

## Quick reference guide template

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Coverage sheets can be used in the Newforma ConstructEx system to display data to accompany submission packages, RFIs, and construction phases. You can use the Newforma cover template, to which you can add your logos and stamps, or you can create a custom cover sheet in the traditional format. We encourage users to use Newforma templates as a basis because their language directly correlates with the language and information in the software. Click here to download the PDF guide. This guide will guide you through the following steps in creating sheet cover: Choose the right sheet cover template - Add logos to the cover of the sheet - Add stamps to the accompanying cover sheet - Fill the information fields on the cover of the sheet, download the cover to ConstructEx - Create a custom cover sheet - Cover the problem-solving sheet Select and prepare your editing tool You can edit the covers with any PDF editor- Adobe Acrobat Make sure that Pdf Prepare Form and Edit tools are available before you start. Choose the right ConstructEx Standard Pattern cover template, which you can download from the Help website at the following: Following is a description of each of the cover templates. Sending Cover One Page Without Design Review Group This cover sheet can be used when: No stamps desirable - Only contractor stamp is desirable - The design team prefers not to use integrated marking tools This sheet of coverage should not be set for updating upon return to the contractor, as none of the information will change after its submission. Sending Cover One page with the Design Review Team This cover sheet can be used when: No stamps are desired - Only a print design team is desirable - As the contractor and brand design team used This cover sheet has additional fields that inhabit the information from the design team, so it should be set to be updated upon return. To see a template that includes an example of a brand with a field shape included, see Sending Cover - One page with a stamp sample and design team Review.pdf Sending Cover two pages with the Design Review Group This cover sheet is the same as sending a Cover One page with a design review team, but has a second page added for review comments and links. The Comment field for the review is filled with all comments made by all members of the group and notes which member of the group has added a comment. RFI Covers Most Design Groups use the print summary option in the software to create your RFI summary sheets. If this is not desirable, you can use the standard two-page RFI cover template. The construction phase paper package covers two sheets of construction coverage identical, with the exception of the Adjustment section. If your package of documents during the construction phase includes adjustments and you want that information to be on the cover, use the Adjustment Cover. Add logos to the cover when adding logos to the cover, it's best to use the original logo file, if any. It will retain a better resolution than the 233x78.png company logo files referred to in the Company's Creation and Project Logos Fast Handbook and Video. 1. Open the standard cover template in the PDF editor. 2. Choose edit PDF from the side of the toolbar. 3. Click Add Image to Edit PDF Toolbar. Go to the location of the digital logo file. 4. Once the file is open, click and drag to the place and size of the logo. 5. Repeat the process to insert any additional logos as needed. Make sure the logo files don't overlap and are about the same size. Add stamps to the cover sheet, if you're not working on a cover sheet, move on to the following section: Populate the information fields on the cover sheet. The contractor's stamp and the project team stamp can be added to the cover sheet. You can add other stamps, but it is important to note that the cover cover is submitted to all applications for the project. In most cases, it is impractical to have additional stamps on the cover. 1. Use Add an image to select the desired stamp file or files. Drag and drop the contractor's seal on the left side of the sheet. If you also add a stamp to the design team, drag it and lower it to the right side of the sheet. Align stamps to look good on page: 2. Please note that if the brand is in PDF file format, it cannot be downloaded directly to Adobe Acrobat Pro DC. You will need to take a screenshot of the PDF in order to import it: a. Open the PDF brand in Adobe Reader. B. A screenshot works best if you zoom in on the screen to at least 150% to capture the brand's good screen resolution. C. In the drop-off menu, select a snapshot. D. Choose as close as possible along the edge of the stamp to capture only the image of the stamp. E. Go back to Adobe Acrobat Pro DC and click CTRL-V to insert a stamp image on the cover. F. Image as needed with the blue squares shown below. Tap and drag the stamp to the right place. Populate the information fields on the accompanying sheet, you can match the information on the cover to automatically fill in ConstructEx documents using form fields. Use Adobe Acrobat Pro DC to either create a new form of text box box or copy an existing field as Below. Note that the list of valid form fields is included in Annex A. To create a new field 1 form. Choose a training form in the sidebar of the toolbar. 2. Tap the Add text box icon to the Prepare Form toolbar: 3. Place the field in the correct position and adjust the size and shape if necessary. 4. Enter the appropriate field name by copying the text just as it appears in Annex A: 5. Select the All Properties link and then format the text at will on the Appearance tab in the Text Field Properties dialog box. Copying the existing Form 1 field. Choose a training form in the sidebar of the toolbar. Existing fields are listed: 2. Select the existing field you want to copy by selecting a field from a field list or selecting a field directly on the form. 3. Click CTRL-C to copy the box. 4. Tap CTRL-V to insert the field into the mold. Tap and drag it to the right place. 