

Newforma Info Exchange Quick Start Guide for External Users

Overview

Info Exchange is a project website that facilitates the transfer of files without the limitations of email or FTP. All activity on Info Exchange is fully tracked so you will know when someone has downloaded the files you sent.

This guide covers the following topics:

- [Log into Info Exchange after receiving an invitation](#)
- [Receive a file transfer](#)
- [Send files from Info Exchange](#)
- [Send an RFI, submittal or change order proposal via Info Exchange](#)
- [Respond to a forwarded submittal](#)
- [View and update action items](#)
- [Create action items](#)
- [Use the Newforma Web Viewer to markup or stamp files](#)
- [Download files from shared folders on Info Exchange](#)
- [Upload files to shared folders](#)
- [Use Newforma ID](#)

Using Info Exchange

To log into Info Exchange after receiving an invitation

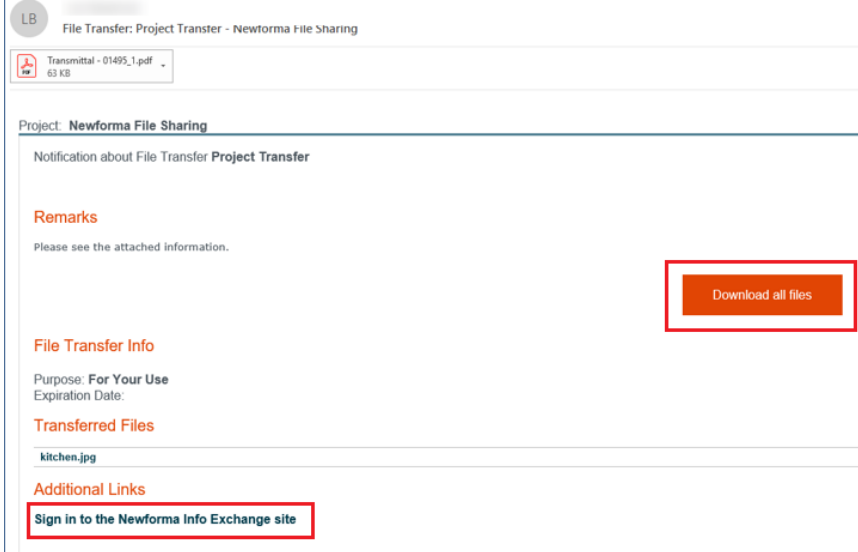
You will receive an email inviting you to use a particular company's Info Exchange project website. The email includes a link to the Info Exchange website. The first time you access the secure website, you are prompted to set your password and accept the terms and conditions.

The link included in the invitation email can only be used once.

To receive a file transfer

Once you complete your initial login, you are ready to receive files.

1. You receive an email notifying you when someone has posted a file transfer for you. The notification email includes two links with options for accessing the files. Select the first link to download and save the files; select the second link to log into the Info Exchange website and download the files.

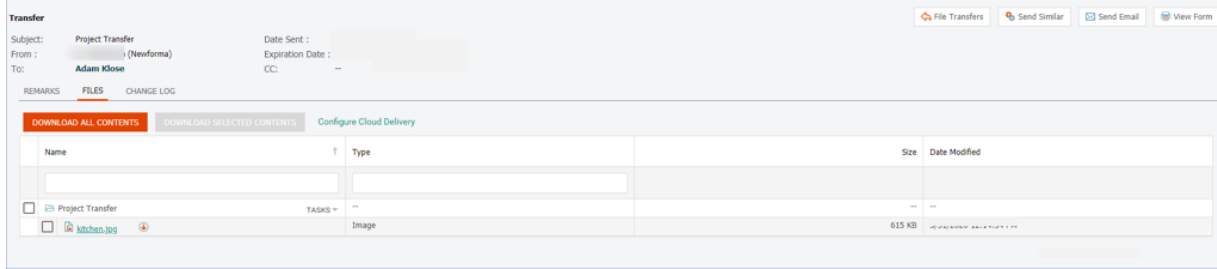


2. When you click the link to login to Info Exchange, you are prompted to enter your username and password. Enter your information and click **Sign In**.

The screenshot shows a sign-in form titled 'Sign in to Newforma Info Exchange'. It has two input fields: 'Username' and 'Password'. Below the password field, there are two links: 'Forgot password?' and 'Newforma ID'. A large red button labeled 'SIGN IN' is positioned below these links. At the bottom of the form, there is a checkbox labeled 'Remember username'.

*Use the credentials you used during your initial login. If you forget the credentials, use your email address as your user name and select **Forgot Password?** to receive password reset instructions.*

3. On login, Info Exchange opens the **Transfer page** for the file transfer, shown below.



4. Click **Download All Contents** to download all the files in the transfer. You can also download specific files. Mark the checkbox next to the files to download and click **Download Selected Contents**.

