Document Sets Quick Reference Guide

This topic provides a reference for the Project Center **Document Sets** activity center.

Purpose

Use Newforma document sets to manage your project's key deliverables and keep information related to a particular task together without moving, copying, or in any way affecting the actual underlying files.

Audience

Internal Newforma Project Center users.

Key Features

- Assemble and manage your project's key deliverables into a virtual folder of files from anywhere within the project information.
- Create record copies of document sets for milestone or other purposes.
- Compare document sets with other document sets, project folders, or record copies.
- Distribute specific sets of files to external project team members as a transmittal via Info Exchange or through a shared folder.
- Create an image gallery document set to share photos on the Info Exchange website.

To create a document set

1. From the **Project Document Sets** activity center, select **Create Document Set** in the **Tasks** panel.
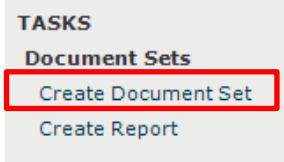
2. In the **Create Document Set dialog box**, enter a **Name** for the set, then select the **Contents** tab. Select **Add Files** or **Add Folder** to browse and select files you want to add to the set. Use **Add Files** or **Add Folder** as many times as needed to select files in different locations. Select **OK** when done.
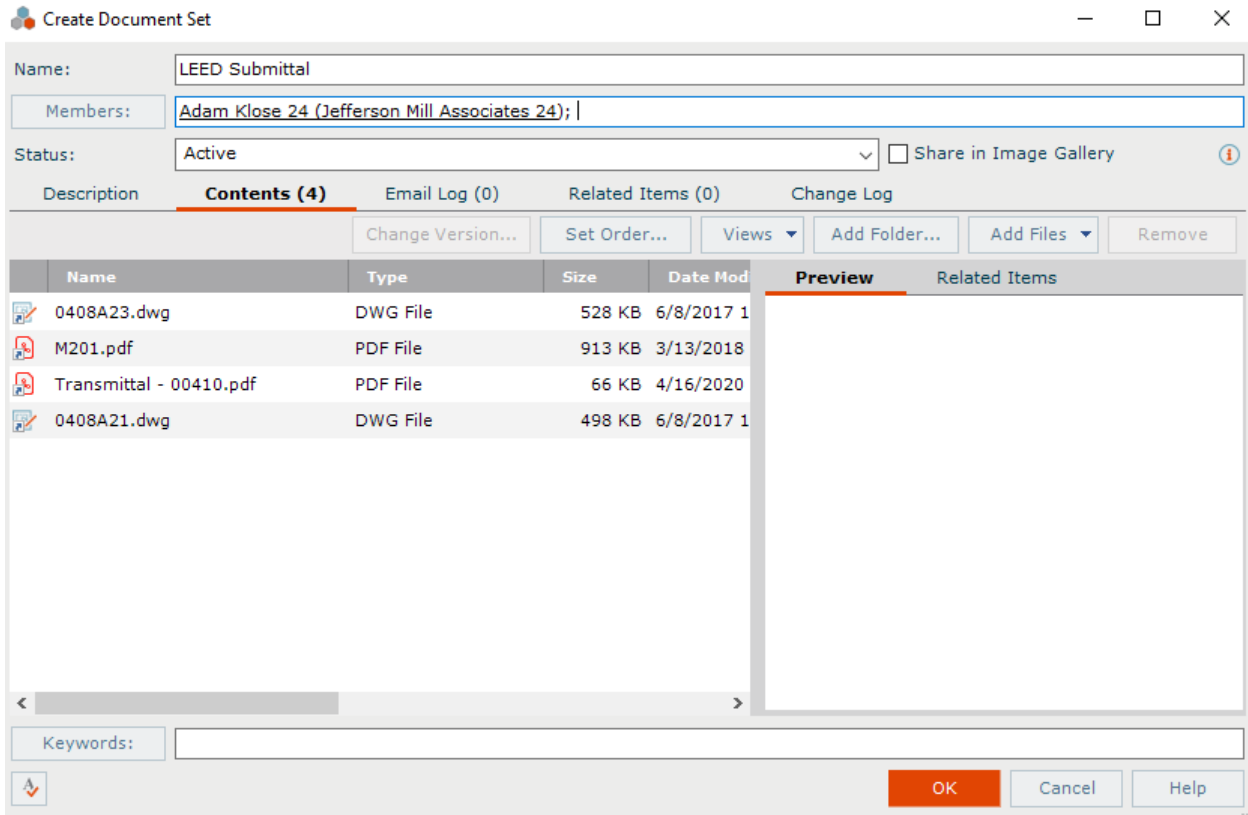
*Files shown on the **Contents** tab are not copies of files, but are links to the actual project files on your server. When opened, they bring up the latest copy from your project files.*

