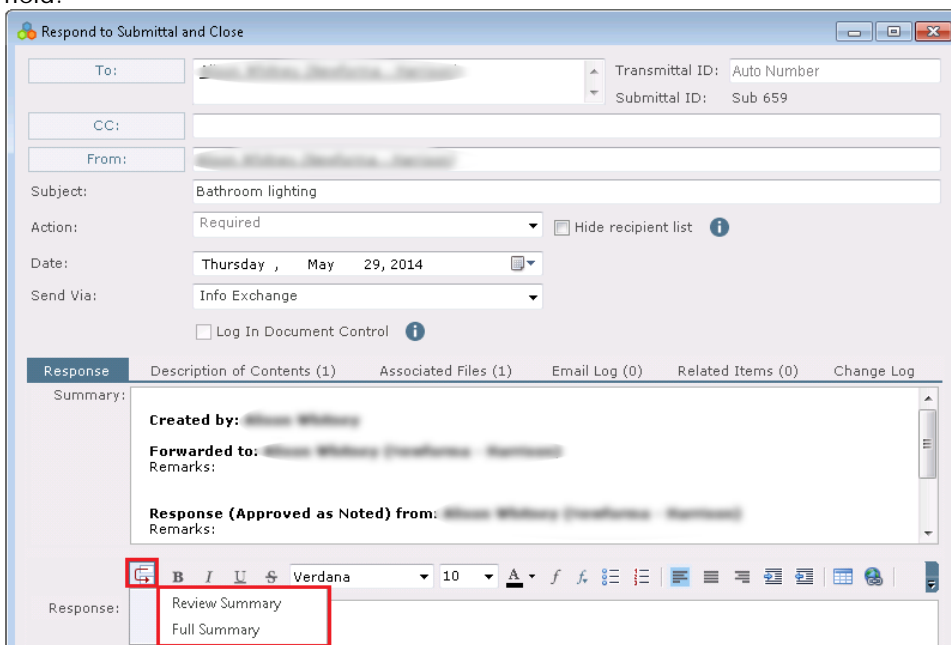
1. In the **Submittals** activity center, highlight the submittal and select **Close > Respond and Close** from the **Tasks** panel.



- In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Select **OK**.



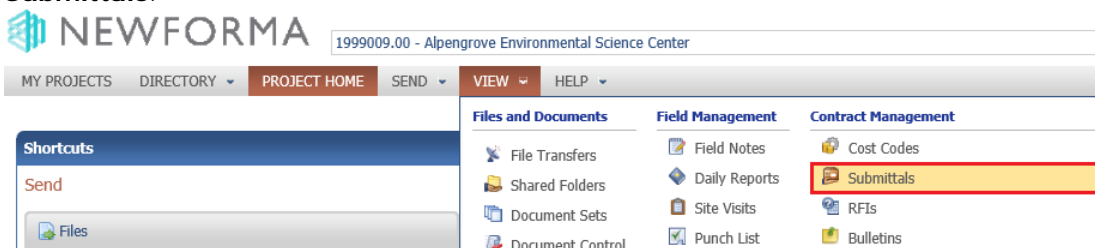
- Complete the information in the **Respond to Submittal and Close dialog box**. You can use the response widget to copy a full summary of the submittal activity or just a summary of the reviewer responses in the **Response** field.



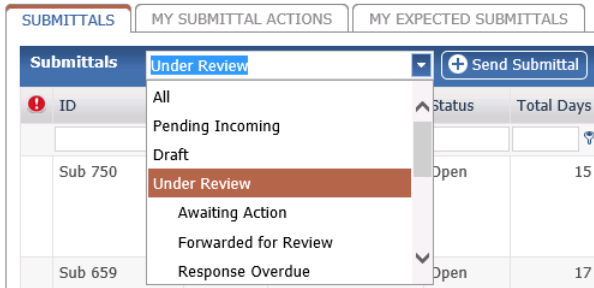
To view submittals on Info Exchange

Internal and external users can see the [Submittals log](#) on Info Exchange. By default, external users only see items in the workflow that they sent or received.

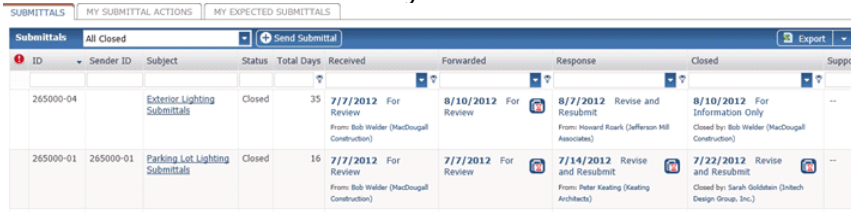
- Log into the Info Exchange website and select the project, then select **View > Contract Management > Submittals**.



- You can use the **Submittals** category drop-down list to filter the list of submittals by status.



- You can view the workflow for any submittal item.



- You can easily respond to items from Info Exchange.



- When you need to access the data in different formats you can export to a variety of file formats.

