

Design Team Leader Submittal Review Quick Reference Guide

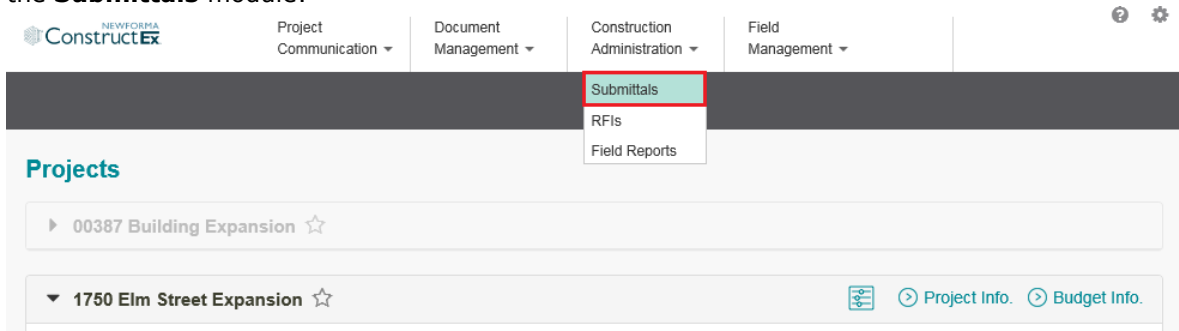
Design Team leaders can review submittals on the Newforma ConstructEx web-based platform in order to return the documentation to Construction Team members. Design Team leaders include architects, engineers, and others depending on the project workflow. To review a submittal, follow the steps below:

Arrive at the Submittals Module

1. Log into ConstructEx to access the **All Projects** page.

*The first time you log in you will be prompted to complete your profile information. Once your profile is complete you are directed to the **All Projects** page.*

2. Select the desired project by clicking the project name.
3. Expand the **Construction Administration** dropdown menu at the top of the page and select **Submittals** to open the **Submittals** module:



View Submittals to Review

NEWFORMA
ConstructEX

Project Communication | Document Management | Construction Administration | Field Management

keyword or number

AESC (Construction) All Projects

Submittals Summary Stats Graphs + ADD SUBMITTAL

Results 1 - 51 of 51 Results Per Page: 1000

To Review (sorted by Due)

Number	Title	Issued	Due	Returned	Status
033100-0005-00	Structural Concrete	11/09/2015	11/23/2015	N/A	Pending - Open
053100-0007-00	Steel Decking - Second Floor	11/09/2015	11/23/2015	N/A	Pending - Open

▼ SUBMITTAL LOGS

- To Review
- Overdue + Next 7 days
- All Overdue Expected Submittals
- All
- Substitutions

1. Select the **To Review** log from the **Logs** section in the right panel of the **Submittals** module.
2. Select the name of the submittal you want to open.

Forward a Submittal to Secondary Reviewers

1. On the **View Submittal page**, scroll down and select **Forward** to open the **Forward Submittal page** to select the secondary reviewers you want to invite to review the submittal.

1750 Elm Street Expansion

[Summary](#)
[Stats](#)
[Graphs](#)

Forward Submittal

Name	Company	Delivery Method	Copies	Email Due Date
<input type="checkbox"/> Select/Unselect All				
<input checked="" type="checkbox"/>	Newforma	Electronic Review	0	<input checked="" type="checkbox"/> 11/16/2015
<input type="checkbox"/>	Sims Corporation	N/A	N/A	<input type="checkbox"/> 11/16/2015
<input checked="" type="checkbox"/>	Sims Corporation	Electronic Review	0	<input checked="" type="checkbox"/> 11/16/2015
<input type="checkbox"/>	N/A	N/A	N/A	<input type="checkbox"/> 11/16/2015
<input checked="" type="checkbox"/>	N/A	Electronic Review	0	<input checked="" type="checkbox"/> 11/16/2015

Transmittal Notes

Transmittals should only be used when forwarding samples or hardcopy submittals. The notes only appear on the transmittal. All submittal comments should be added within the review comments field.

Notify Design Team via Email

Choose

 Architect(s) [Add/Edit Notification Users](#)

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SAVE

SAVE AND PRINT TRANSMITTAL TO REVIEWER

Important: Pop-up blocker must be disabled for this site to create a PDF transmittal. See your browser preferences for disabling pop-up blocker for this site only.

2. On the **Forward Submittal page**, select the checkboxes for any reviewers you want to review the submittal. In most cases, the default settings of **Electronic Review** as the **Delivery Method** with **0 Copies**, **Email** selected and the default **Due Date** are used. For samples or hardcopy submittals, adjust the settings as needed.

