NEWFORMA.

# Newforma Project Center Basic User Guide

Newforma Project Center 2022

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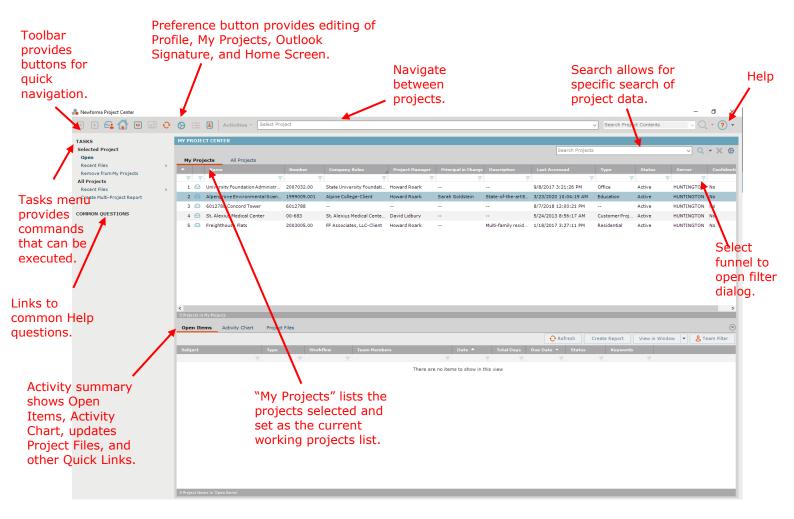
## **Newforma<sup>®</sup> Project Center User Guide**

#### **Overview**

Newforma Project Center (NPC) is a project information management (PIM) solution that creates a more productive environment for project managers and their teams by organizing project information, facilitating information exchange with external team members, and enabling more efficient contract and construction management processes. NPC integrates information from multiple sources, such as CAD, Microsoft<sup>®</sup> Office, PDF files and email, enabling search, compare, review, mark up, transfer and management of project information more effectively.

NPC organizes and provides context for project information through a suite of tools that all project team members will find useful.

#### **General Navigation**



## **Getting Started Using Newforma Project Center**

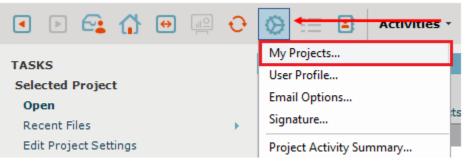
#### **My Project Center**

My Project Center allows users to create a list of frequently used projects on the **My Projects** tab. Users can also see a list of all projects available in Newforma on the **All Projects** tab. My Project Center also includes a Project Activity Summary or dashboard view of action items, submittals, transmittals, Info Exchange, and email for a selected project.

#### **Edit My Projects**

Creating the **My Projects** list is one of the first tasks a new user should perform in Newforma. This list not only facilitates accessing frequently used projects, but makes filing email into Newforma a simple drag and drop activity.

1. Select the Preferences icon and select **My Projects**. to access the **Edit My Projects** dialog.



2. In the Edit My Projects dialog box, click Add. The All Projects list appears.

Edit My Projects			~
Add projects to the My Projects list. Click th position in list. Active Projects:	ne header to s	ort, drag projects between lists, or drag to o Unused Projects:	:hange
Project Name	Number	Project Name	Number
🖂 Alpengrove Environmental Science Ce	1999009.00		
🖂 6012788 Concord Tower	6012788		
<u> </u>	>	<	>
Add		Remove	
		Save Changes Cancel	Help

3. Select the checkboxes of the projects to include in the **My Projects** list. Click **OK** to return to the **Edit My Projects** dialog.

