

# 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

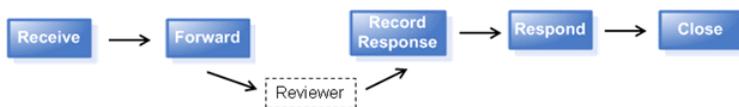
Architects, engineers, construction professionals and owners.

## 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.



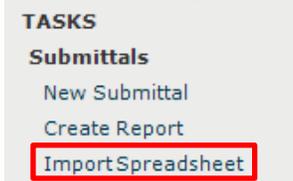
### To import expected submittals

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\Twelfth 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\Twelfth 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 image shows a screenshot of the 'SUBMITTALS - ALPENGROVE SCIENCE CENTER 24 (19990)' activity center. A dropdown menu shows 'Expected (8)'. Below it is a table with columns 'ID', 'Sender ID', and 'Spec Section'. One row is visible with ID '8675309-001a' and Sender ID '8675309'.

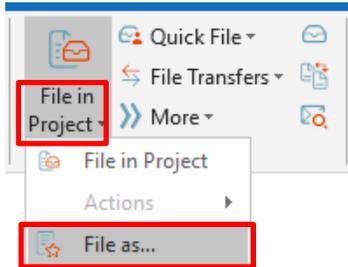
ID	Sender ID	Spec Section
8675309-001a	8675309	

### 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 dropdown 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.

To Adam Klose 24

Project: 1999009.24 **Alpengrove Science Center 24**

Notification about Submittal **Door Hardware**

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

View the Submittal in Newforma Project Center

Download all files

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

### TASKS

Selected Submittal

**Receive Pending Submittal**

Add Similar Submittal

View Form

Send email about Submittal

Delete

3. Select **Log a Received Submittal** in the **Log a Submittal dialog box** and click **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.

Remarks	Description of Contents (1)	Received Files (0)	Email Log (0)	Supporting Documents (0)	
Import...	Edit in Spreadsheet...	Populate from Received Files			
Qty	Date	Number	Description	Action	Remarks
<input type="checkbox"/>	1	April 3, 2020		lighting samples	at front desk

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

Remarks	Description of Contents (1)	Received Files (1)	Email Log (0)	Supporting Documents (0)	Rela	
					Views ▾	Add Files
Name	Type	Size	Date Modified	Path		
Product_Data.pdf	PDF File	942 KB	8/14/2019 8:36:50 PM	\\JMA-D...agement		

### 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.

TASKS
Selected Submittal
Modify
<b>Forward for Review</b>
Record Reviewer Response
Close
Send
Add Similar Submittal
View Form
Send email about Submittal
Delete

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

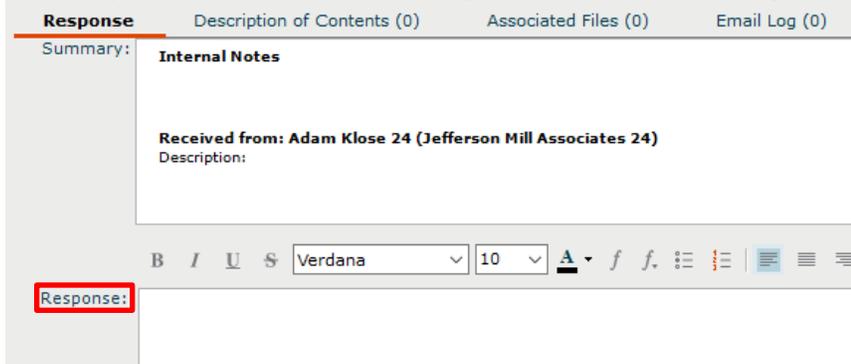
## To record a reviewer response in the Submittals activity center

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

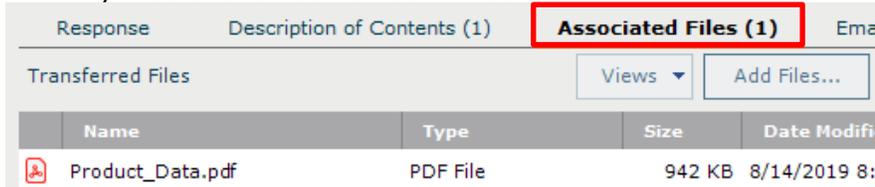
1. In the **Submittals** activity center, highlight the submittal and select **Record Reviewer Response** from the **Tasks** panel.



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 dropdown 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.



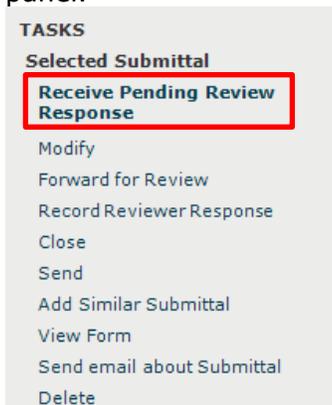
*If the email is already associated with a submittal, the **File in Project** button is replaced by **File in Submittal**.*

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.

