

## Starting a New Project in Newforma ConstructEx

Welcome! As you work, visit the [Newforma Customer Community](#), where assistance is just a click away. You can also check the [Help Site](#) for more information.

### Tips for Setting up your ConstructEx Project

- Although we have listed the setup tasks in the order of best practice below, your team may complete the tasks in any order (many of them concurrently).
- Most of the modules do require some configurations to be set through the Module Configuration menus. This allows you to customize the software to reflect your project. Project Administrators are responsible for these configurations. Other tasks may be completed by other project team members, so assign tasks to others as necessary.
- Several tasks are optional. If your team does not plan to use a certain feature, disregard the associated task.
- The quickest way to learn is to log into your project and experiment with the features. Test items by uploading information (You can delete all items and documents except Message Forums.) If you need help deleting items, visit the [Newforma Customer Community](#) or check our [Help Site](#).
- Links in the tasks below direct you to additional information in [Help](#).



### The Submittal Register

The Construction Team is typically responsible for creating the register.

You can create the register in two ways:

- ◆ [Create a Submittal Register from the Template](#)

OR

- ◆ Creating a Submittal Register using the [Submittal Register Grid](#)
- ◆ Please refer to the [\(Advantages of Using a Submittal Register\)](#) for additional information.

### The Submittals Module

Configure the Submittals module - [\(Submittals - Module Configuration\)](#).

### The Submittal Cover Sheet

We have several templates which optimize the use of fields in the system.

- ◆ View [Sample Coversheet Documents](#) for more information and to decide on the cover for your project.
- ◆ Submittal cover sheets usually include only the general contractor's stamps and main architect/engineer's stamps [\(Cover Sheet/Stamp Sheets\)](#).

- ◆ Submittal cover sheets can include the general contractor’s logo, main architect/engineer’s logo, project logo or a combination of these logos.
  - ◆ Use the Contact Support button on our [Community](#) site to send any stamps and logos that should display on every submittal. We will include them on your cover sheet. Be sure to include your project name in the description.

**Logos**

- ◆ Add Project Logos to the software - ([Add a Project Logo](#))
- ◆ To link a company logo to all users within your email domain name, send us your company logo and your email domain name by using the Contact Support button on the [Community](#) site.

**Sheets and Specifications**

The Design Team typically creates the indexes.

- ◆ [Configure the Sheet/Specification Indexes](#)
- ◆ Create the Sheet Index in one of two ways –
  - [Create the Specification indexes from the template](#) or view the [Creating a Sheet or Specification Index from the Template video](#)

OR

- [Export Sheet Index Information from Revit](#)
- ◆ [Import a Sheet Index](#) or view the [Importing a Sheet or Specification Index video](#)
- ◆ [Import a Specification Index](#)



**The Document Management Modules**

[Configure the Design/Bid Package module](#)

[Configure the Construction Phase Packages Module](#)

Collect individual PDF files of current drawings and specs.

- ◆ Plan to upload individual PDFs of each drawing sheet and each spec section. View the [Adding a Design/Bid Package](#) and [Adding a Construction Phase Package](#) videos
- ◆ This enables you to [Maintain a Current Set of Drawings and Specifications](#) on the system as individual sheets and spec sections are reissued
- ◆ Collect individual PDFs for past issued sets if needed.

**Configure Additional Modules as Necessary**

Determine which additional modules you will use. Configure the following:

- ◆ View the [Configuring RFIs Module Video](#)
- ◆ Field Reports: [Use Categories](#) for different types of reports (Architectural Field Report, Structural Field Report, Soils Test, Safety, etc.).
- ◆ [Meeting Minutes](#)
- ◆ Message Forums: [Create Message categories](#) as necessary (groups of people that have access to different forums).

### **Congratulations!**

You are ready to start using Newforma ConstructEx. Don't forget that help is available in the [Newforma Customer Community](#) and on our [Help site](#) if you have questions along the way.

Best of luck on your project!