🜲 Select Projects			×
Search Project	S		✓ Q + X ⊗
All Projects			
Location: NH	~		
Name 🔻	Number	Company Roles	Project Man
<u>₹ R</u> <del>₹</del>	1	Ŧ	Ŧ
🔲 🗠 🛛 Zuhair Fayez Partnership	00-594		Rob Kirk
🗌 🖂 ZNS Enginee ing LC	00-187		Michael Estrac
🗌 🖂 Zimmerman	Zimmerman		David Lidbury
🗌 🖂 🛛 Zimmer Gunsul Frasca Architect	00-339		Rick Saladino
🗌 🖂 Ziger-Snead LLP	00-651		Zak Ruck
🗌 🖂 Ziegler Cooper Architects	00-702		Michael Estrac
<			>
1,024 Projects in NH - 834 showing after filter			
		ОК	Cancel Help

4. Review the selected projects and click **Save Changes**. The selected projects appear in the **My Projects** list.

💑 Edit My Projects					×
Add projects to the My Projects list. Click t Active Projects:	he header to sort, drag	g projects between list Unused Projects:	s, or drag to change (	position in list.	
Project Name	Number	Project Name		Number	
🖂 Alpengrove Environmental Science Ce	1999009.001				
🖂 6012788 Concord Tower	6012788				
🖂 St. Alexius Medical Center	00-683				
🖂 Freighthouse Flats	2003005.00				
University Foundation Administration	2007032.00				
Add		Remove			
			Save Changes	Cancel H	elp .

#### Change the project order

1. The order in which the projects appear in **My Projects** can be modified by simply dragging and dropping the projects in the **Active Projects** list in the **Edit My Projects** dialog.

🜲 Edit My Projects		🜲 Edit My Projects				
Add projects to the My Projects list. Click th Active Projects:	ne header to sort, drag	Add projects to the My Projects list. Click the header to sort, dra Active Projects:				
Project Name	Number	Project Name	Number			
🖂 Alpengrove Environmental Science Ce	1999009.001	Oniversity Foundation Administration	2007032.00			
🖂 6012788 Concord Tower	6012788	Alpengrove Environmental Science Ce	1999009.001			
🖂 St. Alexius Medical Center	00-683	🖂 6012788 Concord Tower	6012788			
🗠 Freighthouse Flats	2003005.00	🖂 St. Alexius Medical Center	00-683			
🗇 University Foundation Administration	2007032.00	🖂 Freighthouse Flats	2003005.00			
Add		Add				

2. Click **Save Changes** in the **Edit My Projects** dialog to save the new project order.

Once the changes are saved, email folders will be created in Outlook that will appear under the **Newforma Items to File** folder.

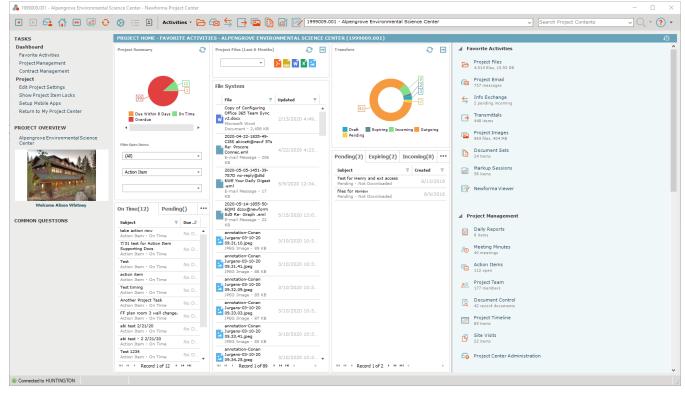
#### Get started in a project

1. Double-click on a My Projects item to open a project.

Newforma Project Center													
< ▶ 🚰 🖨 🚇 ·	0	⊜ :≡	Activities * Select Pro	ject								✓ Sea	arch Proje
TASKS		MY PROJE	CT CENTER										
Selected Project											Search	Projects	
Open		My Pro	jects All Projects										
Recent Files Edit Project Settings		<b>^</b>	Name 🔺				Principal in Charge	Description					Confide
Show Project Item Locks		29 🖂	Health Clinic	12345654321				The clinic test pro	3/6/2020 4:48:54 PM	Health Care	Active	HUNTINGTON	No
Setup Mobile Apps		28 🖂	Alpengrove Environmental Scien	1999009.001	Alpine College-Client	Howard Roark	Sarah Goldstein	State-of-the-art E	5/15/2020 3:10:00 PM	Education	Active	HUNTINGTON	No
Remove from My Projects													

