Info Exchange Quick Reference Guide

This topic provides a reference for the Project Center **Info Exchange** activity center.

Purpose

An easy alternative to the FTP server, with additional logging, tracking, notifications, and document expiration management built in.

Audience

Anyone in your organization that needs to send, receive and track file transfers of any type or size.

Key Features

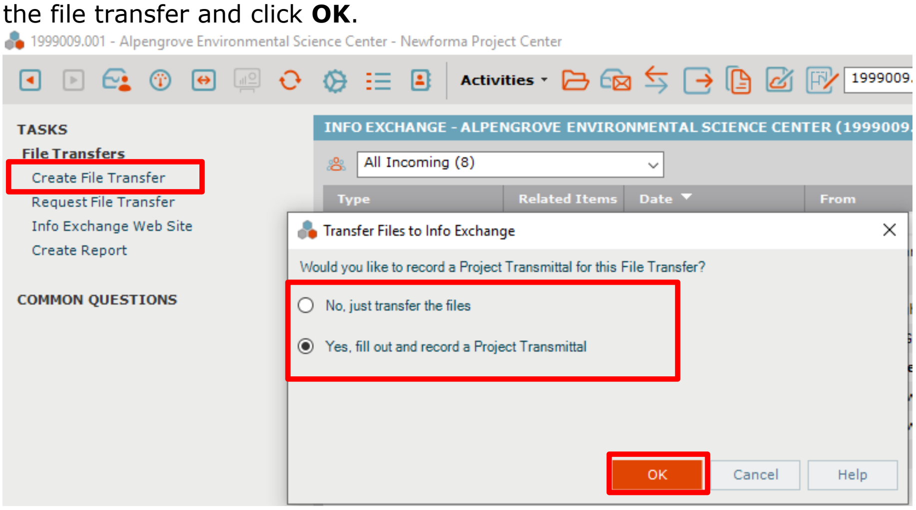
- Manage the transmittal process and share information easily, no matter what the file size.
- Log and track all published information; send notifications and manage file expiration.
- Support external team members with easy, web-based access to transmittals, submittals, RFIs and more.

Using Info Exchange

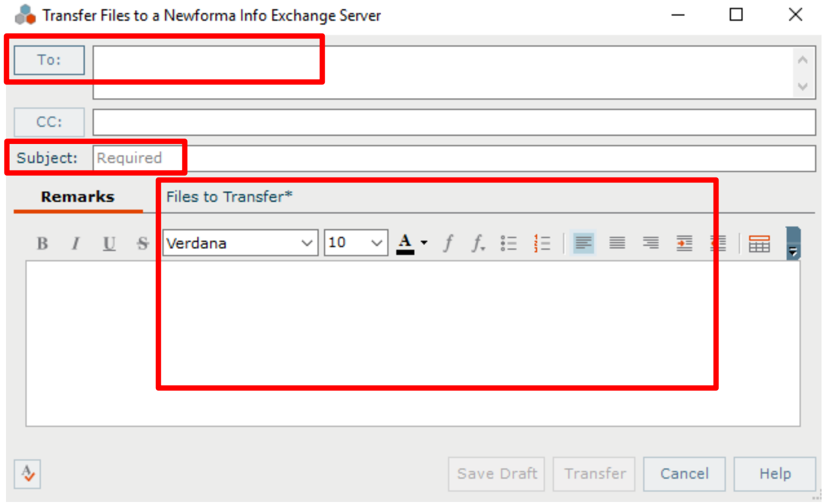
To send file transfers

> *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. Go to the **Info Exchange** activity center. From the **Tasks** panel, select **Create File Transfer**.
   In the **Transfer Files to Info Exchange dialog box**, select whether or not you want to create a transmittal for the file transfer and click **OK**.