Download Selected Contents is only available if the original file transfer was set to allow partial downloads.

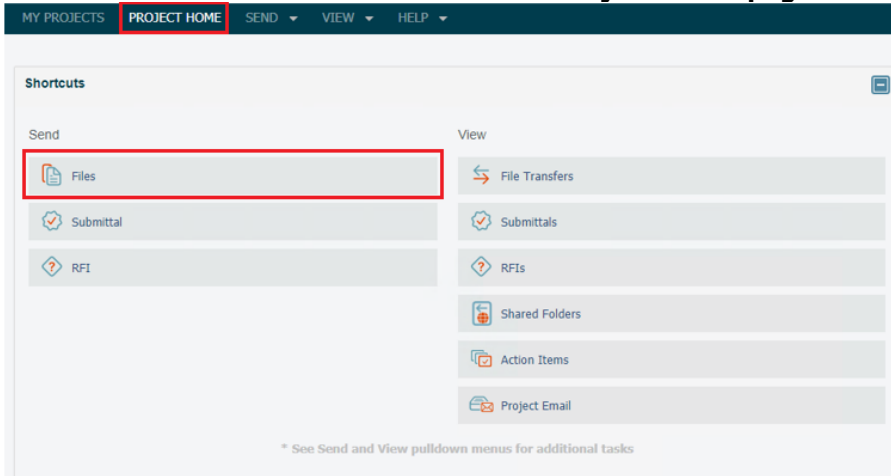
5. Once you select one of the download command buttons, you are prompted to either open the files or save them. Click **Save** to save them to your local machine or to the network. After the download completes, you can open the files.

To send files from Info Exchange

You can use Info Exchange to securely send file transfers of all sizes to project team members and track when the files were received.

Note that there is a default size limit for Info Exchange transfers. If needed, this limit can be adjusted by administrators and/or IT.

1. Log into Info Exchange and select the appropriate project.
2. Click **Send > Files** in the menu bar from the **Project Home page**:



3. Fill in the transmittal information, including selecting recipients for the file transfer from the project team members list:

Send a File Transfer

Subject:

To:

CC:

Remarks: **B I U S** Tahoma 2 (10pt) **A** [Rich Text Editor Icons]

Reminders: If a recipient has not downloaded the transfer, send notification to me, recipients on

Files:

4. Click **Add Files** to add files to the transfer.

Depending on your browser, you may also be able to drag and drop files to a transfer to upload them. Please see [Drag and Drop Files in a Transfer](#) for more information.

If you are sending a drawing file that contains external references, you must include the externally referenced files along with the original drawing.

- Click **Send Files** to send the file transfer.
- To track your file transfers, click **View > File Transfers** from the menu bar to open the **File Transfers log**, shown below:

Subject	Related Items	From	Date Sent	Expiration	Size	Access	Downloaded?
Project Transfer		Lori Beekman (Newforma)			614 KB	Recipients only	--

Total items: 1

- Click the **Subject** of the transfer to open the **Transfer page**, shown below:

Transfer

Subject: Project Transfer Date Sent: Expiration Date: CC: --

From: Adam Klose (Newforma)

To: Adam Klose

REMARKS FILES CHANGE LOG

DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED CONTENTS Configure Cloud Delivery

Name	Type	Size	Date Modified
Project Transfer	TASKS	--	--
kitchen.jpg	Image	615 KB	

- Click the **Change Log tab** to view the history of actions related to the transfer.

To send an RFI, Submittal or Change Order Proposal via Info Exchange

In addition to file transfers, external users can also send RFIs, submittals and change order proposals via Info Exchange. The workflow is very similar for each, so only the submittal workflow is shown in this guide.

- Log into Info Exchange and select a project. On the **Project Home page**, click **Send>Submittal** from the menu bar.

2018001.12 - One Oak Street 12

MY PROJECTS PROJECT HOME SEND VIEW HELP

Shortcuts

- Files
- Submittal
- RFI
- Change Order Proposal

Send

- Files
- Submittal
- RFI
- Change Order Proposal

View

- File Transfers
- Submittal
- RFIs
- Shared Folders
- Action Items
- Project Email

* See Send and View pulldown menus for additional tasks

- On the **Send Submittal** page, complete the submittal form. This includes the spec section, which can be selected from the drop-down list. Add the files you want to send with the submittal.

Send Submittal

Sender ID:

Subject: (Required)

To: Select contacts

CC: Select contacts

Action: For Review

Spec Section:

Remarks: **B I U S** Tahoma 2 (10pt) A

- Log into the site. You are directed to the **Submittal Forwarded page**. Click the **Files** tab, then click **Download All Contents** to download the contents of the submittal. You may also choose **Markup and Respond** if you would like to use the Newform web viewer to provide your markups.