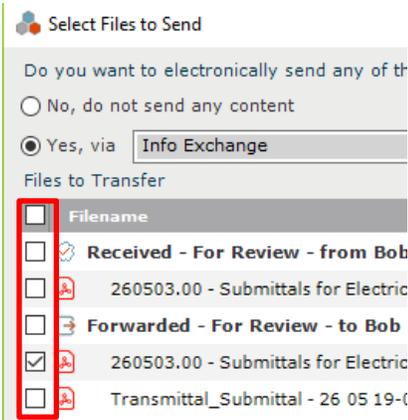
## To respond and close

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

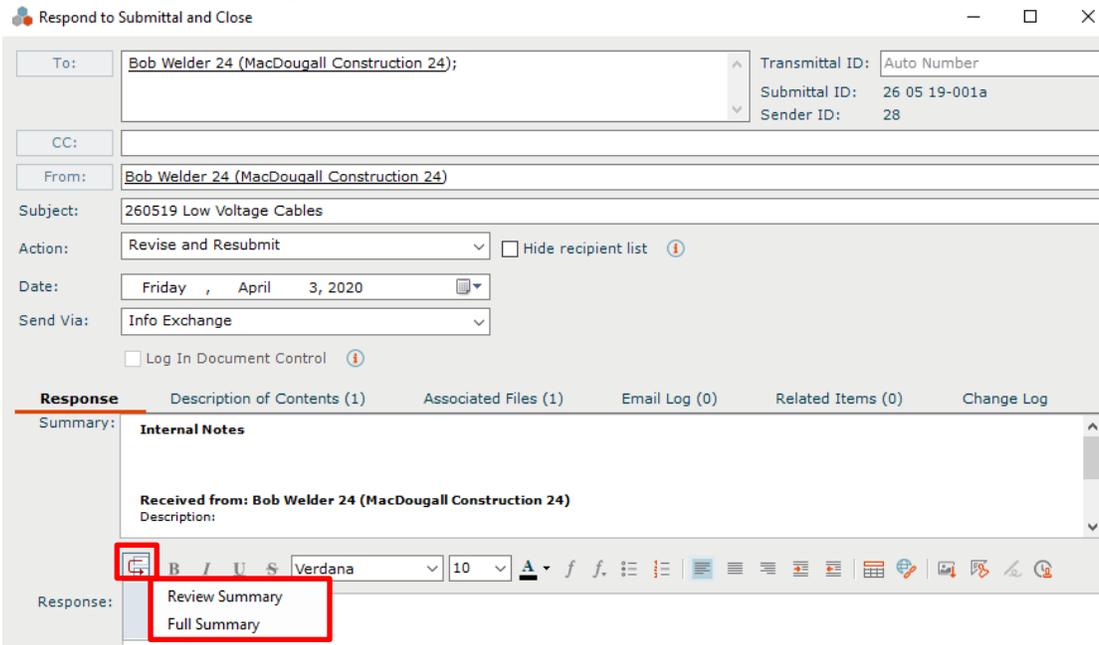
1. In the **Submittals** activity center, highlight the submittal and select **Close > Respond and Close** from the **Tasks** panel.



2. 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. Click **OK**.



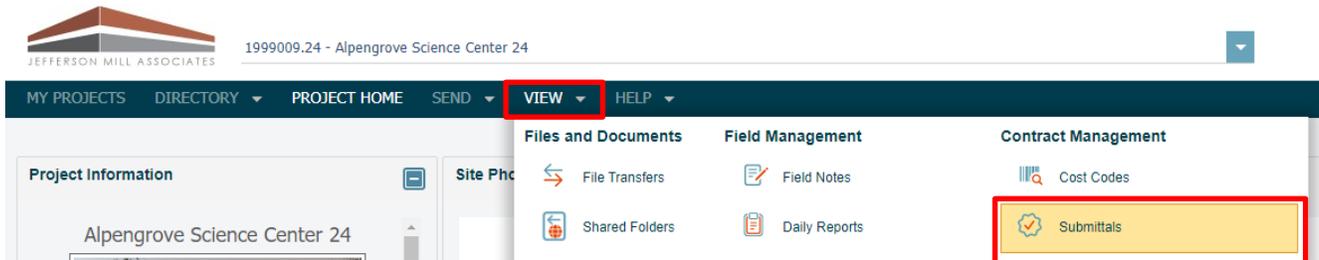
3. Complete the information in the **Respond to Submittal and Close dialog box**. You can use the response widget to copy a full summary of the submittal activity or just a summary of the reviewer responses in the **Response** field.



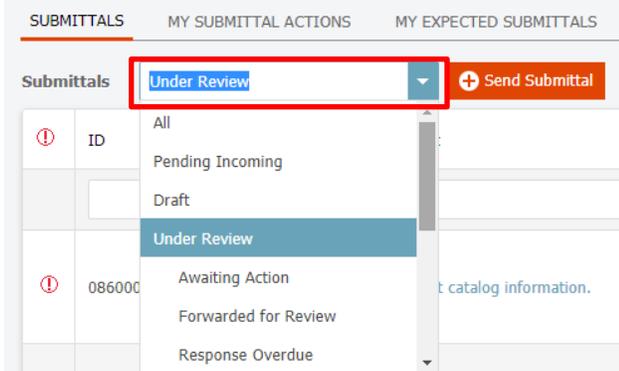
## To view submittals on Info Exchange

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.

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



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



3. You can view the workflow for any submittal item.

ID	Sender ID	Subject	Status	Total Days	Received	Forwarded	Response	Supporting Documents	Related Items
086000-01		Skylight catalog information.	Open - Overdue	2,881	6/8/2012 No Action Required From Bob Welder 01 [bwelder01@macdougall.com]	2/19/2020 For Review	2/19/2020 Pending From: Bob Welder 24 (MacDougall Construction 24)	-	TASKS

4. You can easily respond to items from Info Exchange.

ID	Sender ID	Subject	Received	Forwarded	Response	Supporting Documents	Related Items
08100-01	08100-01	Doors and Window Jambs - spec section 08100		8/22/2019 For Review		-	TASKS
08 10 00-003		Submittal 081000 Door Hardware		9/12/2019 For Review	Respond	-	TASKS

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

