

Maximize the Power of Your Solution

Newforma Learning & Development offers courses designed for everyone on your project team – from new users to seasoned administrators. Your firm will see immediate results in productivity and increased organization of project information with Newforma ConstructEx after the very first training session, and the benefits will increase with each additional course taken.

Benefits of Newforma Training

❖ Enjoy immediate results

Your project will realize an immediate return on investment because your project team will be more confident and productive after the first training. Newforma's experienced training consultants will teach users the basics of Newforma ConstructEx and best practices, so they can start using it immediately to complete their daily work more efficiently.

❖ Increase productivity with knowledge

In each course, users will learn practical examples of how to use Newforma ConstructEx to increase their productivity and communicate with other team members.

❖ Flexible training to meet your team's needs

Because schedules are hectic and team members are often remotely located, Newforma offers multiple training options for your project team.

ConstructEx Training Options

❖ Project-specific Training

Each ConstructEx license includes a training package customized for your project requirements. Our Training Consultant will conduct a short consultation to determine the best approach for training your team. Schedule your **Set-Up & Configuration Training** (for project administrators and decision makers) to learn best practices for configuring the software for your project. Then, schedule the **User Training** (for the entire team) to learn how to use the ConstructEx functions for each user role in the project.

❖ Additional Customized Training

Additional training, customized for your project, may be purchased and scheduled on a date and time that works best for your team. Contact your Newforma account manager for details.

❖ Newforma University On-demand Training

As a Newforma user, you have access our extensive series of on-demand video tutorials and courses. Your team can get the information they need quickly and get back to work. [Join the Newforma Community](#) to access **Newforma University**. You may also access the library of [Video Tutorials](#) from the ConstructEx Help site.

❖ Quick Reference Guides are also available from the [Reference Guides](#) page on the ConstructEx Help site.

Please send a new email to support@newforma.com to schedule your training session.

Course Descriptions

NPCL 200A: Set-Up & Configuration Training Session (60 minutes)

In this instructor-led working session, users will walk through the ConstructEx module set-up and configuration options. Users will learn how to configure their project, including training on the submittal and RFI workflow, adding users, module configuration and best practices. In addition, users will be introduced to Document Management module options including version control through the sheet and specification index tools.

Target Audience: Project Team Leads responsible for decisions regarding workflow and user responsibilities.

Learning Objectives:

Throughout the session, participants will be given the opportunity to ask questions about their specific project and will be guided through the initial set-up of their project.

- ❖ Participants will learn how the Submittal/RFI workflow is structured and how to determine the appropriate ConstructEx roles to assign project team members.
- ❖ Participants will learn how to modify default settings in each module to ensure project contractual requirements are met.
- ❖ Participants will learn how the Document Management modules can be used to share design-phase and construction-phase documents from a central repository. Participants will also learn how the Sheet and Spec Index tools provide version control and history.
- ❖ Participants will learn how the Submittal Register can be used to reduce errors, improve efficiency, and improve overall project management.

Pre-requisites: Review the Welcome Email and [Best Practices for Starting a New Project](#)

Next Steps: A follow-up User Training session is critical for all project team members to attend and learn how to use ConstructEx.

NPCL 210A: Best Practices for ConstructEx Project Set-up & Configuration (60-minute refresher course)

Over the life of a project, team members may change, ConstructEx software releases introduce new functionality, and experienced project team members may want to explore advanced ConstructEx options. In this instructor-led working session, users will walk through the ConstructEx module set-up and configuration options.

Users will learn best practices for configuring their project, including review of the submittal and RFI workflow and configuration settings, and submittal register creation / management. In addition, users will be introduced to Document Management module options including version control through the sheet and specification index tools.

Target Audience: Project Team Leads responsible for decisions regarding workflow and user responsibilities.

Learning Objectives:

Throughout the session, participants will be given the opportunity to ask questions about their specific project and will be guided through the initial set-up of their project.

- ❖ Participants will learn best practices for determining the appropriate ConstructEx roles to assign project team members. Participants will learn how to avoid workflow-related issues.

- ❖ Participants will learn best practices for configuring the default settings in each module to ensure project contractual requirements are met.
- ❖ Participants will learn how the Document Management modules can be used to share design-phase and construction-phase documents from a central repository. Participants will also learn how the Sheet and Spec Index tools provide version control and history. Module configuration settings will be reviewed.
- ❖ Participants will learn how the Submittal Register can be used to reduce errors, improve efficiency, and improve overall project management. Advanced features of submittal register reporting will also be covered.

Pre-requisites: Prior experience with ConstructEx.

NPCL 200U: Basic User Training Session (60 minutes)

In this instructor-led training session, all users will learn the basics of the ConstructEx user interface and be specifically trained in working with submittals, RFIs, document management, field management, and project communication options.

Target Audience: All project team members including subcontractors, contractors, design team, design review consultants, and owner team members.

Learning Objectives:

- ❖ Participants will learn how the Submittal/RFI workflow is structured.
- ❖ Participants will learn how to navigate the ConstructEx interface to organize, manage and issue a multitude of different document types.
- ❖ Participants will learn how to electronically add, review, and mark up submittals and RFIs while providing an audit trail of the decisions.
- ❖ Participants will learn how to issue drawings and link them to the sheet index, enabling the entire project team to always have access to the most current documents.

Pre-requisites: The project should be completely configured based on the completion of the NPCL 200A: Set-Up & Configuration Training course.

NPCL 210U: Advanced User Training Session (60 minutes)

New project training for ConstructEx is typically focused on basic construction administration functions including submittal and RFI processing. In this instructor-led session, users will explore advanced functionality in ConstructEx including custom reporting, document management, and field management. Project team members will also have the opportunity to troubleshoot problem areas in current projects.

Target Audience: Project team members who have experience with basic ConstructEx functions (submittal and RFI processing).

Learning Objectives:

- ❖ Participants will learn how to create custom logs and full log reports.
- ❖ Participants will learn how to create the Sheet and Specification Indexes under Document Management.

- ❖ Participants will learn how to use the Design / Bid Package Module – granting external access, discussion thread.
- ❖ Participants will learn advanced options in the Construction Phase Module including permission settings, Change Order Management process, and cross-referencing options.
- ❖ Participants will learn how to use the Shared Folders option in ConstructEx.
- ❖ Participants will learn how to use the Spatial Index and Field Management modules including QC items (punch lists, work-to-be-completed, non-compliance), and Mobile Apps (Capture, Plans, Task, Team).

Pre-requisites: Prior experience with ConstructEx.