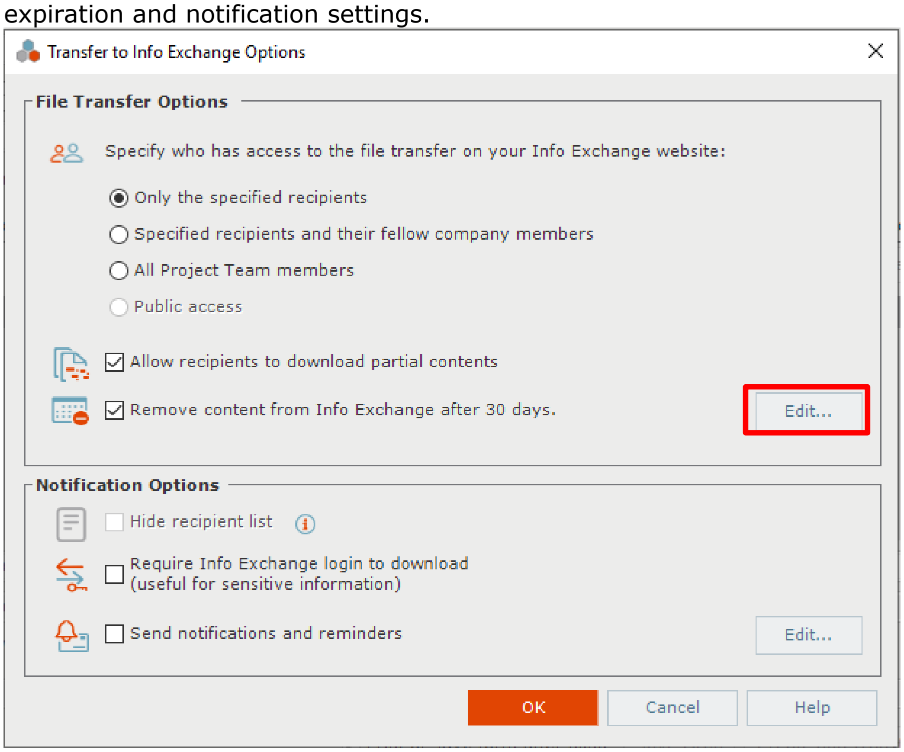


2. In the **Transfer Files to a Newforma Info Exchange Server dialog box**, shown below, enter recipients in the **To:** field.



Info Exchange transfers can be sent to any email address. Recipients do not need to be part of the project team, although it is recommended.

3. Add a **Subject** for the transfer.
4. Select the **Files to Transfer** tab and **Add Files** or **Add Folder** of files to send.
5. Click **Transfer**.
6. On the next screen, select the appropriate visibility, expiration and notification options. Click **Edit** to change expiration and notification settings.

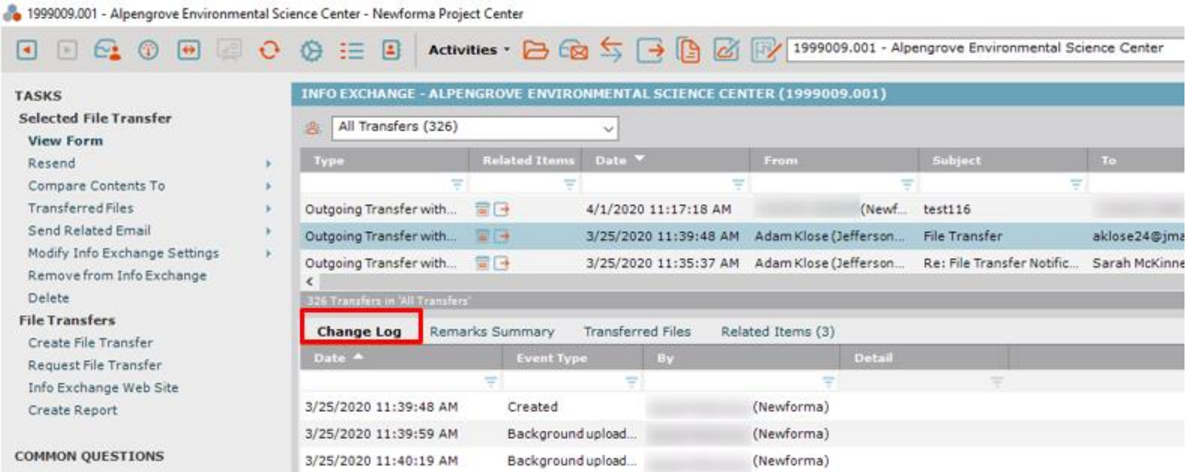


7. Click **OK** to transfer the files.

To manage file transfers

You can monitor the activity of a file transfer from the **Info Exchange** activity center.

1. To see who has downloaded files, select the desired transfer and then select the **Change Log** tab.

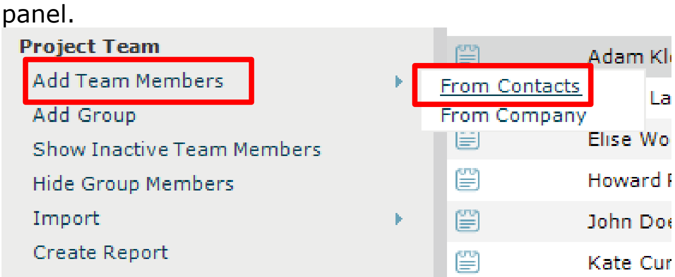


To add external users to the Project Team

Add external users to the project team so they can send you files via the Info Exchange website and benefit from the same tracking and reliability.

