

Create Cover Sheets Quick Reference Guide

Cover sheets can be used within the Newforma ConstructEx system to display data for accompanying submittals, RFIs, and construction phase packages. You can either use a Newforma cover sheet template to which you can add your logos and stamps, or you can create a custom cover sheet in your traditional format. We encourage users to use the Newforma templates as a base, as their language directly correlates to the language and information in the software.

This guide takes you through the following steps in creating cover sheets:

- **Choose the right cover sheet template**
- **Add logos to a cover sheet**
- **Add stamps to a submittal cover sheet**
- **Populate information fields on a cover sheet**
- **Upload your cover sheet to Project Cloud**
- **Create a custom cover sheet**
- **Cover sheet troubleshooting**

Select and Prepare your Editing Tool

You can edit cover sheets with any PDF editor that allows you to add images and includes form field editing capabilities. Adobe Acrobat Pro DC is used for the screen shots included in this document.

Prior to starting, ensure that the **Prepare Form** and **Edit PDF** tools are available.

Choose the Right Cover Sheet Template

Standard ConstructEx cover sheet templates can be downloaded from the Help site in the following location:

http://help.newforma.com/Newforma_Project_Cloud/desktop/Overviews/Sample_Cover_Sheet_Documents.htm

Following is a description of each of the cover sheet templates.

Submittal Cover One Page Without Design Team Review

This cover sheet can be used when:

- No stamps are desired
- Only the contractor stamp is desired
- The design team prefers not to use the integrated markup tools

This cover sheet should not be set to update upon return to the contractor, as none of the information will change after it is submitted.

Submittal Cover One Page With Design Team Review

This cover sheet can be used when:

- No stamps are desired
- Only the design team's stamp is desired
- Both a contractor and a design team's stamps are used

This cover sheet has additional fields that populate with information from the design team, so it should be set to update upon return.

Submittal Cover Two Page With Design Team Review

This cover sheet is the same as the Submittal Cover One Page With Design Team Review, but has a second page added for **Review Comments** and **References**. The **Review Comments** field populates with all comments entered by all members of the team and notes which team member added the comment.

RFI Cover

Most project teams choose to use the **Print Summary** option in the software to create their RFI synopsis sheets. If this is not desired, the standard two-page RFI cover sheet template can be used.

Construction Phase Document Package Covers

The two construction phase cover sheets are identical with the exception of the **Adjustments** section. If your construction phase document package includes adjustments and you want that information on the cover, use the **Adjustments** cover.

Add Logos to a Cover Sheet

When adding logos to the cover, it is best to use an original logo file if available. It will retain better resolution than the 233x78.png company logo files referenced in the [Create Company and Project Logos Quick Reference Guide](#) and [video](#).

1. Open the standard cover sheet template in the PDF editor.
2. Select the **Edit PDF** tool from the **Tools** sidebar.
3. Click **Add Image** in the **Edit PDF** toolbar. Navigate to the location of your digital logo file.



4. Once the file is open, click and drag to place and size the logo.
5. Repeat the process to insert any additional logos as needed. Make sure logo files do not overlap and are roughly the same size.

