Newforma Cloud Quick Reference Guide

Overview

Newforma Cloud is a project website that facilitates the access of project files, including search, share, download and upload, filing of project emails and creating and editing action items. Newforma Cloud does not require VPN access and can be used through a web browser or the Newforma Cloud app.

Tasks covered

- Logging in to Newforma Cloud
- Searching Project Files
- Downloading files
- Uploading files
- Sharing files from Newforma Cloud
- Creating Folders in Project Files
- Create and editing Action Items
- Filing emails to a Project
- Using the Newforma Cloud Mobile App

Using Newforma Cloud

You can access Newforma Cloud in the following ways:

- Newforma Cloud website: https://newforma.cloud
- Newforma Cloud mobile app, downloaded from Google Play Store or iTunes

To log into Newforma Cloud

Log in with your Office 365 credentials:



To search project files

Once you have completed your initial login, you can search Project Files.

1. Click the project you want to search:

PROJECTS ACTION ITEMS FILE EMAIL				
\$ Projects				
Recent Projects My Projects Shared Folders				
Alpengrove Science Center 12	Fowler Square Design		One Oak Street 12	
Number: 1999009.12	Number: 2010338.73	NPC	Number: 2018001.12	(NPC)

2. Enter your search term and press Enter. The search results appear on the left of the page. Click the **Filter** dropdown at the top-right of the search results to narrow the results by file type:

Searc	suits skylight ×
	Film
	Nol Dastedonand Chi Bofgal catalog i mg 9909 51/2- Communication/Smith/2016 64/ g catego girlmanutes
•	nime.086000 41_110211_Seylight catalog internation.zjp 99009 51/c ⁻ Communication/Trenters.hearing/
B	gels par sevos si 21-0- Communication/Timother/Economicy/ sevos si 21-0- Communication/Timother/Economicy/ second site and the second
E	gins par 9900 B1/C- Communication/Email/2010-04/ MULLARED STRUCTURAL SPCTEM SPECIFICATION PAR
E	gel meeting pat 9900 BL/C = PMLS J #2000M 100/LEGLAP G OUNN STAR 2 FMLS J #2000M 100/LEGLAP G OUNN STAR
B	18.00g 9000 81/1-CAC/ArehV 921 40/0-11/9
в	HATEEL BAG BOOTS D.S.H RADAR BANK AND FAHEL SWITH INTEGRAL

3. Highlight a result to view item details in the right panel. Depending on your permissions, you may have the option to download or delete the item. A hyperlink takes you to the folder that contains the file:



4. Click on a folder to "drill down" into the folder structure:

\$	Alpengrove Science Center 12 ~
Files	
NAME	
	1999009.01
1	1999009.01-Admin

To work with folders and files

Click on the ellipsis to the right of a folder to access Share, Download, Rename and Delete options. You can also create a new folder and upload files to the folder:

Files> 1999009.01		+ CREATE FOLDE	R 🔶 UPLOAD
NAME	DATE	SIZE	
A - As-Builts	8/4/17	-	
B - Management	8/4/17	-	Share Download
C - Communication	8/4/17	-	Rename Delete
Clash	10/00/10		

Following is a description of each of the options.

Share a folder with External Users

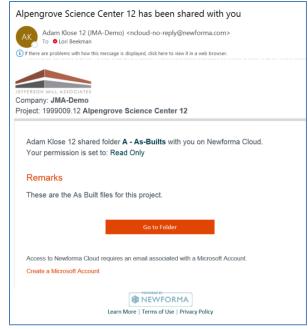
Note: The Share option is currently in Early Adopter and may not be available. If you would like to be considered for Early Adopter access of this feature, please reach out to your Account Manager.

1. Click **Share** to share a file or folder with external users:

Share Folder	"A - As-Builts"
Share with:	nembers
Permission: Read Only Remarks: Enter your remarks here	Enter any necessary remarks
	CANCEL SHARE

- 2. Type a name in the **Share With** field. A list of matching names and groups from the Project Team appears. You can also enter an email address directly.
- Set share permissions from the **Permission** dropdown list. Options are Read Only, Read and Upload or Full Access.
- 4. Enter any remarks you want included with the share notification in the **Remarks** field.