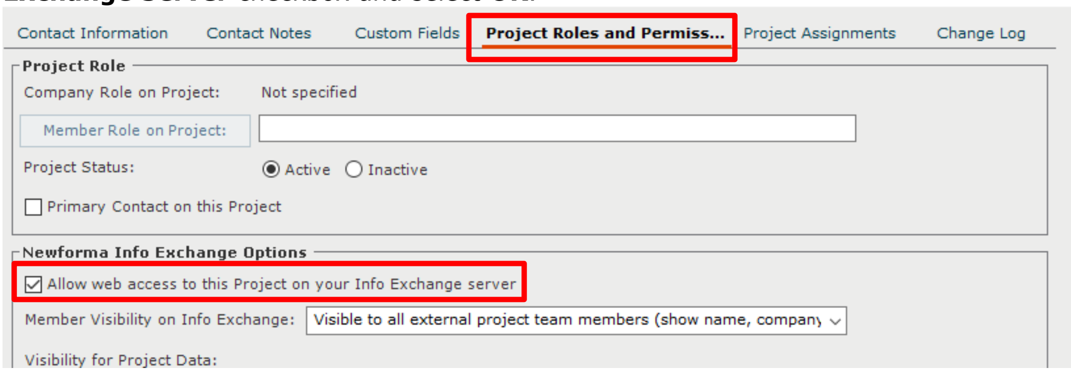
> *External users must be a member of the project team with web access to this project in order to send files via Info Exchange.*

1. Go to the **Project Team** activity center and select **Add Team Members > From Contacts** from the **Tasks** panel.



2. Select the check box for the team member in the **Choose New Team Members from Global Contact List dialog box** and select **OK**.

3. In the **Add Project Team Members dialog box**, select the **Allow Web Access to this Project on Your Info Exchange Server** checkbox and select **OK**.



The first time an external user is given web access to any of your projects, the user automatically receives an email with login credentials.

External users can only see items sent directly to/by them on Info Exchange.

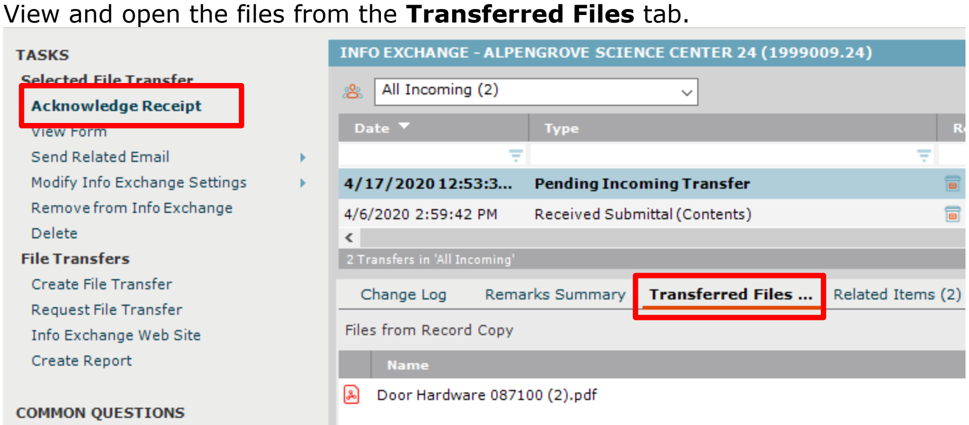
To receive file transfers

When someone sends you files via your Info Exchange website, you receive an email notification. You can follow the link in the email to receive or acknowledge the transfer.

1. In the **Info Exchange** activity center, highlight the **Pending Incoming Transfer**. Select **Acknowledge Receipt** from the **Tasks** panel to acknowledge receipt of the transfer.

   *When the Project Center Server is configured to automatically download file transfers from Info Exchange, you will see the **Acknowledge Receipt** option. The files are already downloaded and available on the **Transferred Files** tab. If the server is not configured to automatically download file transfers, the **Receive Pending File Transfer** task appears. Select it to download the file transfer.*

2. View and open the files from the **Transferred Files** tab.



For additional information on how external users work with Info Exchange, please refer to the **Newforma Info Exchange Quick Start Guide for External Users**.