

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.

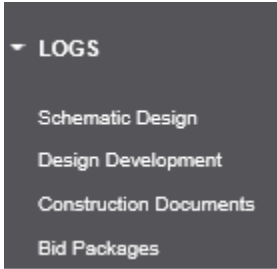
*The first time you log in you will be prompted to complete your profile information. Once your profile is complete you are directed to the **All Projects** page.*

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:

The screenshot displays the ConstructEx web interface. At the top, there is a navigation bar with the ConstructEx logo on the left and four dropdown menus: Project Communication, Document Management, Construction Administration, and Field Management. The Document Management dropdown menu is expanded, showing a list of options: Design/Bid Packages (highlighted with a red box), Construction Phase, Sheet Index, Specification Index, Spatial Index, and Shared Folders. Below the navigation bar, the main content area is titled 'Projects' and lists two project entries: '00387 Building Expansion' and '1750 Elm Street Expansion'. The '1750 Elm Street Expansion' entry is expanded, showing a 'Submittals - All Returned' section with a status of 'All Submittals: Opened: 157 Returned: 126'. There are also icons for 'Project Info.' and 'Budget Info.' next to the project name.

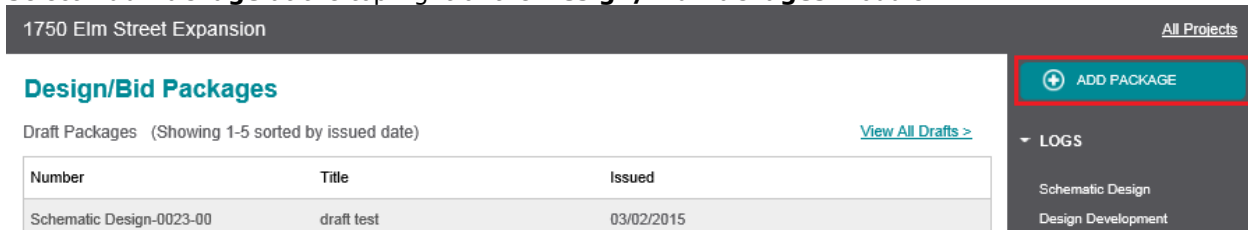
Add a Design/Bid Package

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**:

Design/Bid Packages

Add A New Document

Select Document Type *

- select one
- Schematic Design
- Design Development
- Construction Documents
- Bid Packages

Note: Documents are grouped by document type. Only documents of the same type are visible to all users within your team. Once a document is created, it is visible to all users on the project.

To create a revised document, select the "R" icon next to the existing item from any list.

(* Marked fields required.)



Add a New Document

The screenshot shows a web form titled "Add a New Document". At the top, there is a dropdown menu for "Select Document Type *" set to "Bid Package". Below this are several input fields: "Document Number*" with a value of "0028" and a note "four digits required" (arrow 3); "Revision Number*" with a value of "00" and a note "two digits required"; "Issue Date*" with a calendar icon and a note "MM/DD/YYYY" (arrow 4); "Title*" (arrow 5); "Category" with a list of checkboxes for "Building 01" through "Building 06" (arrow 6); and "Description" with a text area containing a note: "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." (arrow 7). At the bottom, there is a dashed box containing a "Drop files here" area with a cloud icon (arrow 8), a "Browse..." button, and a "Manage Attachments" button. Below the dashed box, it says "Upload file types JPG, PDF, DWF, DWG, TIF, or RVT. Maximum file size is 500MB per attachment."

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?

00346-A-000.pdf	<input type="text" value="Enter sheet or spec number"/> <input type="button" value="Cancel"/>
00347-A-000.pdf	9b <input checked="" type="checkbox"/> No Link to Index <input type="button" value="Change"/>
00348-A-000.pdf	<input type="checkbox"/> Full size sheet for A0-00 ? <input type="button" value="Yes"/> <input type="button" value="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.
- 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 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

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.

Adjustment to Project Budget 			
Requested Contract Sum Adjustment	<input type="text"/>	Requested Time Adjustment	<input type="text"/> day(s)
Approved Contract Sum Adjustment	<input type="text"/>	Approved Time Adjustment	<input type="text"/> 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 <i>Note: Emails are not delivered when saved as a draft.</i>



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.