#### **Project Home**

A project is the basis for all Activity Centers in Newforma Project Center. After double-clicking a project from **My Projects** the **Project Home** screen opens and shows the Dashboard and available Activity Centers for that project. Below is an example:



To change the Dashboard View, click the **Toggle Dashboard** icon <sup>[]</sup>. There are two additional dashboard views:

• Click once to see only the Dashboard View:

🜲 1999009.001 - Alpengrove Environmental	Science Center - Newfo	rma Project Center									-	
s 🖻 🚭 🛟 🖻 🧾 😋	• ⊗ :≡ ⊜	Activities *	∋ 📾 与 📑 🖬		💰 📝 1999009.001 - Alpengrove En	vironmental Science Center			✓ Search Pr	oject Contents	~ O,	• ?
TASKS	PROJECT HOME -	FAVORITE ACTI	VITIES - ALPENGROVE EI	VIRONM	MENTAL SCIENCE CENTER (1999009.0	01)				Refreshe	l 1 minute(s) ago	• <del>()</del> @
Dashboard Favorite Activities	Project Summary			Ð P	Project Files (Last 6 Months)		0 E	Transfers				Ð B
Project Management Contract Management Project					•	) 🔜 🐨 🗶						
Edit Project Settings Show Project Item Locks			-12	F	File System						2	
Setup Mobile Apps Return to My Project Center	3	99-			File Copy of Configuring Office 365 Team S v2.docx	Updated     //13/2020 4:4	Ŧ		81		2	
		ue Within 8 Days	On Time Deardus		Microsoft Word Document - 2,458 KB 2020-04-22-1835-49-CI5S akivett@nev							
PROJECT OVERVIEW Alpengrove Environmental Science	_				5Ts Re- Procore Connec.eml E-mail Message - 206 KB	4/22/2020 4:	23 PM		Draft Expiring	Incoming Outgoing	Pending	
Center	Filter Open Items: (All)		.	E-mail Message - 17 KB	5/5/2020 12:	34 PM	Pending(2)	Expiring(2)	Incoming(8)	Outgoing(	(01)	
All and a second second			_	2020-05-14-1855-50-6QMJ dcox@newf Sd5 Re- Graph .eml	5/15/2020 12:1	00 PM	Subject	expiring(2)		Created	(01)	
	Action Item	MC0011105111 *		-	E-mail Message - 22 KB annotation-Conan Jurgens-03-10-20 09.31.10.jpeg	2/10/2020 10/2			nd ext access ownloaded			3/13/20:
				-	JPEG Image - 89 KB annotation-Conan Jurgens-03-10-20			files for review Pending - Not D	ownloaded			8/9/20:
Welcome Alison Whitney	On Time(12)	Pending()	Overdue(99)		09.31.41.jpeg JPEG Image - 88 KB	3/10/2020 10:3	81 AM					
COMMON QUESTIONS	Subject		😤 Due Date 📑		annotation-Conan Jurgens-03-10-20 09.32.09.jpeg JPEG Image - 85 KB	3/10/2020 10:3	32 AM					
		n Item Supporting D	No Due Dat	- 11	annotation-Conan Jurgens-03-10-20 09.33.03.jpeg JPEG Image - 87 K8	3/10/2020 10:3	3 AM					
	Action Item - On T Test Action Item - On T		No Due Dat		annotation-Conan Jurgens-03-10-20 09.33.41.jpeg	3/10/2020 10:3	3 AM					
	action item Action Item - On T		No Due Dat	e	JPEG Image - 85 KB annotation-Conan Jurgens-03-10-20 09.34.25.jpeg	3/10/2020 10:3						
	Test timing Action Item - On T	Test timing No Due Date Action Item - On Time No Due Date Another Project Task Action Item - On Time No Due Date		e -	JPEG Image - 79 KB annotation-Conan Jurgens-03-10-20	5/10/2020 10:3	04 AU1					
	Action Item - On T			e	09.35.02.jpeg JPEG Image - 87 KB	3/10/2020 10:3	35 AM					
	FF plan room 3 wall change. Action Item - On Time No Due Date		•	annotation-Marvi Murphy-11-11-19 13.13.32.jpeg JPEG Image - 93 KB	11/17/2019 11:	L5 PM						
	abi test 2/21/20 Action Item - On T abi test - 2 2/21/2		No Due Dat	- 11	annotation-Marvi Murphy-11-18-19 12.18.01.jpeg	3/4/2020 8:	54 PM					
	Action Item - On T Test 1234		No Due Dat		JPEG Image - 82 KB     annotation-PunchlistItem-Marvi Murphy     10 10 12 17 44 455	-11-						