5. Click **Share** to share the file or folder. The share notification email is sent to all selected users:



- 6. Select a folder to view Share activity in the **Details panel** on the right side of the page.
 - To change share permissions, click the **Shared tab** in the panel. Click the permissions dropdown for the user you want to change and select the new permission:

A - As-Builts		
	+ Create Folder	
Download		
Download Share	Create Folder	
> Share	Create Folder	Read Only
Activity Share	Full Access	Read Only
Activity Share		Read Only

• To revoke the share, click the **Revoke** button for the user.

Download folder contents

Click **Download** next to a folder to download its entire contents. Click **Download** for an individual file to only download that file:

NAME	DATE	SIZE	
A - As-Builts	8/4/17	-	
B - Management	8/4/17	-	Share Download
C - Communication	8/4/17	-	Rename
Clash	10/29/18	-	Delete
CM - Contract Management	8/4/17	-	

Rename a folder

Click **Rename** to change the name of a file or folder:

	Rename Folder		
Folder Name *			
A - As-Builts			
	CA	ANCEL	RENAME

Delete a folder

Delete a file or folder. You are asked to verify the deletion before continuing:

Delete File	
Are you sure you want to delete Alpengrove - Al	001.pdf?
CANCEL	DELETE

Create a folder

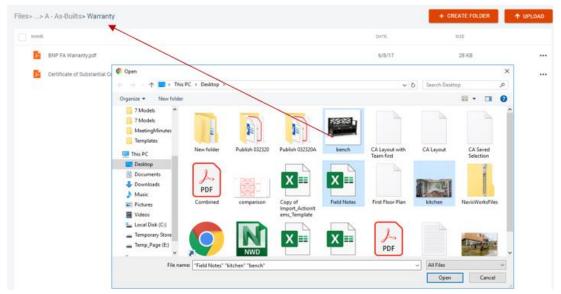
Click Create Folder to add a new subfolder underneath the current folder:

Files> 1999009.01> A - As-Builts			+ CREATE FOLDER	↑ UPLOAD
NAME		DATE	ste	
As-Built Drawings		8/4/17	/-	
Permits		11/7/17		
Product Information		8/4/17	/ -	
Warranty			/	
		Create Fold	er	
	Folder Name •			
				_
			CANCEL	CREATE

Upload files to a folder

Click **Upload** to upload files to the current folder. You can select multiple files to upload at one time.

Note: You can also drag and drop files to a Newforma Cloud folder.



To create and edit Action Items

You can use Newforma Cloud to create and edit action items that are assigned to you or by you that are not in a completed state.

1. Click **Action Items** in the top menu bar to view the **Action Items** page:

PROJECTS ACTION ITEMS FILE EMAIL					
😫 🕴 Action Items					
FILTERS V Assigned to me X Assigned by me X					+ CREATE ACTION ITEM
тптье	TYPE	COMPLETED	DUE DATE	DAYS LEFT	
Action Item for: 00028 - Rebar in Elevator Pit conflicts with drainage lines One 0ak Street 12	Action Item	0%	7/29/19	-249 days	Ås.
Review drawings One Oak Street 12	Action Item	0%	8/14/19	-233 days	24. Ø
Hole in wall One Oak Street 12	Action Item	0%	9/23/19	-193 days	<u>28</u> Ø
Order wallpaper One Oak Street 12	Action Item	0%	9/30/19	-186 days	<u>2</u> £ Ø
Friday meeting prep One Oak Street 12	Action Item	0%	10/28/19	-158 days	<u>28</u> Ø
The TOWER!	Action Hom	08	10/20/10	150 dava	00

2. Click **Filters** in the upper-left corner of the Action Items list to further narrow the results:

JECTS	TYPES
) Search for project	All types
All projects	1 - Promotion
Alpengrove Science Center 12 1999009.12	Actiepunt
Fowler Square Design 2010338.73	Action Item
0ne 0ak Street 12 2018001.12	Action Item (AJ)
	All projects Algengrove Science Center 12 1999009.12 Forwler Square Design 2010338.73

Filter options include:

- Assigned to Me
- Assigned by Me
- Project
- Type
- 3. Select an action item in the list to view its details in the **Details** panel. Click the **pencil icon** at the top of the panel to edit the action item. Click the **checkmark icon** to mark the action item as Closed and remove it from your list:

Review drawings		
00162 - Action Item One Oak Street 12		
DUE DATE: April 21, 2020		^
(14)	30	
DAYS LEFT	% COMPLETE	
ASSIGNED BY: Adam Klose 12 ASSIGN	ED TO: Bob Welder 12 +1	\sim
DESCRIPTION: review included drawings.		
ATTACHMENTS: 2 Files		^
x0408.dwg 3/26/19 1.2 MB	5891S611.dwg 7/19/19 258.KB	
DISCUSSION ITEMS: No items to discuss		^
AK Add Discussion Item		

4. When you click the pencil icon, the Edit Action Item dialog box appears. In addition to changing attributes, you can attach files to the action item. Click Add From Project to select project files, or add files from your device by clicking Choose Files or dragging and dropping the files to the action item:

Edit Action Item		
Action Item Name -		
Review drawings		
Project *		
One Oak Street 12		
Due date		
8/14/2019		
Assign to		
Bob Welder 12 X Carolyn Hunter 12 X		
% Complete		
0 O Completed		
Description		
review included drawings.		
,		
Attachments	Add From Project	L
		L
Choose files or drag and drop them here.		l
Choose files or drag and drop them here.		
Choose files or drag and drop them here.		J

To file emails to a project

In addition to project files and action items, Newforma Cloud also allows you to file emails to projects while on the go.

1. Click **File Emails** in the top menu bar. Emails currently in your Inbox appear:

😫 File Email	
Inbox	+ FILE IN PROJECT
Newforma Alert: Project Center Server JMA-DEMO-NPCS01' [Application Monitoring] - it ha Newforma Project Center Server JMA-DEMO-NPCS01' has generated an alert. Alert Generated for : Project Center Server JMA-DEMO-NPCS01' Alert Time : 4/3/2020 4/37/23 A	File Transfer: Project Transfer - Newforma File Sharing
Vesterday Pile Transfer: Project Transfer - Newforma File Sharing Project: Newforma File Sharing Notification about File Transfer Project Transfer Pieses see the attached information. File Transfer Info Purpose For Your Use Expiration	To: Adam Klose 12 From: Lori Beekman
Project: Project Transfer: Project Transfer: Newforma File Sharing Project: Newforma File Sharing Notification about File Transfer Project Transfer: Prove For. Project: Newforma File Sharing Notification about File Transfer Project Transfer Provided at If lifes: File Transfer Info Purpose: For.	Project: Newforma File Sharing Notification about File Transfer Project Transfer
Prease see the autoried information. Othermode an mess the transition multiplier, row. DoNotReply@Newforma.com Vesterday Newforma into Exchange Password Set Notification Greetings Project Team MEMBER Thank you for signing in to Newforma Into Exchange, Your new password has been set. If you didn't make this change, click on the link below,	Remarks

2. Highlight an email and click File in Project:

m

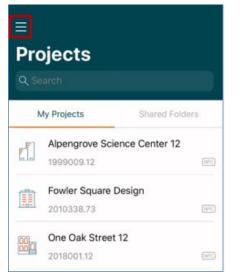
3. Select the desired project from the list. Once the email is filed, a checkmark appears next to the email. The email remains in your Inbox and a copy is filed to the project. In Outlook, the email is tagged with the **Filed By**

🚯 File Email	New New Email Items	File in Ouick Move Tags Groups	Speech
nbox	Email Items * 🍣 * 🕞 Forward New Delete Respo	Project Winner 4 Steps V	·
Newforma Alert: Project Center Server 'JMA-DEMO-NPCS01' [Applie	▷ Favorites <	Search Current Mailbox	
Newforma Project Center Server 'JMA-DEMO-NPCS01' has generate Generated for : Project Center Server 'JMA-DEMO-NPCS01' Alert Ti	▲ aklose12@jma-demo.com	Focused Other	
•	Inbox 361 Drafts (8)	Other: New message (1) MyAnalytics	
Ø File Transfer. Project Transfer - Newforma File Sharing	Sent Rents	! D @ FROM SUBJECT CATEGORIE	s
Project: Newforma File Sharing Notification about File Transfer P Please see the attached information. File Transfer Info Purpose	Deleted Items 1318	File Transfer: Project Transfer - Newforma File Sharing File Transfer: Project Transfer - Newforma File Sharing	Newforma
	Archive	DoNotReply@N Newforma Info Exchange Password Set Notification	
File Terrates Desired Terrates, Mandama File Obseries	Conversation History	File Transfer: Project Transfer - Newforma File Sharing	
File Transfer: Project Transfer - Newforma File Sharing Project: Newforma File Sharing Notification about File Transfer Pre	Junk Email	DoNotReply@N Newforma Info Exchange Account Notification	

Using the Newforma Cloud App

In addition to the Newforma Cloud website, you can download the Newforma Cloud mobile app for iOS and Android. To get started, log in with your Office 365 credentials.

