

## Creating a New Project

Last Modified on 02/25/2019 2:58 pm EST

EDGAR submissions are stored in project files. The project file contains the EDGAR form data and references to any files that have been attached to the submission. Project files must be created inside the software. Currently, you cannot create new projects via the web portal.

To make finding your forms as easy as possible and to avoid cluttering your workspace, different "flavors" of the software are available. Each flavor of the software creates only a subset of forms. [Learn which software to use to create your form](#) .

To create a new filing:

1. [Add the software launcher to your Dashboard](#) , if you have not already done so. Software can also be accessed via the Software page available in the left navigation panel of the web portal.
2. Open the applicable software by clicking on the software launcher. This is the blue button that contains the name of the software.
3. Click **File > New**. Depending on which software you are using, the options will differ once you get to this step. In the New dialog or New pop-up menu, look for the desired EDGAR submission type. You can also view other articles in this knowledge base that are specific to your form by searching for your form and following the instructions there.
4. Click OK.

The submission data will open in a new window. On the left side of the window is a navigation bar that you can use to open different sections of the form. The *Filer Information* page contain the EDGAR form data for your submission. The other pages of the form contain the questions specific to your form.

On the right side of the window is the **Management View** window. This area displays the documents that are attached to the EDGAR submission as documents or exhibits. [Learn how to attach exhibits](#) . For EDGAR submissions that do not allow attachments, the **Management View** window will not be available.

Use the **Save** or **Save As** functions to save your filing at any time. The submission files will be saved to your Virtual File Cloud.

### Helpful Hints:

- As part of the filing process, the most recent versions of any documents referenced in the project will be combined with the EDGAR form data that is stored in the project to create the EDGAR XML file required by EDGAR. This EDGAR XML file will then be submitted to EDGAR. All of this is part of the File LIVE and File Test process. A copy of the XML file that was submitted to EDGAR will be placed inside the folder containing your project file and will be named according to the accession number of the submission.
- There are buttons available on the GoFiler Online portal to create a project automatically. Simply click the Form button underneath the launcher name on the Dashboard of the portal. You'll be able to name the project and save

it to a sub-folder on your Virtual File Cloud. If you use this tool to create a new filing, you can also choose to import data, attach exhibits or perform other operations as part of the file creation process.

- Only one submission may be open at a time. If you have a project or submission open, you will need to close it before you can create a new one. However, multiple copies of the software can be running at the same time.
- You can [set default filer information in your Preferences](#) on the GoFiler Online portal. This information will be added to your project file automatically in the Filer Information and Notification pages when you create a new project.