Newforma Project Information Link Quick Reference Guide

This topic provides a reference for **Newforma Project Information Link**.

Purpose

Newforma Project Information Link enables you to make a connection between your Revit[®] models and elements and Newforma building models and elements and other project information. Once the links are created, you can synchronize information back and forth between Newforma Project Center and Revit.

Audience

Internal project team members.

Key Features

- **Newforma Project Information Link** connects Revit models and elements to Newforma project information.
- See and track your list of registered Revit models and elements in the **Newforma Building Models and Elements** activity center.
- Sync elements, spaces, and record documents from Revit into Newforma Project Center and edit extended properties.
- Mass update elements, spaces, and record documents data using Newforma's Edit in Spreadsheet tool, then sync changes back to Revit.
- Create action items and markups linked to a Revit model.

Register an Autodesk® Revit Model

Before you can connect your Revit model to project information inside Project Center and sync data back and forth, you must register your models within Project Center. You can register multiple models with a single Newforma project. The two options for registering your models are explained below.

When registering an Autodesk Revit model, it is best to utilize a central model since it functions as the central organizing model for all team members.

Option 1: Register a model from Project Center:

1. To register a model from within Project Center, go to the **Building Models and Elements** activity center and select **Register Model** from the **Tasks** panel.



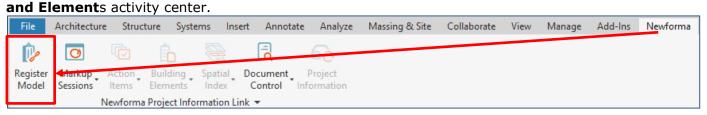
2. Fill in the **Name**, and browse to locate the **Model File** in the **Register Building Model dialog box**. Fill in any other information as desired and click **OK** to save.

Register Build	ing Model	_	×
Name:	Architectural Model		
Author:	Disciplines:		
Members:			
Model File:]

Option 2: Register a Model from within Revit:

 To register a model from within Revit, select **Register Model** on the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon, and select the project.

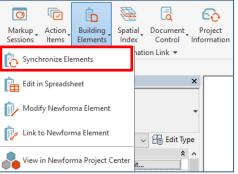
The model record is automatically created, linked to the model, and appears in the **Building Models**



Synchronize Newforma Elements

Newforma elements are used to organize and track information related to objects in your models and can be seen in the **Building Models and Elements** activity center. Elements can be any building component such as windows, walls, piping, or room tags. Once the elements are created in Newforma you can use various tools to mass update information, and then sync those changes back to Revit.

 To synchronize elements from Revit to the Building Models and Elements activity center in Project Center, go to the Newforma Project Information Link add-in, located on the Newforma portion of Revit's ribbon, and select Building Elements > Synchronize Elements.



2. In the **Synchronize Building Elements dialog box**, click **Add Revit Elements** to select the elements you want to synchronize.

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3. Select individual elements in the model or drag to select multiple elements. Once you've selected the elements you want, click **Finish**.

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4. The selected elements appear in the Synchronize Building Elements dialog box. Use the column filters to isolate the elements you want, then mark the checkboxes of the items you want to synchronize. To create additional matching extended properties between Revit and Newforma Project

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5. Highlight the Revit property and click **Create Matching Extended Property**. The property is created.

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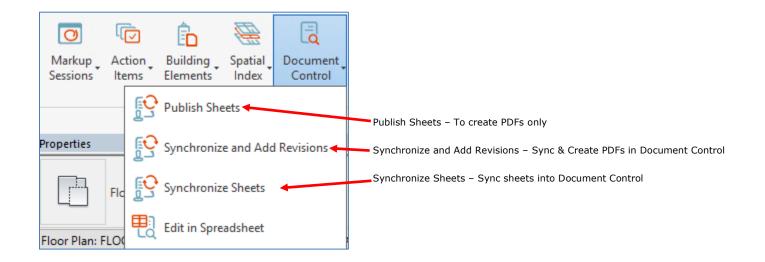
6. Select the group for the extended property and select **OK**. You will now see the new element in the **Items to Synchronize** list.

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7. Use the edit buttons to edit any Newforma properties. Select **OK** when complete. The Elements appear in the **Building Models and Elements** activity center.

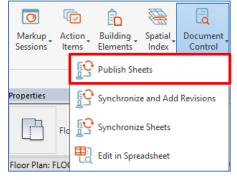
Create Record Documents and PDFs from Sheets in Revit

You can easily create record documents and attach PDFs in the **Document Control** activity center from the sheets in Revit. Once the record documents are created and the files are attached, you can track revisions and issuance of your important construction documents.



To publish sheets to PDF(s)

 To create PDFs from Revit, go to the Newforma Project Information Link add-in located on the Newforma portion of Revit's ribbon and select Document Control > Publish Sheets.



2. Select **Add Revit Parameters** if there is a need to include custom Revit parameters for custom sorting of a multi-page PDF.

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3. Select **Publish Settings** to control PDF print location, print driver settings and PDF naming conventions.

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4. Control the naming of Combined PDFs (similar to individual PDF files). The name may also contain hard coded information.

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Select a property and click Insert>	
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[CurrentRevisionNumber]	
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[ProjectNumber]	
[ProjectNumber-ProjectName]	
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[Date]	
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5. Click **Publish** to publish the sheets to PDF.

To synchronize sheets and publish PDFs

The Synchronize and Add Revisions process described here is the recommended method for synchronizing revision data, as it is specifically intended to be used for synchronizing revision data between Revit and Project Center.

 To sync and create PDF sheets from Revit to create Newforma record documents, go to the Newforma Project Information Link add-in located on the Newforma portion of Revit's ribbon and select Document Control > Synchronize and Add Revisions.

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161 items total														Quick glance at current
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 After changing any needed settings, select Synchronize and Add Revisions in the Synchronize and Add Revisions dialog box to synchronize sheets and create PDFs.

3. The record documents appear in the **Document Control** activity center along with the linked PDFs.

DOCUMENT CONTROL - ONE OAK STREET 12 (201800)	1.12)					
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To synchronize sheets

It is recommended that you do **NOT** synchronize revision data using **Synchronize Sheets**, as this could cause data inconsistencies between Revit and Newforma. To synchronize revision data, use **Synchronize and Add Revisions**, as it is specifically intended to be used for synchronizing revision data between Revit and Project Center.

This option synchronizes only the sheet data from Revit to Document Control. This function does not publish PDFs.

 To sync sheets from Revit to create Newforma record documents, go to the Newforma Project Information Link add-in located on the Newforma portion of Revit's ribbon and select Document



2. In the **Synchronize Sheets dialog box**, click **Sync Settings** to create extended properties to be synchronized. The **Edit Settings for Document Control Properties dialog box** opens:

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	None	Revision Purpose		Built In					
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18 items total									

3. Highlight a Revit property and click **Create Matching Extended Property** to create a corresponding Newforma property.

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18 items total	V	Tale (President)		n				,
Import From Project								OK Cancel Help

4. Highlight the Newforma property to change options such as **Mapping Behavior** and **Group Name**. Click **OK**.

Newforma Properties	::			
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5. In the **Synchronize Sheets dialog box**, review the information and select the items you want to sync, then click **Synchronize** to create the record documents.

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Revit Sheet parameters can synchronized.	ı be synchroni	ized with Newforma R	Record Document properties. Use the 'S	ync Settings' dialog to spec	cify which parameters an	d properties are	
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Current Revision	Revit> Nev	wforma	Revision Number			Built In	
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Select the items to Synchron Sync Action Create Newforma Record Create Newforma Record	Document Document Document Document Document Document Document Document Document		Exterior Details Interior Column Plan Details Interior Atrium Details Interior Atrium Details Interior Details Ceiling Details Stairs & Elevator Details General Information Lot Layout	Sheet Sets DD Arch set	Dra JK MG JM JM MG NC Auth	or or or	
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Create Newforma Spaces

You can take Revit rooms and areas and sync them to Newforma to create spaces in the **Spatial Index** activity center. Spaces are needed in Newforma if you plan to use the Punch List app. In addition, you can easily mass update items like finishes and other properties once they are in Newforma, then sync that data back to Revit.