• Click twice to see only the Activity Centers View:

ASKS	PROJECT HOME - ALPENGROVE ENVIRON	MENTAL SCIENCE CENTER (1999009.00	1)		Refreshed	3 minute(s) ago 🔿 🏠
Project Edit Project Settings	▲ Favorite Activities					
Show Project Item Locks Setup Mobile Apps	Project Files 4,514 files, 15.93 GB	S Info Exchange 2 pending incoming	Project Images 969 files, 404 MB	Markup Sessions 58 items		
Return to My Project Center	Project Email 757 messages	Hansmittals	Document Sets 24 items	Newforma Viewer		
PROJECT OVERVIEW	Project Management					
Alpengrove Environmental Science Center						
Welcome Alison Whitney	Daily Reports 8 items	Action Items 112 open	Document Control 42 record documents	Site Visits 22 items		
COMMON QUESTIONS	A Meeting Minutes	22 Project Team 177 members	Project Timeline 89 items	Co Project Center Administration		
	∡ Contract Management					
	Submittals 55 items	Addendums 3 items	Construction Change Directives 3 items	Ontracts 12 items	Co Project Publisher	
	RFIs 26 items	Supplemental Instructions 24 items	Change Order Proposals     16 items	Sketches and Supplemental Dra 6 items	awings (?) Potential Change Orders	
	Bulletins 4 items	Proposal Request 10 items	Change Orders 10 items	Punch List 132 open		
	▲ Building Information Management					
	Building Models and Elements 0 models, 0 elements	Spatial Index 499 spaces				
	⊿ Utilities					
	Project Keywords 62 keywords in use	Record Copies 443 Items				
	Choose a Recent File					

*Global and Project Administrators can set which Activity Centers are available for each project.* 

#### **Edit Project Home contents**

Users can create a list of favorite activity centers for a project to more easily access frequently used activity centers.

- 1. Click the **Preferences** icon at the top of the screen and select **Project Home Contents**. The **Edit Project Home Contents** dialog appears.
- 2. To add an activity center to the list of favorites, drag and drop it from the **Hidden Activities** list to the **Favorite Activities** pane.

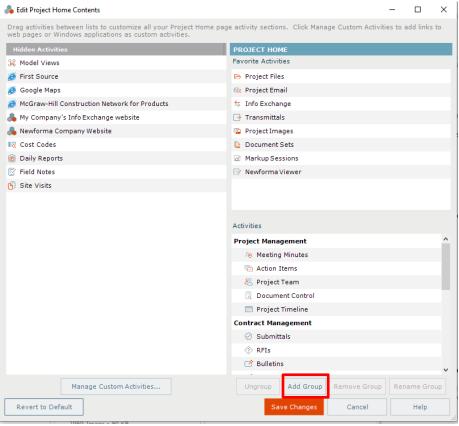
💑 Edit Project Home Contents	>	×
Drag activities between lists to customize all your Project Home pag web pages or Windows applications as custom activities.	e activity sections. Click Manage Custom Activities to add links to	
Hidden Activities	PROJECT HOME	
년, Model Views	Favorite Activities	
🥖 First Source	🖻 Project Files	
🥑 Google Maps	🔂 Project Email	
👩 McGraw-Hill Construction Network for Products	S Info Exchange	
🜲 My Company's Info Exchange website	→ Transmittals	
🜲 Newforma Company Website	💿 Project Images	
IIQ Cost Codes	Document Sets	
🔋 Daily Reports	🙆 Markup Sessions	
😰 Field Notes	📴 Newforma Viewer	
ြှဲ Site Visits		
	Activities	
	Project Management	^
	ීල Meeting Minutes	
	C Action Items	
	😤 Project Team	
	Document Control	
	📰 Project Timeline	
	Contract Management	
	🔗 Submittals	
	RFIs	
	🖄 Bulletins	
Manage Custom Activities	Ungroup Add Group Remove Group Rename Group	
Revert to Default	Save Changes Cancel Help	