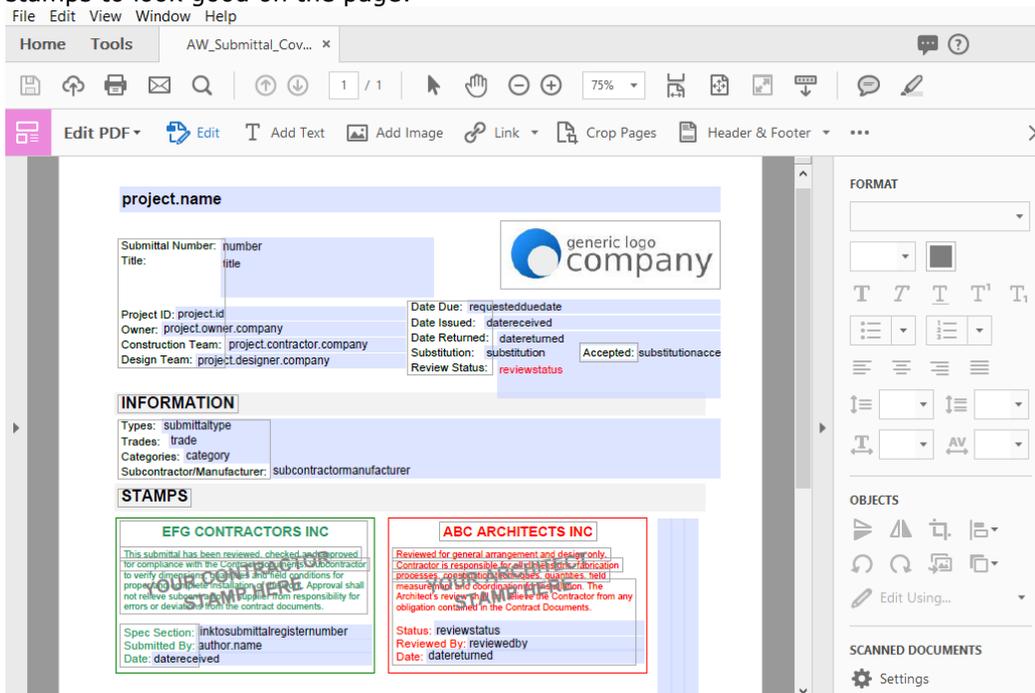
Add Stamps to a Submittal Cover Sheet

If you are not working on a submittal cover sheet, proceed to the next section: **Populate**

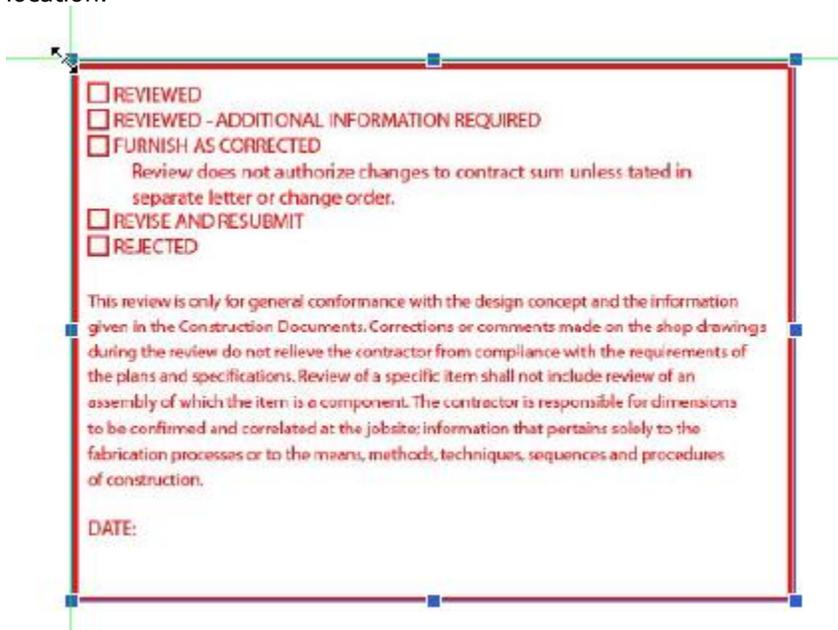
Information Fields on a Cover Sheet.

A contractor's stamp and a design team's stamp can be added to a submittal cover sheet. Other stamps can be added, but it is important to note that the submittal cover sheet is applied to all submittals for a project. In most cases, it is not appropriate to have additional stamps on the cover sheet.

1. Use **Add Image** to select the desired stamp file or files. Drag and drop the contractor stamp to the left side of the sheet. If you are also adding the design team stamp, drag and drop it on the right side of the sheet. Align the stamps to look good on the page:



2. Note that if a stamp is in a PDF file format, it cannot be uploaded directly to Adobe Acrobat Pro DC. You will need to take a screenshot of the PDF in order to import it:
 - a. Open the stamp PDF in Adobe Reader.
 - b. A screen snapshot works best if you enlarge your screen view to at least 150% to capture a good screen resolution of the stamp.
 - c. On the dropdown menu, select **Edit > Take a Snapshot**.
 - d. Select as close as you can around the edge of the stamp to capture just the stamp image.
 - e. Go back to Adobe Acrobat Pro DC and press **CTRL+V** to paste the stamp image onto the cover sheet.
 - f. Resize the image as needed using the blue squares, shown below. Click and drag the stamp to the desired location.



Populate Information Fields on a Cover Sheet

You can map information on the cover sheet to automatically populate with ConstructEx document information using form fields. Use Adobe Acrobat Pro DC to either create a new form field text box or copy an existing field as shown below.