*Using **Add Folder** does not automatically add files from subfolders. Files in subfolders need to be added as a separate step.*

*If you choose **Add Folder**, any files added to that folder in the future will automatically be added to the document set.*
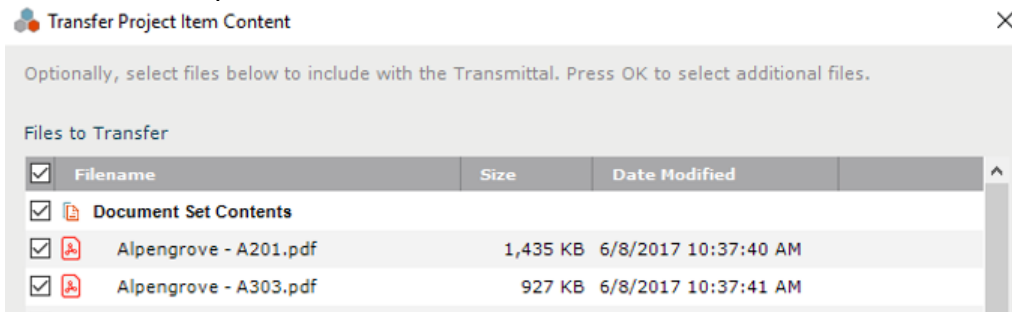
To distribute a document set

You can easily distribute the files in a document set through email or Info Exchange.

1. To distribute via an Info Exchange transfer, select the document set and select **Info Exchange > Transfer and Log Transmittal** in the **Tasks** panel.
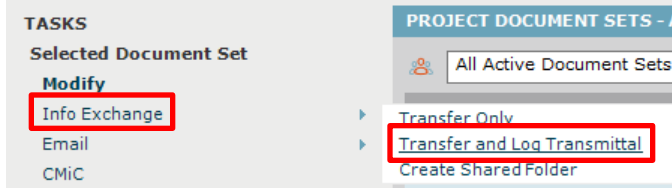
2. Select the files you want to transfer and click **OK**.

3. The **Transfer Files and Create an Outgoing Transmittal dialog box** opens. Enter the recipient(s) in the **To** field, fill out any other information and click **Create and Transfer**.
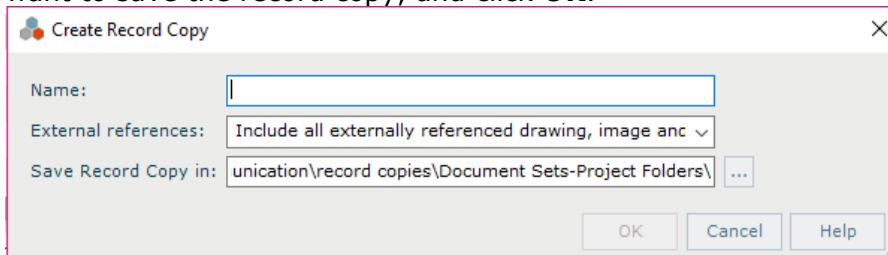
To create a record copy of a document set