5. Double click on the field to edit it. 6. On the overall tab, enter the appropriate Name field by copying the text just as it appears in annex A. 7. Text format at will on the Appearance tab. Note that the size of the shape field is fixed. Fields will not expand or be moved to additional pages. If the text entered in the constructEx box exceeds the available space on the cover, the full text will not appear on the cover. The full text will always be available on the ConstructEx website. If necessary, you can increase the size of the field on the sheet cover template. Download your cover sheet in ConstructEx Once your cover is completed, you can download it. Each type of cover is uploaded to its location in the software. To download the submission of the Cover Cover Of The Submittal Coverage sheets are loaded through the Sender Screen Configuration Module Dispatch Cover Sheet section: 1. Select Remove the existing cover sheet to remove the existing cover sheet. 2. Select select a file to navigate and select a cover file to download. 3. Read the cover behavior options and select the appropriate checkboxes. For example, if the accompanying sheet contains an architect's view box, select the update cover sheet when the design team returns the shipment to the Building Group option. 4. Select Save Settings at the bottom of the Cover List section to save your changes. To download the RFI coverage sheets, the RFI coverage sheets are loaded through the RFI Screen Configuration Module RFI Cover Sheet section. This process is similar to loading an accompanying sheet. 1. Choose remove the existing cover sheet to remove the existing cover sheet. 2. Select select a file to navigate and select a cover file to download. 3. Read the cover behavior options and choose the right one Most teams don't choose to merge RFI coverage. If the answer box is used on the cover, select the update cover sheet when the design team returns RFI to the Construction Team option. 4. Choose save settings at the bottom of the RFI Cover Sheet section to save your changes. To download a package of documents during the construction phase, the cover of the documents packages during the construction phase is downloaded through the Document Types section at the construction stage: 1. For each type of document, select View in the sheet coverage field to navigate and select the accompanying sheet file for download. In Chrome, View is replaced by Select File. 2. Choose save settings at the bottom of the Document Types section to save your changes. Create a custom cover sheet while we recommend using ConstructEx Cover Sheet templates because the language directly correlates with the language used in the software, custom covers can be created. A custom cover sheet can be used for any type of cover in ConstructEx. One of the problems with creating custom accompanying sheets is that the information on the cover should be reproduced using only the information available in the software. Before you create a custom cover, let's look at the following elements: Only items from App A can be used as form fields on custom covers. Not all information can be automatically filled out with form fields. Some of them must be manually filled by users using ConstructEx marking tools. As best practice, we recommend removing sheet coverage fields that cannot be automatically populated unless they matter. Each field that must be manually marked is worth the team's time. To create a custom sheet coating 1. Start with the cover PDF file that you want to recreate as a base file. As a base file, it is best to use a clean, clean cover of the document. If you export a cover sample to a PDF file from another program, be sure to print it as a PDF instead of saving as a PDF. This avoids future software formatting difficulties. 2. Once you have a basic PDF file, open it in Adobe Acrobat Standard. 3. Follow the instructions to fill out information fields on the cover of the sheet. Cover Sheet Troubleshooting - If the project has existing views and the cover will be updated upon return, we recommend that all views be closed before the new cover sheet is downloaded. If a user has tagged the cover and it has been replaced on return, this may change the purpose of their designations. If the project has submission, set to update on your return and has a single page cover sheet, we recommend you not to replace one page cover sheet with a multi-page cover. Again, we recommend closing all views before downloading a new cover sheet. If the items are not closed and marked, the markup will be moved and appear on the wrong page. If the cover sheet is removed from the system and re-loaded during the verification process, the fields no longer appear or update. An example of this behavior is if the consultant downloads the view, notes it, and re-downloads it - the field displayed on their attachment will not be updated. Please note that the sheets of coverage of the package are not updated during the construction phase. They are created when an item is first issued and does not change after that. Sometimes coverage sheets are not added to PDFs. Please see the Help Article Cover/Stamp Sheet not adding to the PDF for more information. Common Fields app (available for all types of coverage) Project No. project.id - project.name - project.addressline1 - project.addressline2 . project.address.town project.address.region - project.address.postalcode - project.owner.company project.contractor.company. designer.company Author - author.name - author.company - author.email - author.phone Sender specific fields - number - title number - status - copies - date closed internalarchivingnumber - submitted notes - reviewstatus - reviewcomments - reviewby - linktosubmittalregister - linktosubmittalregisternumber - linktosubmittalregistertitle - subcontractormanufacturer - daysrequestedforreview - linksmittnumber RFI Specific fields - number - name - subcontracting number - date - date, date-refunded - datedueconsultant - question - offer - category --subcontractor - costimpact - divisionnumber - reviews - references to a package of documents during the construction phase Headline - date as well as category of trade - description - sumadjustmentsubmitted - sumadjustmentaccepted - timeadjustmentsubmitted - timeadjustmentaccepted - links If this page is empty, clear the help filter to view the content of the topic. 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