

Construction Phase Document Package Origination Quick Reference Guide

Design team leaders and contractors have the ability to upload construction phase document packages such as ASIs, CCDs, COs and PCOs into the Newforma ConstructEx web-based platform in order to better manage them during the project's construction phase. To upload a package, follow the steps below:

Arrive at the Construction Phase Documents Module

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

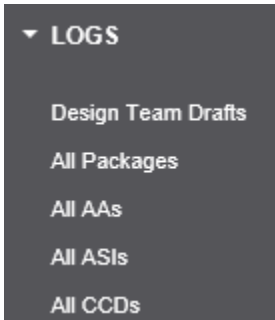
*The first time you log in you will be prompted to complete your profile information. Once your profile is complete you are directed to the **All Projects** page.*

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

The screenshot shows the ConstructEx web interface. At the top, there is a navigation bar with the ConstructEx logo and several dropdown menus: Project Communication, Document Management, Construction Administration, and Field Management. The Document Management dropdown menu is expanded, showing options: Design/Bid Packages, Construction Phase (highlighted with a red box), Sheet Index, Specification Index, Spatial Index, and Shared Folders. Below the navigation bar, the main content area displays a list of projects. The first project is '00387 Building Expansion' and the second is '1750 Elm Street Expansion'. Under the '1750 Elm Street Expansion' project, there is a 'Submittals - All Returned' section with a table of submittals. The table has columns for Number, Title, Issued, Due, Returned, and Status. One submittal is visible with the number 078123-0021-00 and title 'ES-3060 Provide Subcontractor the abili...'. The status is 'Returned - No Exceptions...'. The table also shows 'All Submittals: Opened: 157 Returned: 126'.

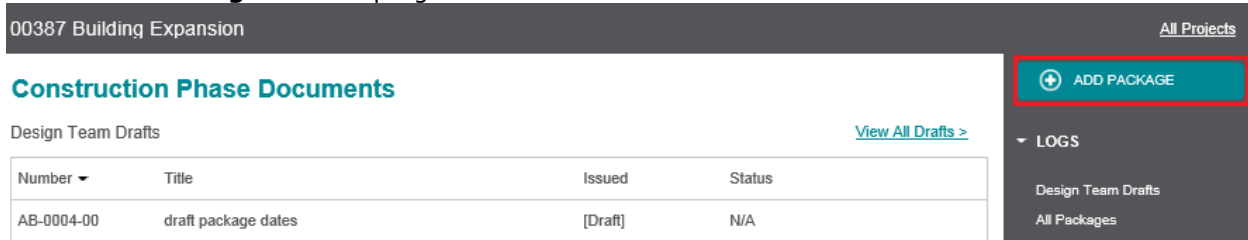
Add a Construction Phase Document Package

Verify that the package type you want to upload is listed in the **Logs** section of the **Construction Phase Documents** module:



If you do not see the package type you need, an administrative user will need to add it in Module Configuration. See [Add/Edit Custom Construction Phase Document Types](#) for more information. Proceed with the following steps after the package type is added.

1. Select **Add Package** at the top right of the **Construction Phase Documents** module:



The screenshot shows the 'Construction Phase Documents' module interface. At the top left, it says '00387 Building Expansion'. At the top right, there is a link for 'All Projects'. The main heading is 'Construction Phase Documents'. Below the heading, it says 'Design Team Drafts' and a link 'View All Drafts >'. A table with columns 'Number', 'Title', 'Issued', and 'Status' is displayed. The table contains one row with the value 'AB-0004-00' in the 'Number' column, 'draft package dates' in the 'Title' column, '[Draft]' in the 'Issued' column, and 'N/A' in the 'Status' column. On the right side, there is a dark grey sidebar menu with a white downward arrow and the text 'LOGS'. Below it are two white text items: 'Design Team Drafts' and 'All Packages'. A red box highlights a teal button with a white plus sign and the text 'ADD PACKAGE' at the top right of the main content area.

Number	Title	Issued	Status
AB-0004-00	draft package dates	[Draft]	N/A

Add a New Package

Package Type*	<input type="text" value="2"/> ASI
Package Number*	<input type="text" value="3"/> 0104 four digits required
Revision Number*	<input type="text" value="00"/> two digits required
Title*	<input type="text" value="4"/>
Issue Date*	<input type="text" value="5"/> MM/DD/YYYY
Description	<input type="text" value="6"/>
Status	<input type="checkbox"/> Contractor Review <input type="checkbox"/> Contractor Approved <input type="checkbox"/> Architect Review <input type="checkbox"/> Architect Approved <input type="checkbox"/> Owner Review <input type="checkbox"/> Owner Approved <input type="checkbox"/> Pricing <input type="checkbox"/> Accepted <input type="checkbox"/> Rejected <input type="checkbox"/> Superseded <input type="checkbox"/> Void <input type="checkbox"/> Closed
Review Required	<input type="checkbox"/>
Trade/Discipline	<input type="checkbox"/> General Requirements <input type="checkbox"/> Life Safety <input type="checkbox"/> Civil <input type="checkbox"/> Landscape <input type="checkbox"/> Architectural <input type="checkbox"/> Interiors <input type="checkbox"/> Structural <input type="checkbox"/> Mechanical <input type="checkbox"/> Electrical <input type="checkbox"/> Plumbing <input type="checkbox"/> Fire Suppression <input type="checkbox"/> Telecommunications <input type="checkbox"/> Signage <input type="checkbox"/> CVI <input type="checkbox"/> Architectural
Category	<input type="checkbox"/> Building 01 <input type="checkbox"/> Building 02 <input type="checkbox"/> Building 03 <input type="checkbox"/> Building 04 <input type="checkbox"/> Building 05