Secondary reviewers can view, but cannot comment on a submittal until it is forwarded to them. If they are not automatically invited to review the submittal based on module configuration, you must invite them manually.

3. Enter **Transmittal Notes** if you are sending samples or hardcopy submittals.
4. To notify another Design Team leader when the submittal is forwarded to the reviewers, select the **Add/Edit Notification Users** link and select team members as needed.
5. Select **Save** to notify all selected parties. If you are sending samples or hardcopies, select **Save and Print Transmittal to Reviewer**.

Return a Submittal to the Contractor

Submittals

Results 1 - 20 of 85

Results Per Page: 20

Summary

Stats

Graphs

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All Open (sorted by Issued)

Number	Title	Issued ▲	Due	Returned
⊙ 033100-0005-00	Structural Concrete	11/09/2015	11/23/2015	N/A
⊙ 053100-0007-00	Steel Decking - Second Floor	11/09/2015	11/23/2015	N/A

1. Select the submittal you want to return from the **All Open** log. Items are marked with the ⊙ icon when all secondary reviewers have responded.

Hover over any icon for additional information about the submittal status.

2. Scroll down and select **Return** on the **View Submittal page**.

*Select **Edit** if you need to change any submittal data, including adding markups, before returning it to the construction team.*

Submittals

Summary

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Graphs

Return Submittal

Submittal: 033100-0005-00 - Structural Concrete	
Review Status*	<input type="text" value=""/> ▼
Reviewed By	<input type="text" value=""/>
Number of Copies Returned	1 ▼
Date Returned*	11/10/2015 <input type="text" value=""/>
Trade/Discipline	Structural
Category	N/A

3. Select a **Review Status** from the dropdown menu. Enter your name in the **Reviewed By** field. In most cases the **Number of Copies Returned** and **Date Returned** values are left at their defaults, but you can change them if needed.

Substitution No ▾

Substitution Accepted ▾

Submittal Notes

(Submittal notes are not visible to consultant, owner, contractor, or subcontractor users at any time.)

Drop files here or

Upload file types JPG, PDF, DWF, DWG, or TIF. Maximum file size is 100MB per attachment.

Existing Attachments Hide


00348-A-000.pdf	11/06/2015	Project Admin (Contractor) - Alison Whitney	<input type="button" value="+ ADD MARKUPS"/>	<input type="checkbox"/>
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- If the item is a substitution, select **Accepted** or **Not Accepted** in the **Substitution Accepted** field.
- You can attach additional documents to the submittal before returning it to the construction team. Drag and drop PDF(s) of the submittal documentation to the **Drop Files Here** section of the page to upload them. Alternately, you can select **Browse** to browse for the files. Some older browsers do not support drag and drop. If configured, the system automatically adds the project's cover sheet to the upload.


*In Chrome, **Browse** is replaced by **Choose File**.*


- The **Existing Attachments** section includes any document uploaded to the submittal. Select **Add Markups** to view the design team markups or to add any final design team markups. If the entire review team uses the markup tool, the result is a single marked-up document. All design team markups are flattened when the submittal is returned to the construction team. To view a brief video tutorial on using the markup tools, click [here](#).

To simply view the document, select the document name.

References 		
Construction Phase Docs	LINK	None
Design/Bid Packages	LINK	None
Sheets	LINK	None
Specifications	LINK	None
Reports	LINK	None
Submittals	LINK	None
RFIs	LINK	None
Field Reports	LINK	None
Meeting Minutes	LINK	None
Messages	LINK	None
Pay Applications	LINK	None

Review History 		Hide
11/09/2015	Project Admin (Design) - Alison Whitney	
11/09/2015	Reviewer - Renaldo Rodriguez	<input type="checkbox"/>
	no additional changes	
11/06/2015	Project Admin (Contractor) - Alison Whitney	

Review Comments 
<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
<small>Review comments provided by the design team are hidden from the construction team when the submittal is "open". Review comments provided by the construction team are visible when the submittal is "open" or "returned". Review comments do not appear on transmittals.</small>


RETURN RETURN WITH NOTIFICATION CANCEL

7. Cross reference any ConstructEx items as needed.
8. Read the **Review History** to view all previous review comments.
9. Enter your final **Review Comments** as needed.
10. Select **Return With Notification** if you are ready to return the submittal to the contractor. The contractor is notified of the return of the submittal and it is now their responsibility to act on it as needed.

*Best practice is to use the **With Notification** option whenever it is available. Returning items without notifications does not alert the team that the item has moved forward in the workflow and may delay the process. Only use **Return** or other non-notification options when notification is not desired.*