You have been forwarded an item to review. Select Markup and Respond to view the Submittal _____, _____, with any comments and send the response.

Submittal Forwarded Submittals Send Response **Markup and Respond**

Subject: Walkway paving Transmittal ID: 00272
 To: Bob Welder 12 (MacDougall Construction 12) Date Sent: --
 CC: -- Via: Info Exchange
 From: Adam Klose 12 (Jefferson Mill Associates 12) Due: --
 Submittal ID: 00 21 00-00001
 Sender ID: --
 Purpose: For Review

To view and download, click [Walkway paving](#)

REMARKS * **FILES *** CONTENTS * EMAIL LOG

DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED CONTENTS

Name	Type	Size	Date Modified
<input type="checkbox"/> Walkway paving	TASKS	--	--
<input type="checkbox"/> Alpengrove - A208.pdf	Portable Document Format	846 KB	
<input type="checkbox"/> Transmittal_Submittal_-_00_21_00-00001_(Forwarded)_1.pdf	Portable Document Format	63 KB	

- Click **Send Response** to respond to the submittal.

You have been forwarded an item to review. Select Markup and Respond to view the Submittal files, markup with any comments and send the response.

Submittal Forwarded Submittals **Send Response** Markup and Respond

Subject: Walkway paving Transmittal ID: 00272
 To: Bob Welder 12 (MacDougall Construction 12) Date Sent: --
 CC: -- Via: Info Exchange

- Complete the **Send Submittal Response** page and click **Send Response**.

Send Submittal Response

Submittal ID: 00 21 00-00001

Subject:

To:

CC:

Action:

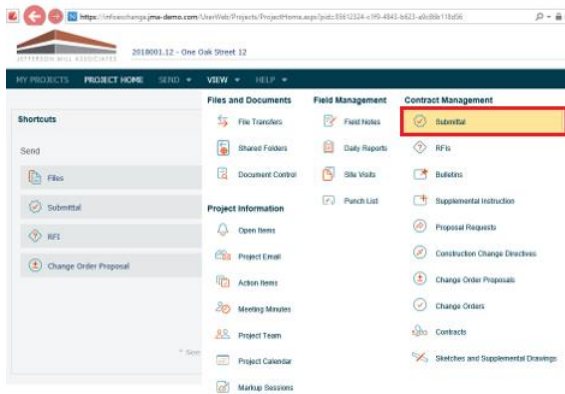
Response: **B I U S** Tahoma 2 (10pt) A

Reminders: If a recipient has not downloaded the transfer, send notification to me, recipients on

Files:

To upload files totaling more than the maximum, use [Newforma's Silverlight upload control](#).

5. You can track all your submittal activity in the corresponding log on Info Exchange. Click **View > Contract Management > Submittals**. Note that other activity center logs may be accessed this way:



6. The submittal log displays like this:

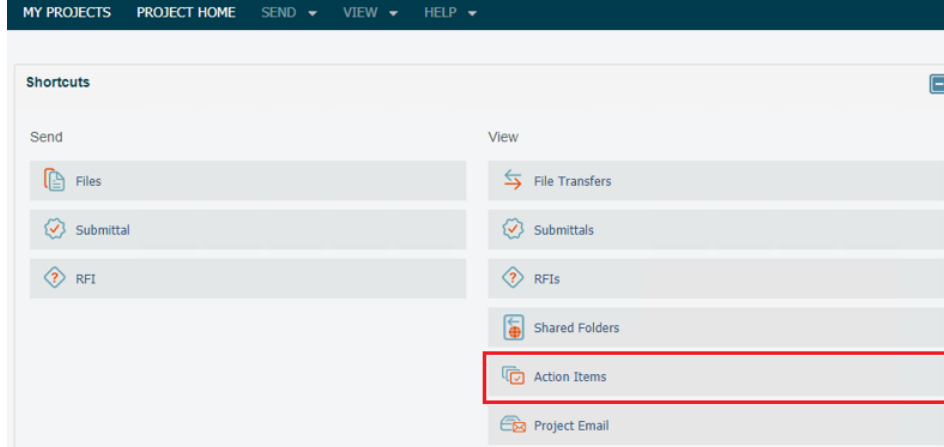
MY SUBMITTAL ACTIONS		MY EXPECTED SUBMITTALS					
Submittal		All My Actions					
ID	Sender ID	Subject	Received	Forwarded	Response	Closed	
10 20 10-00002		Kitchen information		3/31/2020 For Review	3/31/2020 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		
00 65 00-00001	03162020	Furniture	3/16/2020 For Review From: Bob Weller 12 (MacDougall Construction 12)	3/17/2020 For Review	3/17/2020 Pending From: Bob Weller 12 (MacDougall Construction 12)		
07 90 00-00001		Landscaping		3/16/2020 For Review	3/16/2020 No Exceptions From: Bob Weller 12 (MacDougall Construction 12)		
05 70 00-00001	1234	Windows		1/24/2020 For Review	1/24/2020 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		
99 10 00 A-00001		#12312019 - Kitchen		1/10/2020 For Review	1/10/2020 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		
21 10 02-00001	12312019	#12312019 - Kitchen		12/31/2019 For Review	12/31/2019 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		
00 11 00-00001		Information on project		11/15/2019 For Review	11/15/2019 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		
10 20 00-00006		Package 1		7/19/2019 For Review	7/19/2019 Reviewed From: Bob Weller 12 (MacDougall Construction 12)		

To view and update action items

Action items can be used to track project to-do items. For example, a project manager or other person can assign you a list of things you need to do, perhaps with due dates. If you have access to action items, you can view them and possibly update them from Info Exchange.

1. If you receive an email notification that you have been assigned an action item, you can follow the link in the email to log into the site and view or update the action item. You can also log into the site and click **View >**

Action Items from the menu bar or use the shortcut from the **Project Home**:



2. Click the action item **Subject** in the **Action Items log** to view it.

Action Items											
Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority	Status	Action Completed	Supporting Documents		
	00162	Review drawings		Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		--		
	00166	Hole in wall		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file		
	00168	Order wallpaper		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress		--		
1	00170	Friday meeting prep		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		--		

3. View the main information and see additional information on the **Description, Discussion, Email Log, Supporting Documents, Related Items** and **Change Log** tabs on the **Action Item page**.

Action Item

Subject: Review drawings ID: 00162

Status: Not Started Type: Action Item

Percent Complete: 0 % Priority: Normal

Assigned: Disciplines:

Due Date: Assigned To: Bob Welder 12 (MacDougall Construction 12) and one other

Remind: disabled CC: --

Action Completed: Assigned By: Adam Klose 12 (Jefferson Mill Associates 12)

Keywords:

DESCRIPTION DISCUSSION EMAIL LOG SUPPORTING DOCUMENTS RELATED ITEMS CHANGE LOG

review included drawings.

- You may have rights to edit action items. To update an action item, click **Modify** to open the **Modify Action Item page**. For example, you can change the status or add notes in the **Description** field regarding progress on the item. Select **Save and Close** when done.

Modify Action Item

Subject:

Type: ID:

Status: Disciplines:

Percent Complete: Assigned To:

Priority:

Assigned:

Due Date:

Remind days before due CC:

Action Completed: Assigned By:

Keywords:

DESCRIPTION DISCUSSION EMAIL LOG SUPPORTING DOCUMENTS RELATED ITEMS CHANGE LOG

B I U S Tahoma 2 (10pt) A [font settings icons]

review included drawings.

SAVE SAVE & CLOSE CANCEL Send change notification email

To create action items

- Based on your permissions, you may have the ability to add new action items. Click **Add Action Item** in the **Action Items log**.

Action Items											
	Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority	Status	Action Completed	Supporting Documents	
		00162	Review drawings		Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started			
		00166			Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file	
		00168	ir		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress			
		00170	Friday meeting prep		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started			

- Fill out the fields on the **Add Action Item dialog box** as desired, including **Subject, Status, Priority, Due Date** and **Description**. You can assign it to a team member using the **Assigned To** drop-down if desired. If you assign the action item to a team member, leave the **Send Change Notification Email** checkbox selected. Click **Save and Close** when done.

Add Action Item
✖

Subject:

Type: ID:

Status: Disciplines:

Percent Complete: Assigned To:

Priority:

Assigned:

Due Date:

Remind days before due CC:

Action Completed: Assigned By:

Keywords:

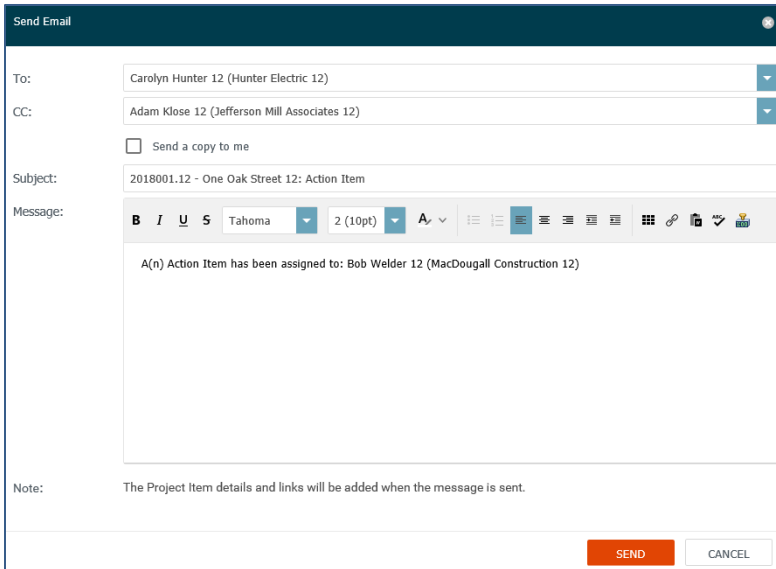
DESCRIPTION
DISCUSSION

B *I* U **S**

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Send change notification email
 SAVE
SAVE & CLOSE
CANCEL