Drop files here or

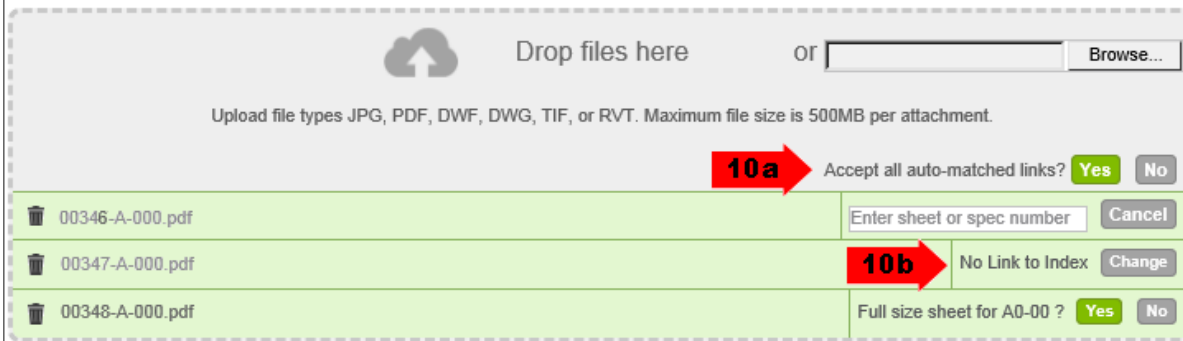
Upload file types JPG, PDF, DWF, DWG, TIF, or RVT. Maximum file size is 500MB per attachment.

[Manage Attachments](#)

2. On the **Add a New Package** page, select the **Package Type**.
3. The system automatically generates a **Package Number** and **Revision Number**.
4. Enter a **Title**.
5. Select the correct **Issue Date**. This is the actual issue date of the drawings/specs. It is not necessarily the same date you are uploading the information.
6. Enter a **Description**.
7. Select the **Status** and whether or not a review is required. Select **Trades/Disciplines** as needed.
8. If present, select the package **Category(s)**. Categories are generally used for different phase or structures within a larger project.
9. Drag and drop documents 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.

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

Attachments and Sheet Linking



Drop files here or Browse...

Upload file types JPG, PDF, DWF, DWG, TIF, or RVT. Maximum file size is 500MB per attachment.

10a Accept all auto-matched links?

00346-A-000.pdf	<input type="text" value="Enter sheet or spec number"/> <input type="button" value="Cancel"/>
00347-A-000.pdf	10b No Link to Index <input type="button" value="Change"/>
00348-A-000.pdf	Full size sheet for A0-00 ? <input type="button" value="Yes"/> <input type="button" value="No"/>

10. The system cross-references both the **Sheet Index** and the **Specification Index** against the names of the uploaded documents and tries to determine a match.
- Select **Yes** to link your drawing or specs to the index. Documents should be linked if they are full-size sheets or full spec sections. In most cases, you should select **Yes** for the **Accept All Auto-Matched Links?** option.

Partial sheet, sketches, and partial spec sections should not be linked. Linking to the index keeps a full set of documents available to the project team. If partial sheets are linked, the full set is no longer linked to the index. Documents that are not reissued drawing sheets or specs, such as PCOs, COs and Proposal Requests should not be linked.

- Select **Change** to manually link to an index.


 Drop files here or

Upload file types JPG, PDF, DWF, DWG, TIF, or RVT. Maximum file size is 500MB per attachment.

Manage Attachments 


Revisions

None

References 

Construction Phase Docs	<input type="button" value="LINK"/>	None
Design/Bid Packages	<input type="button" value="LINK"/>	None
Sheets	<input type="button" value="LINK"/>	None
Specifications	<input type="button" value="LINK"/>	None
Reports	<input type="button" value="LINK"/>	None
Submittals	<input type="button" value="LINK"/>	None
RFIs	<input type="button" value="LINK"/>	None
Field Reports	<input type="button" value="LINK"/>	None
Meeting Minutes	<input type="button" value="LINK"/>	None
Messages	<input type="button" value="LINK"/>	None
Pay Applications	<input type="button" value="LINK"/>	None

11. Select **Manage Attachments** to view your attachments. Include additional items via drag and drop or by browsing for files.
12. Cross reference any related ConstructEx items as needed.


Adjustment to Project Budget 

Requested Contract Sum Adjustment Requested Time Adjustment day(s)

Approved Contract Sum Adjustment Approved Time Adjustment day(s)

Note: Contract Sum and Time Adjustments do not become official until a package is issued. Use a dash-prefix to indicate a negative number.

Notify the Following Users

Notify Users  None [Add/Edit Notification Users](#)

Note: Emails are not delivered when saved as a draft.



13. If the package affects the contract sum or schedule, enter any adjustments in the **Adjustment to Project Budget** section. This section is only visible if the package type is configured to display it.
14. Select **Add/Edit Notification Users** in the **Notify the Following Users** section to select users you want to receive notification about issued sets. Users who are already set up to receive notifications appear in this section.
15. Select **Issue** if you are ready to issue the package. Users in the **Notify Users** list receive an email. If you are not ready to issue the package, select **Save Draft**. You can continue to work on the package at a later time.