To make a copy of files in a document set for milestone or other purposes, you can create a record copy.
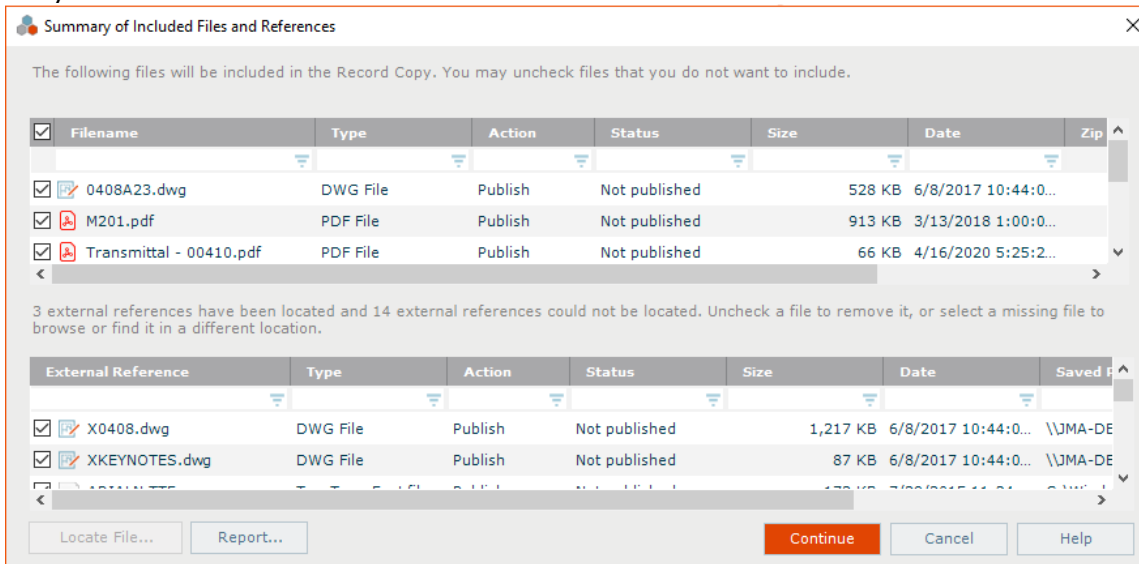
1. Select the document set and click **Create Record Copy** from the **Tasks** panel.
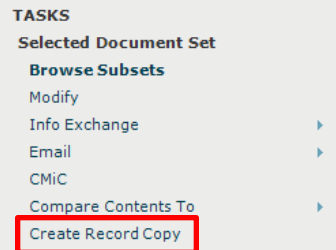
2. Give the record copy a **Name**, indicate if you want to include external references, indicate where you want to save the record copy, and click **OK**.

3. If you opted to include external references, Newforma searches for and displays any references found for you to confirm or remove.


4. Click **Continue** to finish creating the record copy.

To compare document sets

You can compare document sets to other document sets, record copies, or project folders to see what files have been added, removed, changed, or have remained unchanged.