Once you login, the **Projects** screen appears:



Tap the hamburger icon in the upper left to file emails and access action items:



To work with folders and files

The same search and filter options are available as on the website. Tap **Filter** in the upper right of the screen to access the filters:

	skylight		Cancel
			Filter 🚽
\bigtriangledown	21-ZF	Search Filter	s
	<mark>Sky</mark>	Images	\oplus
	Subr 1999 Trans	PDFs	\oplus
	Trans	Project Email	\oplus
*	Skyli 1999 Trans	Other Documents	\oplus
	950 SYST	ОК	
*	950 IN	ts.pdf 9.01/C - Communication/Er SULATED STRUCTURAL <mark>S</mark> SPECIFICATION PAR	
۲		meeting.pdf 9.01/c - communication/en	nail/2019-02

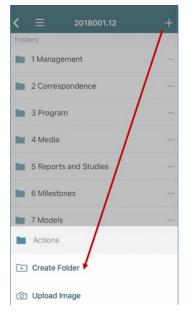
Tap on a file to view its details. Tap on the ellipsis at the top of the **File Details** screen to view, export, share, rename or delete the file:



Tap the ellipsis to the right of a folder to access the **Share** and **Rename** options:

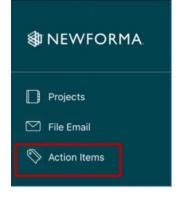
<	≡ 1999009.01	+
Fold	iars.	
-	A - As-Builts	1
in.	B - Management	
-	C - Communication	
10	Clash	
	CM - Contract Management	
	A - As-Builts	
R	Share Folder	
1	Folder Info	
0	Rename	

Tap the plus sign in the upper-right corner to access the **Create Folder** and **Upload** options:

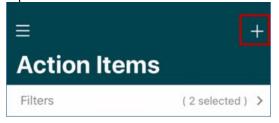


To create and edit Action Items

1. Tap the hamburger button on the **Projects** screen and tap **Action Items**:



2. As with the Newforma Cloud website, you can apply filters to the list of action items. Tap the plus sign at the top of the screen to create an action item:



3. Enter any values as needed and tap **Save** in the top right corner:

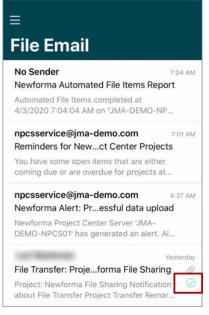
〈 Back	Save
Item Name	
Days Left % Comple	ete
Due Date	
Project One Oak Street 12 2018001.12	>
Туре	>
Description	>
Assigned To No one has been assigned	>

4. To edit an action item, tap it in the list, then tap **Edit** in the top right corner. In addition to changing the action item name, you can modify the Due Date, Description, and Assignment. You can also mark the action item as closed:

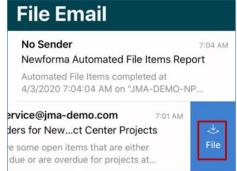
< Back	Save
Action Item for: 00028 - Rebar in Elevat	or Pit c
00161	
-249 0 Days Left % Complete	
Mark as Closed	\bigcirc
Due Date	
7/29/19	
Project	
One Oak Street 12	
2018001.12	
Туре	
Action Item	
Description	
Here is the COP for the elevator pit, I am eagerly awaiting a Change Order.	>

To file emails to a project

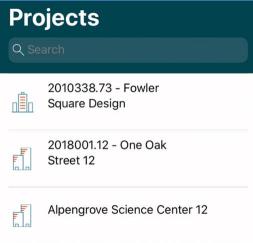
- 1. Tap the hamburger button on the **Projects** screen and tap **File Email**.
- 2. As with the Newforma Cloud website, emails in your Inbox appear. If the email has already been filed to a project, it will have a green checkmark next to it:



3. To file an email, swipe left and tap File:



4. Tap the desired project in the list:



5. Once the email is filed, a checkmark appears next to the email. The email remains in your Inbox and a copy is filed to the project. Indicators also appear in the Newforma Cloud website and Outlook:

