Design/Bid Package Origination Quick Reference Guide

Design team leaders and contractors have the ability to upload design/bid packages into the Newforma ConstructEx web-based platform in order to issue the documents and link them to the Sheet and Specification indexes. We recommend that you import your Sheet and Specification indexes before uploading design/bid package documents.

To upload a package, follow the steps below:

Arrive at the Design/Bid Packages 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 **Design/Bid Packages** to open the **Design/Bid Packages** module:
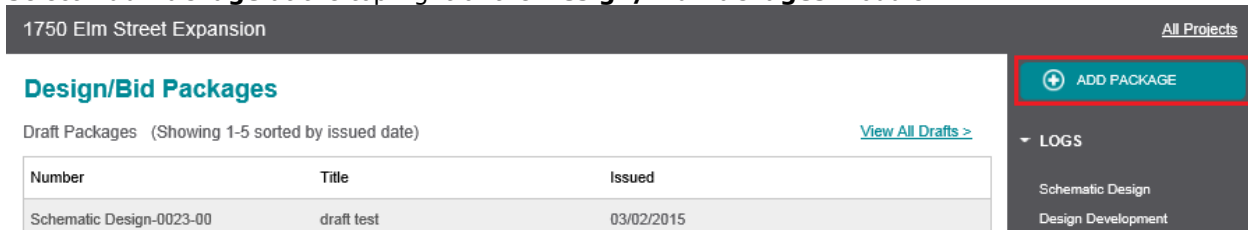
Add a Design/Bid Package

Verify that the package type you want to upload is listed in the **Logs** section of the **Design/Bid Packages** module:
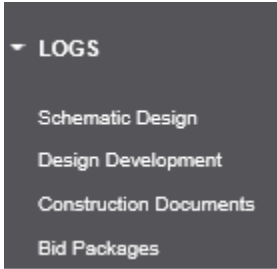
If you do not see the package type you need, an administrative user will need to add it in Module Configuration. See **Add/Edit Custom Design/Bid Package Types** for more information. Proceed with the following steps after the package type is added.

1. Select **Add Package** at the top right of the **Design/Bid Packages** module:

2. The system prompts you to select the document type. Select the desired type, then select **Continue**:

Add a New Document

Select Document Type *	Bid Package ▼	
Document Number*	Bid Package - 0028	four digits required **3**
Revision Number*	00	two digits required
Issue Date*		▦ MM/DD/YYYY **4**
Title*		**5**
Category	☐ Building 01 ☐ Building 02 ☐ Building 03 **6** ☐ Building 04 ☐ Building 05 ☐ Building 06	
Description *Note: for documents that require large amounts of text or AIA documents, it is recommended that the information be saved as a PDF and attached to this item.*		**7**

☁ Drop files here   or [   ] Browse...   **8**

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

Manage Attachments

3. The **Add a New Document page** appears. The system auto generates the **Document Number** and **Revision Number** based on the **Document Type**.

4. 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.

5. Enter a **Title**.

6. If present, select the package **Category(s)**. Categories are generally used for different phase or structures within a larger project.

7. Enter a **Description**. This field can also be used for bidding instructions if you are creating a bid set.

8. 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.

9a → Accept all auto-matched links? Yes No

🗑 00346-A-000.pdf	Enter sheet or spec number Cancel
🗑 00347-A-000.pdf	**9b** → No Link to Index Change
🗑 00348-A-000.pdf	Full size sheet for A0-00 ? Yes No

9. 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.

    a. 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 keep s 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.

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

10. Select **Manage Attachments** to view your attachments. Include additional items via drag and drop or by browsing for files.

11. Cross reference any related ConstructEx items as needed.

12. 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.

13. 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.

14. 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.