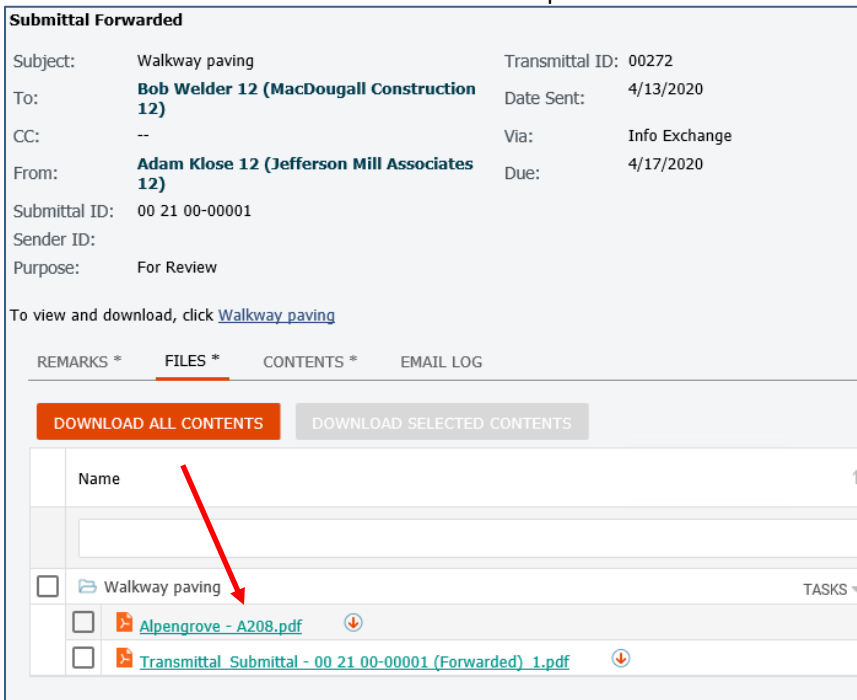
- If you selected **Send Change Notification Email**, the **Send Email dialog box** appears. Add recipients and make other changes as needed. Click **Send** when ready. People in the **To:** and **CC:** fields receive an email notification of the action item.



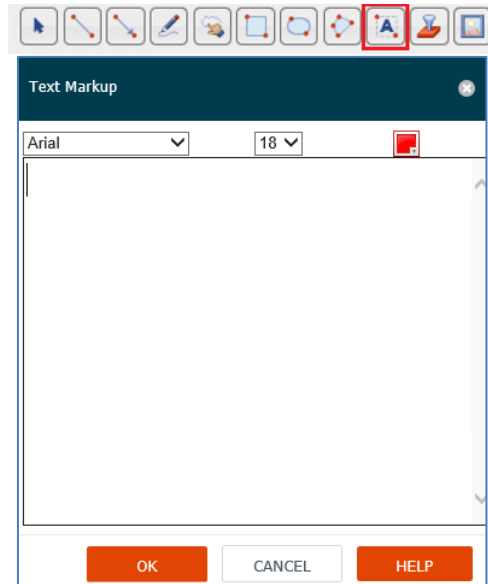
To use Newforma Web Viewer to markup or stamp files

You can use the Newforma Web Viewer to view, stamp, and markup most image files, including PDFs. You can pan and zoom in a file, use search to locate text, navigate pages in a multipage file, insert an image or stamp, export to PDF, or create a new markup session.

- Locate the file and click on the file name to open it in the **Newforma Web Viewer**.



- To add text in the markup, click **Text** on the toolbar. Click where you want to locate the text box. Enter your text and click **OK**.



- Use other buttons on the toolbar to add clouds, lines, and more. Use **Select** to select markups and move them. To delete a markup, select the markup and press **Delete** on your keyboard.

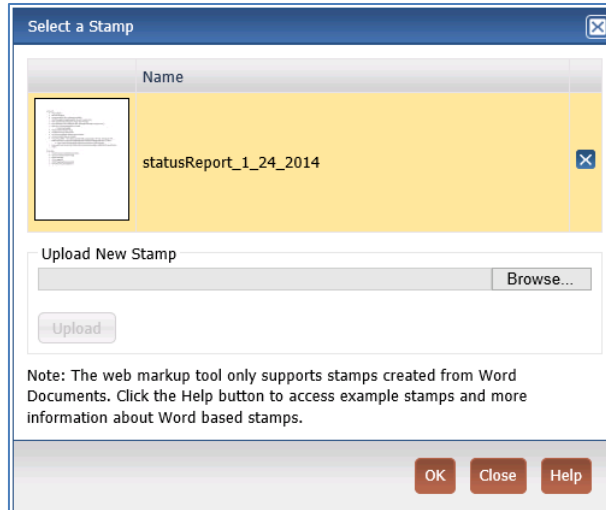


- You can insert images and stamps as part of your markup. Adding a stamp is similar to adding an image, but the stamp must be prepared before you can add it to your markup. The Newforma Web Viewer supports adding stamps created in Microsoft Word.

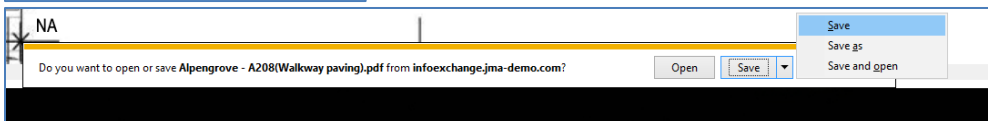
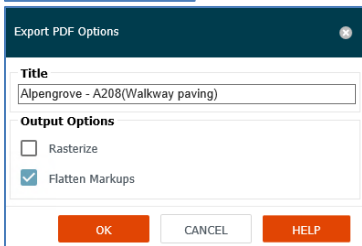


Refer to the online help topic [Add a New Stamp](#) for more details on how to create a stamp.

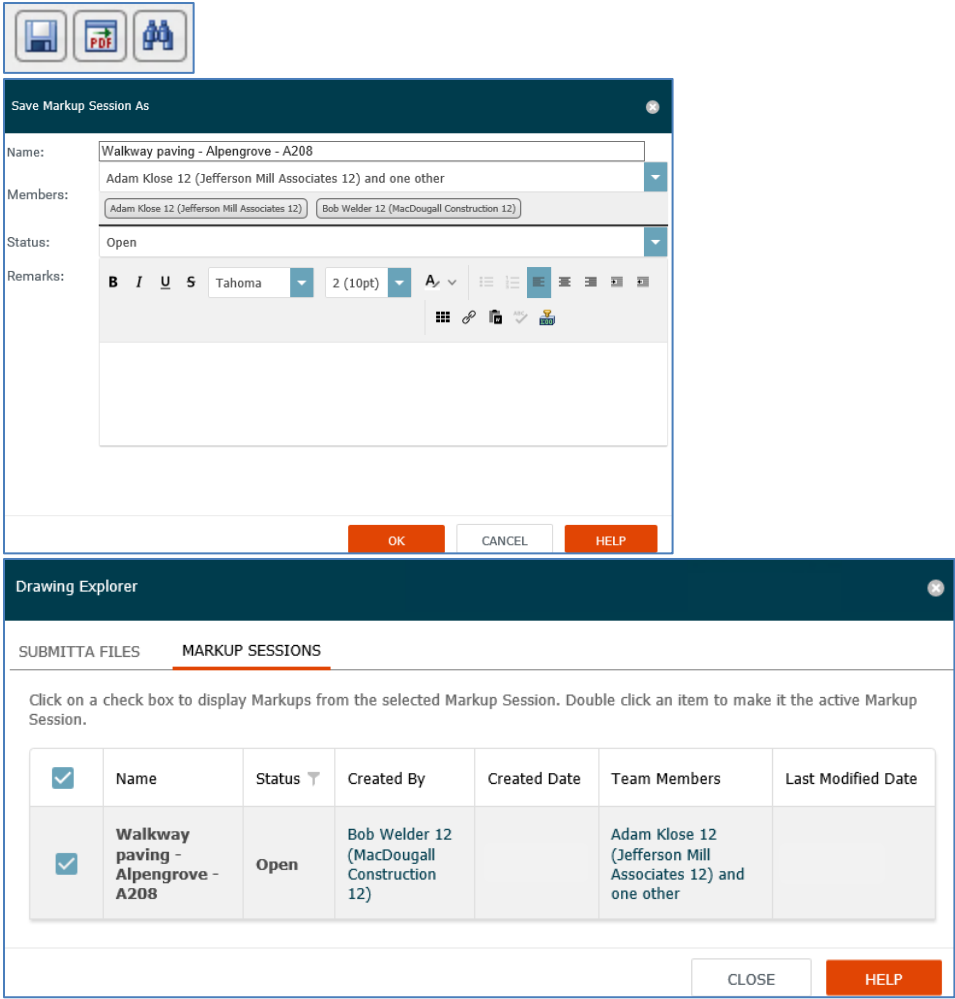
8. **Stamps:** After clicking **Insert Stamp** in the toolbar, the **Select a Stamp dialog box** appears. If this is the first time the stamp is being used, you need to click **Browse** to locate the stamp, then click **Upload**. After the stamp is uploaded, it appears at the top of the list of stamps in the **Select a Stamp** dialog box. It is also available for use by others in your company. Select the stamp **Name** from the list and click **OK**.



9. Fill out any additional information needed in the **Edit Stamp Contents dialog box**, then click **OK**. The stamp is placed in the markup. Reposition the stamp as needed.
10. To create a PDF, click **PDF** on the toolbar. In the **Export PDF Options dialog box**, enter a name, select your output options and click **OK**. Use the Windows bar at the bottom of the screen to open or save the PDF in the location of your choice.

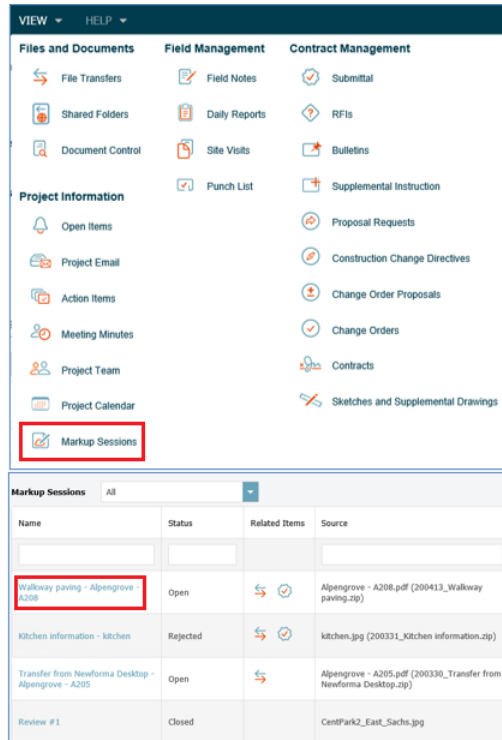


11. To save your markup session for later editing or viewing by you and others, click **Save** on the toolbar. In the **Save Markup Session As dialog box**, enter a name for the markup session. Optionally, you can add additional members from the project team, change the status and add remarks. Click **OK** when done. The **Drawing Explorer dialog box** opens to show the markup session. Click **Close** when done.



12. Click **Close** in the upper right hand corner to close the viewer.

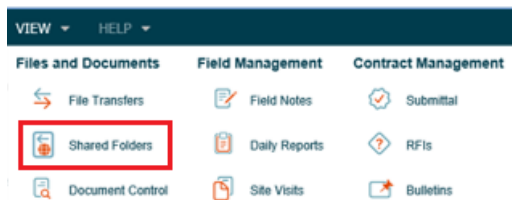
13. To reopen the markup session, click **View > Project Information > Markup Sessions**. Click the **Name** of the markup session you want to open in the **Markup Sessions log**.



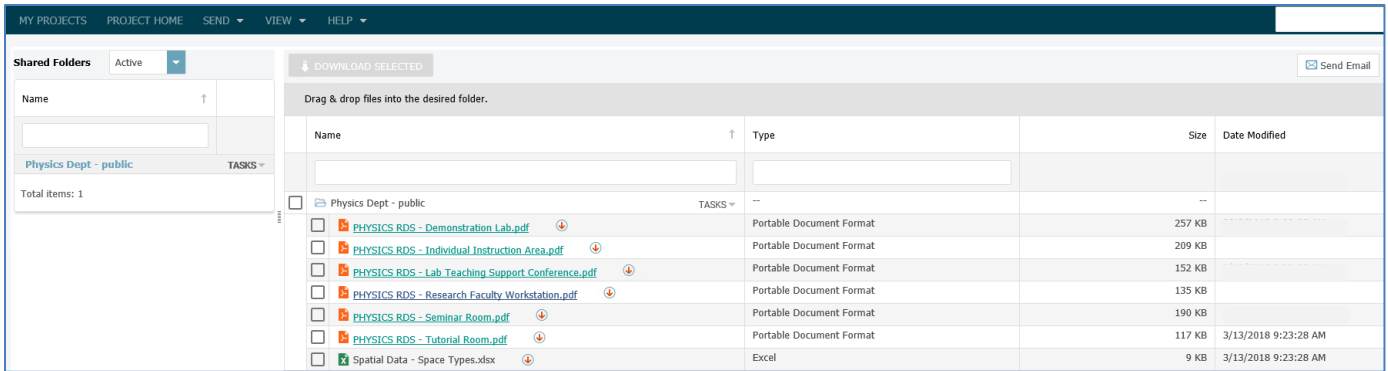
To download files from shared folders on Info Exchange

Info Exchange allows you and other project members to share information securely through dynamic folders that are synchronized with the website.

1. You may receive a notification email when there is something new in a shared folder. Follow the link in the email to log into the site and download the files, or log into the site and click **View > Files and Documents > Shared Folders**.



- In the **Shared Folders log**, click the name of a shared folder to view its contents in the **Folder Contents** panel, shown below:

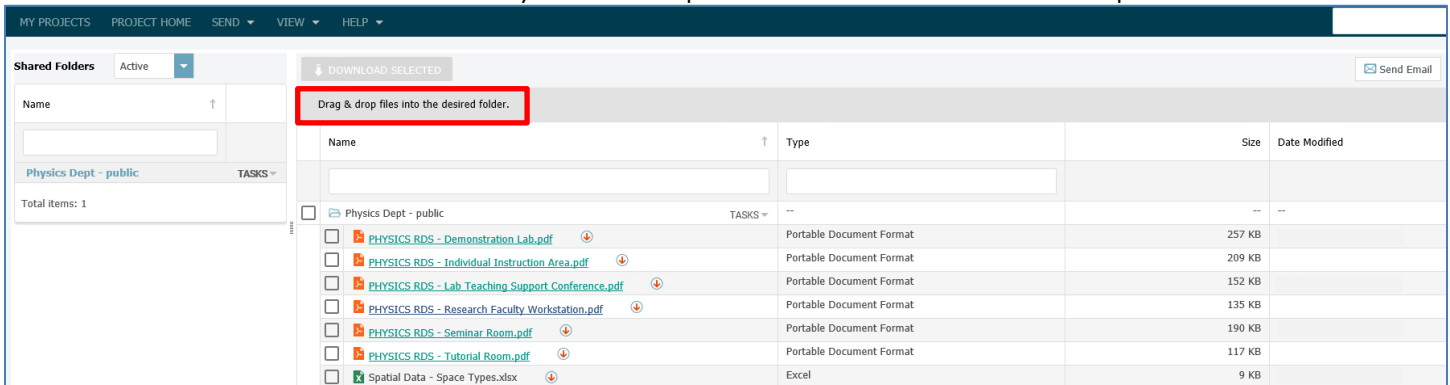


- Click the **Tasks** drop-down for the shared folder and select **Download Folder** to download all files in the folder. You can also download specific files and subfolders by marking the checkbox next to the them and clicking **Download Selected**.

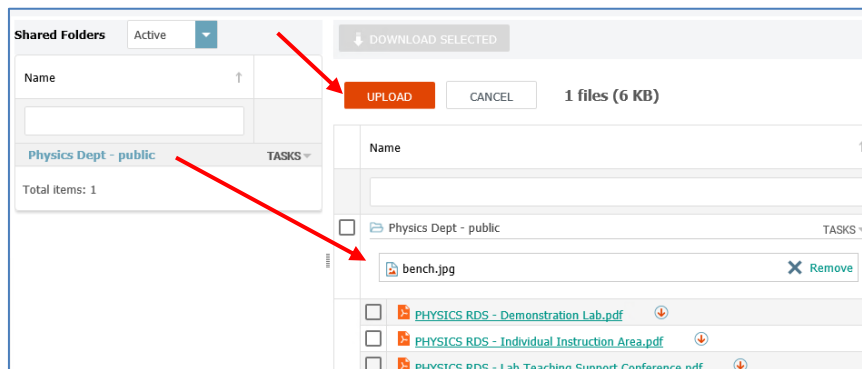
To upload files to shared folders

You may also have rights to upload new information to the shared folders through the website.

- After logging in, go to **View > Files and Documents > Shared Folders** to open the **Shared Folders log**.
- Click the name of the shared folder where you want to upload files in the **Folder Contents** panel.



- Drag and drop files into the desired folder. There will be a preview of where the files will go prior to choosing **Upload**.



- To track your upload and which recipients downloaded the new files, click the shared folder in the **Folder Contents** panel, then select **Folder Details** from the **Tasks** drop-down. Click the **Change Log** tab to view the folder status.

Action	Date	Member
Published		Adam Klose 12 (Jefferson Mill Associates 12)
Partially Downloaded		Bob Welder 12 (MacDougall Construction 12)
Expired		Adam Klose 12 (Jefferson Mill Associates 12)
Republished		Adam Klose 12 (Jefferson Mill Associates 12)
Partially Downloaded		Bob Welder 12 (MacDougall Construction 12)

To use Newforma ID

Newforma ID provides a single sign-on to all Newforma projects in which users have been invited to participate. **Newforma ID** is required to log into Newforma Mobile Apps and integrated cloud storage services, as well as projects managed via Newforma Info Exchange.

- Go to the **Sign in to Newforma Info Exchange** page and click **Newforma ID** to log in using Newforma ID or to **create your Newforma ID**.