 To sync spaces from Revit, go to the Newforma Project Information Link add-in located on the Newforma portion of Revit's ribbon and select Spatial Index > Synchronize Spaces.



2. In the Synchronize Rooms, Spaces, and Areas dialog box, click Sync Settings if you want to

add, edit or remove any extended properties as described above. Click **OK** when done.

💑 Synchronize Rooms, Spaces, and Areas with Project: 2018001.12 - One Oak Street 12									
Revit room, area, and space object parameters can be synchronized with Newforma Space properties. Use the 'Sync Settings' dialog to specify which parameters and properties are synchronized.									
Important Note: Synchroniz	ation will modify th	e following existing da	ta:					_	
Select the properties to Synchr	onize:					Sync	Setting	s	
🗹 Revit Parameter Mapp	ing Behavior	Newforma Prope	rty 🔺	Group Name	Type 🔺				
±		Ŧ	T		7 7		_		
Name Revit -	-> Newforma	Name			Built In				
Number Revit -	-> Newforma	Number		-	Built In				
2 items total									
Select the items to Synchroniz	ie:		Show	Change Link	Assign Space Type			~	
Sync Action	Туре	Name	Number	Level	Newforma Space Type			^	
	Ŧ	Ŧ	7	Ŧ	Ŧ	Ŧ			
🗹 Create Newforma Space	Room	STORAGE	409	288033					
🗹 Create Newforma Space	Room	FREIGHT	408	288033					
🗹 Create Newforma Space	Room	STAIR 2	400S2	288033					
🗹 Create Newforma Space	Room	ELEVATOR LOBBY	401	288033					
🗹 Create Newforma Space	Room	CORR	402A	288033					
🗹 Create Newforma Space	Room	CORR	402C	288033					
🗹 Create Newforma Space	Room	LEASE AREA	220	9946					
🗹 Create Newforma Space	Room	LEASE AREA	222	9946					
🗹 Create Newforma Space	Room	LEASE AREA	221	9946					
🗹 Create Newforma Space	Room	BALCONY	222	9946					
🗹 Create Newforma Space	Room	ELEVATOR LOBBY	101	30					
🗹 Create Newforma Space	Room	ATRIUM	102	30					
🗹 Create Newforma Space	Room	SERVICE CORR	108	30					
🗹 Create Newforma Space	Room	NORTH VEST	119	30					
🗹 Create Newforma Space	Room	CAFE VEST	124	30				~	
364 items total									
Select in Revit					Synchronize	Cancel	Hel	p	

- 3. Use the column filters to isolate the spaces you want, then mark the checkboxes of the items you want to synchronize. Click **Synchronize**.
- 4. The spaces appear in the **Spatial Index** activity center.

SPATIAL INDEX - ONE OAK STREET 12 (2018001.12)								
& All Spaces (1	87)							
System Type	Number 🔺	Name						
	Ŧ	Ŧ						
	108	SERVICE CORR						
	109	DELIVERY ROOM						
	109A	DUCT CLOSET						
	110	FAN ROOM						
	112	ELEC SWITCH GEAR						
	113	BUILDING OFFICE						
	114	STORAGE						
	115	KITCHEN STORAGE						
	116	PUMP ROOM						
	117	ACCESS CORRIDOR						
	118	EXIT CORRIDOR						
	119	NORTH VEST						
	120	LEASE AREA						
	121	LEASE AREA						
	122	LEASE AREA						

Use Edit in Spreadsheet to Mass Update Elements, Sheets, or Record Document Data

You can use the **Edit in Spreadsheet** task in Newforma when editing elements, sheets, or record documents to utilize Excel's streamlined copy/paste functionality to expedite editing. You can also utilize formulas within Excel to quickly generate various calculated totals. This tool is especially helpful if you want to utilize office staff to edit element, sheet, or record document data who may not be well versed in Revit.

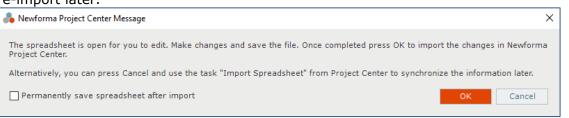
The **Edit in Spreadsheet** task can also be run from the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon.

If you are using **Synchronize and Add Revisions** to synchronize record document data between Revit and Newforma, you should **NOT** also edit record document data in a spreadsheet. Mixing synchronization methods can cause data misalignment for your record documents.

 To mass update space data, go to the Spatial Index activity center and select Edit in Spreadsheet from the Tasks panel.

TASKS
Spatial Index
Create Space
Create Space Type
Edit in Spreadsheet
Utilities
Create Report

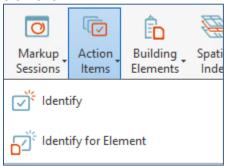
2. When prompted, navigate to a location in which to save the exported data. After saving the file, it opens in Excel. Edit the data as desired, then save and close the file. A message appears prompting you to click **OK** to re-import the modifications. If you are not ready to import changes, click **Cancel** to re-import later.



Add Action Items from Revit Model

If you are working in a Revit model and want to add a to-do item for yourself or someone else, it is easy to add an action item. Once added, it can be accessed from Newforma in the **Action Items** activity center.

- 1. To add an action item, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Action Items**, then one of the following:
 - Select **Identify** if you want to add an action item related to the model in general; or
 - Select **Identify for Element** if you want to add an action item related to a specific element.



 Fill out the action item details as desired in the Identify Action Item dialog box. Modify the Subject if needed. If you know who to assign the item to, fill out the Assigned To field, or it can be assigned later. Add any details in the Description as needed. Note the model appears on the Related Items tab. Select Create when done

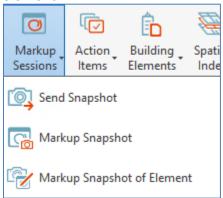
🜲 Identify Action Ite	m						-		×
Subject:	Building Model: FOWLER SQUARE								
Type:	Action Item	~	Action Item ID:	Auto Number					
Status:	Not Started	~	Priority:	Normal					~
Percent Complete:	0		Disciplines:						
Assigned:	No Date		Assigned To:						
Due Date:	No Due Date	0 ~	CC:						
	Remind 0 🔹 days before due	(1)	Assigned By:						_
Action Completed:	No Date								
Description	Discussion Email Log (0)	Supporting Documents (0) Related	Items (1)	Change	Log			
				Rela	te to 🔻	Share with Exter	nal 🔻	Remov	е
Subject	Туре		Wo	rkflow	Team Me	mbers			Keywo
	Ŧ		Ŧ	7				7	
fowler squar	RE Building Model				Adam Klo	se 12			
<									>
Keywords:									
4		Next Action				Create	Cancel	He	lp

3. If the action item is assigned, and the **Send change notification email** box is checked, an email is created. Review the email and click **Send and File in Action Item** to send it.

Create Newforma Markup Sessions from Revit Model

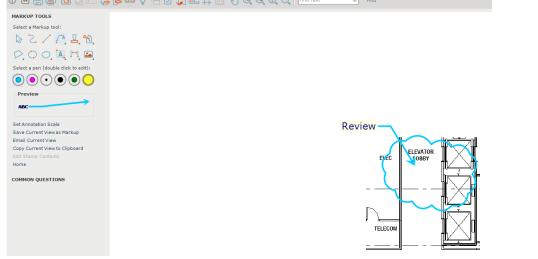
You can use the Newforma Markup tools while working in a Revit model. Once added, markups can be accessed from the **Markup Sessions** activity center.

- To mark up a drawing, zoom into the area of the drawing you want to markup. Go to the Newforma Project Information Link add-in located on the Newforma portion of Revit's ribbon and select Markup Sessions, then one of the following:
 - Select Markup Snapshot if you want to do a markup related to the model in general; or
 - Select **Markup Snapshot of Element** if you want to do a markup related to a specific element.



Click and drag the Newforma Snapshot camera to select the rectangular area you want to capture for the markup. It appears in the Newforma Viewer. Use the markup tools to mark up the drawing.

 Image: Click and drag the Click area of the markup tools to mark up the drawing.



 To save a markup session in Newforma, click Save. Modify the Name and/or add Remarks if desired in the Save Markup Session As dialog box. Note that the model appears on the Related Items tab. Click OK when done.