1. Select the document set and select **Compare Contents To** from the **Tasks** panel. Choose to compare it to a folder, another document set, or a record copy.
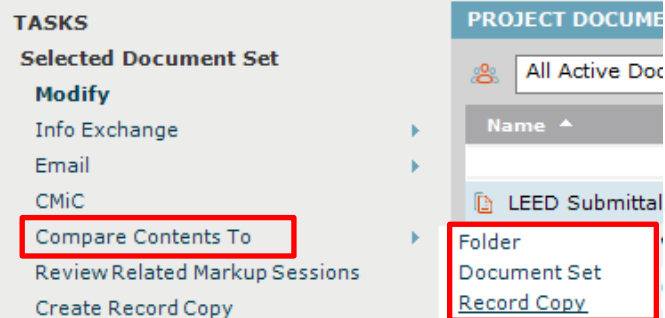
2. A dialog box opens for you to select the folder, document set, or record copy to compare to.
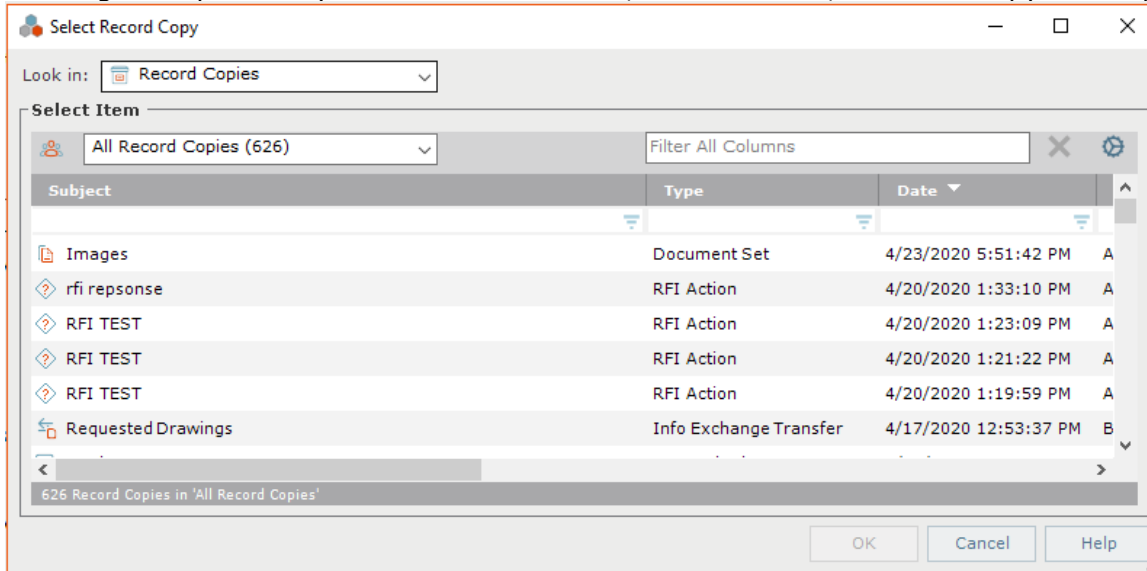
3. Once selected, the **Compare Results** window opens. A logical comparison would indicate the older set of files in the **Baseline** selection and the newer set of files in the **Revised** selection. If needed, you can click **Swap Baseline and Revised Selections** from the **Tasks** panel. Use the color key to understand which files were added, removed, changed or left unchanged between the sets.

To view document sets on Info Exchange - Internal users only

As soon as a document set is created, the contents are available for internal users on the Info Exchange website. This is a great way to make files available to users when working in the field.

1. Internal project team members can view and open files from document sets on the Info Exchange website. To do this, select **View > Files and Documents > Document Sets** from the menu bar.

2. Click on a document set **Name** to see the files. You can select each file to view or select the download icon.

To create an image gallery on Info Exchange

A document set can be created to share photos on the Info Exchange website for both internal and external project team members to view. You can create up to three image galleries.

1. To create an image gallery, set up a document set as normal, but also check **Share in Image Gallery**, then select **A**, **B**, or **C** from the drop-down.

2. Use **Add Files** or **Add Folder** to add image files to the set. Click **OK** when done.
3. The document set is automatically set as a shared folder and the image gallery can be added as a widget to the **Project Home page** on the Info Exchange website.
4. To add the image gallery to your **Project Home** page, log into Info Exchange, pick the project, then select the **Customize** link.

5. Select the image gallery from the **Available Widgets** and click the left, middle, or right placement.
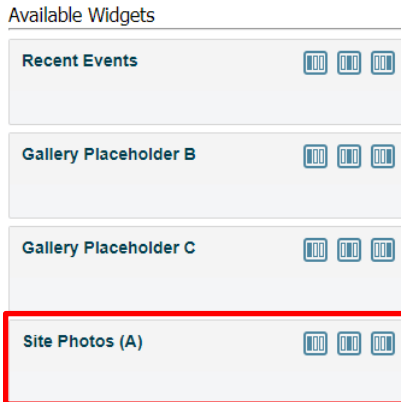
6. For example, selecting the middle placement puts the image gallery in the middle of the existing widgets of the default **Simple View**. Click **Save** when done.
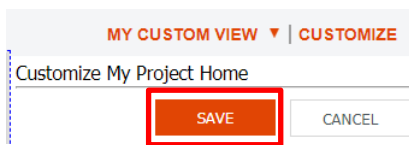
7. The image gallery appears on your **Project Home** page.