

# Document Sets and Shared Folders

*This webinar is intended for Newforma Project Center users and administrators.*

Have you ever wondered what Document Sets are and if these are different than Shared Folders? Or when to use either one? If so, then this is the webinar for you!

## TOPICS COVERED

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- What are Document Sets?
- What are Shared Folders?
- Why would I use one over the other?
- How to set up a Shared Folder
- How to set up Document Sets
- How to access either of these on Info Exchange

## QUESTIONS & ANSWERS

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**Q: Can Document Sets span multiple projects?**

A: Not Currently. Document Sets are defined per-project.

**Q: How does somebody end up the default member of a new Document Set?**

A: The Members field defaults to include the user creating the Document Set.

**Q: Can a folder be added to a Document Set and have the contents of said folder automatically be added as they are updated? For example: make a folder called "Photos" and as photos are added in the folder they become part of the Document Set?**

A: Yes, when files are added to a folder, they become part of the Document Set.

**Q: It seems that one can create markups from multi-page PDFs if it's in a document set vs multi-pages in document control?**

A: Multi-page PDF's can be in Document Sets or Document Control and then can be marked up from either the Newforma Viewer or the Info Exchange Viewer. Currently multi-page PDF's are not supported on the Plans App for mark-up but that is in the backlog to be looked at.

**Q: Document sets - What does active versus inactive accomplish?**

A: The status of a Document Set is simply a way to track its current status. For example - I may create a bid set of documents as a Document Set and set it to Active while it is in use (during bidding). Once I have the final bids, I may change the state to Inactive. As with most dropdowns in Newforma, that list can be updated to reflect your project's needs. The status field is not a required field.

**Q: Once a Document Set is created, a Shared Folder must be created from it to make it accessible via Info Exchange?**

A: A Document Set is available to Internal Team Members on Info Exchange immediately, however to share a Document Set with External Team Members it must be set up as a Shared Folder.

**Q: What if you are Synchronizing over different time zones?**

A: The Sync Schedule is based on the time of the Project Center Server.

**Q: Can files be added to or removed from the Document Set at a later date? Are those changes reflected if the Document Set has been shared?**

A: Yes. When files are modified or changed from a Document Set, Internal Users see the change immediately. For External Team Members the shared folder would then need to be re-published or re-synced either manually or at the next schedule sync (if set up). Only the changed files will be uploaded.

Q: Can you create a Document Set of subfolders?

A: Yes, absolutely!

Q: There's no way to share a single folder out with different permissions (i.e. allow / deny upload) for different groups of users?

A: Permissions are based on the individual Shared Folder setting. Each folder can be shared multiple times to accommodate the need for different permissions for different users.

Q: Do document sets time out after 30 days?

A: Yes, expiration of content is an option on the shared folder options and will expire based on that schedule or after the last sync and the expiration days.

Q: Does an external team member need to have Newforma installed in order to upload files?

A: No, external users can use the Info Exchange website to upload files. The Info Exchange website requires just a web browser.

Q: How do you create groups within the Project Team?

A: Groups can be established from the Project Team activity center, using Add Group from the TASKS menu on the left of the Project Team Activity center.

[http://help.newforma.com/Newforma\\_Project\\_Center\\_Eleventh\\_Edition/desktop/Activity\\_Centers/Project\\_Team\\_window.htm](http://help.newforma.com/Newforma_Project_Center_Eleventh_Edition/desktop/Activity_Centers/Project_Team_window.htm)

Q: Can an external team member with permissions to a specific document set add a new document of their own to the set?

A: Yes - if uploads are enabled for that shared folder.

Q: How do you indicate revisions in a Document Set so that all past issues of a file are related?

A: Document Sets do not have a revision number like Document Control, I would recommend revision controls using the authoring software, Microsoft Word© or Microsoft Excel© for example.

Q: When a person who originally shared the folder or Document Set leaves the company, can the shared folder be managed by someone else and who can that be?

A: Another Internal Team member will need to take ownership of the Document Set and if they have been set up as a Shared Folder the Username and Password for each shared Document Set will need to be updated.

Q: When in the office, is there a use case for bringing up info exchange site? The widgets look graphically laid out a bit more user friendly than Project Home.

A: Not normally. Info Exchange has been optimized for external use.

Q: When you modify the published folder, is it only done by the person who originally created the share?

A: No, the Shared Folder settings can be adjusted by internal team members.

Q: I'm trying to share a folder in my own NPC, but right-clicking on the project in the "All Project Files" view does NOT give me a "Create Shared Folder" option (or anything with the word "Share" in it).

A: Info Exchange must be enabled on the project to set up a Shared Folder.

Q: When sharing a Document Set with users and it pulls docs from multiple folders and the External Users are allowed to add their own documents to the set, where does the new document end up for the Internal User?

A: When setting up a Document Set as a Shared Folder if the upload option is selected you will choose what folder to have the uploaded document sent to for the Internal User.