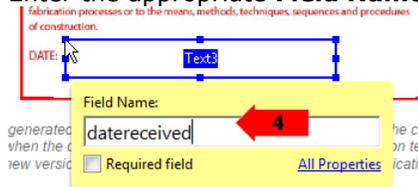
Note that a list of valid form fields is included in [Appendix A](#).

To create a new form field

1. Select **Prepare Form** in the **Tools** sidebar.
2. Click the **Add a Text Field** icon in the **Prepare Form** toolbar:



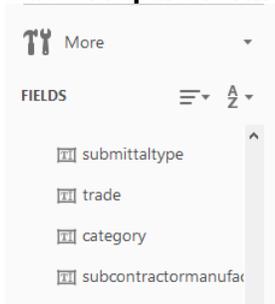
3. Place the field in the correct position and adjust the size and shape as needed.
4. Enter the appropriate **Field Name** by copying the text exactly as it appears in [Appendix A](#):



5. Select the **All Properties** link, then format the text as desired on the **Appearance tab** in the **Text Field Properties dialog box**.

To copy an existing form field

1. Select **Prepare Form** in the **Tools** sidebar. Existing fields are listed:



2. Select the existing field you want to copy either by selecting the field from the **Fields** list or by selecting the field directly on the form.
3. Press **CTRL+C** to copy the field.
4. Press **CTRL+V** to paste the field onto the form. Click and drag it to the desired location.
5. Double-click on the field to edit it.
6. On the **General tab**, enter the appropriate field **Name** by copying the text exactly as it appears in [Appendix A](#).
7. Format the text as desired on the **Appearance tab**.

Upload Your Cover Sheet to ConstructEx

Once your cover sheet is complete, you can upload it. Each type of cover sheet is uploaded to its own location in the software.

To upload submittal cover sheets

Submittal cover sheets are uploaded via the **Submittal Module Configuration** screen's **Submittal Cover Sheet** section:

Submittal Cover Sheet

Please contact Newforma ConstructEx staff at cloudsupport@newforma.com prior to adding or editing the PDF coversheets.

Instructions: A PDF cover sheet can either automatically be applied to the front of each uploaded submittal PDF or created as a separate attachment. Upload the formatted PDF to be included.

A cover sheet already exists ([Click here to view it](#)). To add a new cover sheet, first [delete the existing cover sheet](#). **1**

Merge cover sheet with PDFs uploaded by construction team **3**

Update cover sheet when the design team returns submittal to the construction team

4 **SAVE SETTINGS**

1. Select **Delete the Existing Cover Sheet** to remove the existing cover sheet.
2. Select **Choose File** to navigate to and select the cover sheet file to upload.
3. Read the options for cover sheet behavior and select the appropriate checkboxes. For example, if the cover sheet includes an architect review field, select the **Update Cover Sheet When the Design Team Returns Submittal to the Construction Team** option.
4. Select **Save Settings** at the bottom of the **Submittal Cover Sheet** section to save your changes.

To upload RFI cover sheets

RFI cover sheets are uploaded via the **RFI Module Configuration** screen's **RFI Cover Sheet** section. The process is similar to uploading submittal cover sheets.

1. Select **Delete the Existing Cover Sheet** to remove the existing cover sheet.
2. Select **Choose File** to navigate to and select the cover sheet file to upload.
3. Read the options for cover sheet behavior and select the appropriate checkboxes. Most teams do not elect to merge the RFI cover. If the **Answer** field is used on the cover, select the **Update Cover Sheet When the Design Team Returns RFI to the Construction Team** option.
4. Select **Save Settings** at the bottom of the **RFI Cover Sheet** section to save your changes.

To upload construction phase document package cover sheets

Construction phase document package cover sheets are uploaded via the **Construction Phase Documents Module Configuration** screen's **Document Types** section:

Document Types

Abbreviation	Description	Cover Sheet	Legal Text	Access	Contract Adjustment
AA	Architects Advice	Cover Sheet Exists. Delete	[edit text]	[permissions]	<input type="text"/>
ASI	Architectural Supplemental Infor	Cover Sheet Exists. Delete	[edit text]	[permissions]	Both <input type="text"/>
CCD	Construction Change Directive	Cover Sheet Exists. Delete	[edit text]	[permissions]	Both <input type="text"/>
CO	Change Order (approved chang	<input type="text"/> Browse...	[edit text]	[permissions]	Both <input type="text"/>
NEW	New	<input type="text"/> Browse...	[edit text]	[permissions]	<input type="text"/>
PCO	Potential Change Order	<input type="text"/> Browse...	[edit text]	[permissions]	Both <input type="text"/>
PR	Proposal Request (proposed ch	<input type="text"/> Browse...	[edit text]	[permissions]	Both <input type="text"/>
SCON	Subcontractor Contract	<input type="text"/> Browse...	[edit text]	[permissions]	Approved <input type="text"/>
SI	Site Instruction	<input type="text"/> Browse...	[edit text]	[permissions]	<input type="text"/>
(add)	(add new description)	<input type="text"/> Browse...	[edit text]	[permissions]	<input type="text"/>



1. For each document type, select **Browse** in the **Cover Sheet** field to navigate to and select the cover sheet file to upload.

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

2. Select **Save Settings** at the bottom of the **Document Types** section to save your changes.

Create a Custom Cover Sheet

While we encourage using the ConstructEx Cover Sheet templates because the language correlates directly with the language used in the software, custom covers can be created. A custom cover sheet can be used for any cover type in ConstructEx.

One challenge with creating custom cover sheets is that the information on the cover sheet has to be replicated using only the information available in the software. Before you create a custom cover sheet, consider the following items:

- Only items from [Appendix A](#) can be used as form fields on custom covers.
- Not all information can be auto-populated with form fields. Some must be manually filled out by users with the ConstructEx markup tools.
- As a best practice, we recommend deleting cover sheet fields that cannot be auto-populated, unless they are highly important. Each field that must be manually marked up costs the team time.

To create a custom cover sheet

1. Start with a PDF file of the cover sheet you want to recreate as a base file.
 - It is best to use a clean blank cover sheet document as a base file.
 - If exporting the cover sample to a PDF file from another program, be sure to print it as a PDF instead of saving as a PDF. This avoids future formatting complications in the software.
2. Once you have your base PDF file, open it in Adobe Acrobat Standard.
3. Follow the directions to [Populate Information Fields on a Cover Sheet](#).

Cover Sheet Troubleshooting

- If a project has existing submittals and the cover sheet is set to update upon return, we recommend that all submittals are closed before uploading a new cover sheet. If a user marked up a cover sheet and it is swapped out upon return, it may change the intent of their notations.
- If a project has existing submittals, is set to update upon return and has a single page cover sheet, we recommend that you do not replace the single page cover sheet with a multipage cover sheet. Again, we recommend closing out all existing submittals before uploading a new cover sheet. If items are not closed out and they are marked up, the markups will be shifted and will appear on the wrong page.
- If a cover sheet is removed from the system and re-uploaded during the review process, the fields are no longer mapped and will not update. An example of this behavior is if a consultant downloads a submittal, marks it up and re-uploads it - the mapped field on their attachment will not update.

Note that construction phase document package cover sheets do not update. They are created when the item is first issued and do not change thereafter.

Occasionally, cover sheets are not added to PDFs. Please see the Help article [Cover/Stamp Sheet is not Adding to PDF](#) for more information.

Appendix A

General Fields (Available for all cover sheet types)

Project

- project.id
- project.name
- project.address.addressline1
- project.address.addressline2
- project.address.town
- project.address.region
- project.address.postalcode
- project.owner.company
- project.contractor.company
- project.designer.company

Author

- author.name
- author.company
- author.email
- author.phone

Submittal Specific Fields

- number
- title
- status
- copies
- datereceived
- datereturned
- dateclosed
- submittaltype
- requestedduedate
- trade
- category
- substitution
- substitutionaccepted
- transmittalnumber
- internalarchivingnumber
- submittalnotes
- reviewstatus
- reviewcomments
- reviewedby
- linktosubmittalregister
- linktosubmittalregisternumber
- linktosubmittalregistertitle
- subcontractormanufacturer
- daysrequestedforreview
- references
- contractortransmittalnumber

RFI Specific Fields

- number
- title
- subcontractornumber
- datedue
- datesubmitted
- datereturned
- datedueconsultant
- question
- suggestion
- trade
- category
- subcontractormanufacturer
- costimpact
- divisionnumber
- reviewcomments
- references

Construction Phase Document Package Specific Fields

- number
- title
- dateissued
- trade
- category
- description
- sumadjustmentsubmitted
- sumadjustmentaccepted
- timeadjustmentsubmitted
- timeadjustmentaccepted
- references