3. Click Save Changes to save the updates to the Favorite Activities list.

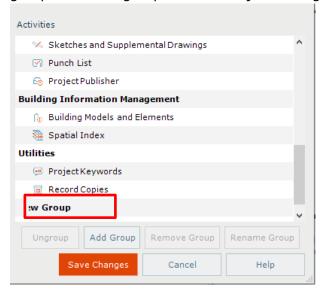
#### Add groups to the Project Home page

Add groups to the **Project Home** page to help organize the available activity centers.

1. Click the **Preferences** button at the top of the screen and select **Project Home Contents**. The **Edit Project Home Contents** dialog appears:



2. Click **Add Group**. A text box appears in the **Activities** pane. Type the name of the new group. Common groups include Project Management, Design and Contract Management.



3. The new group appears in the **Activities** list. Drag and drop an activity center onto the appropriate group to add it to the group.

Activities		Activities					
🖂 Punch List		💿 Project Publisher					
💿 Project Publisher		Building Information I	Management				
Building Information M	lanagement	🏠 Building Models a	nd Elements				
🏠 Building Models ar	nd Elements	🦉 Spatial Index					
🦉 Spatial Index		Utilities					
Utilities		🤕 Project Keywords					
🐖 ProjectKeywords		Record Copies					
a Record Copies		CA					
CA	New Group Added	RFIs	Activity Centers Added				
		💿 Project Images	Auueu				

4. Click **Save Changes**. The new group appears on the **Project Home** page.

PROJECT HOME - ALPENGROVE ENVIRONM	IENTA	L SCIENCE CENTER (1999009.001)		
Favorite Activities				
Project Files 4,473 files, 14.91 GB	⇔	Info Exchange 2 pending incoming	ľ	Document Sets 24 items
Project Email 751 messages	-	Transmittals 435 items	2	Markup Sessions 58 items
Project Management				
A Meeting Minutes	22	Project Team 176 members		Project Timeline 87 items
Action Items 111 open	đ	Document Control 42 record documents	60	Project Publisher
Contract Management				
Building Information Management				
• Utilities				
⊿ CA				
RFIs 26 items		Project Images 967 files, 403.73 MB		
Choose a Recent File				

## **Project Files**

Project Center offers different ways to access project files. Locate information by accessing the files from the Project Files activity center.

1. On the **Project Home page**, select the **Project Files** activity center.

PRO	PROJECT HOME - ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.001)					
	Favorite Activities					
Þ	Project Files 4,473 files, 14.91 GB	Ś	Info Exchange 2 pending incoming		Document Sets 24 items	Newforma Viewer
62	Project Email 751 messages	<b></b>	Transmittals 435 items	ø	Markup Sessions 58 items	

2. The Project Files activity center displays the project information in its directory structure. Use this to access files in the same manner as Windows Explorer.

199909.00       Name A       Related Items       Type       Size       Date Modified       Keywords       Owner       Descr         B - Management       B - Management       B - Management       File Folder       3/23/2015 9105133 AM        NEWFORMAlbackups         C - Communication       C - Communication       File Folder       3/23/2015 9105133 AM        NEWFORMAlbackups         C - Communication       C - Communication       File Folder       3/23/2015 9105133 AM        NEWFORMAlbackups         C - Communication       C - Communication       File Folder       3/2/2019 11:2113 AM        NEWFORMAlbackups         C - Communication       File Folder       Size       3/9/2020 1:31:17 PM        NEWFORMAlbackups         C - Communication       File Folder       File Folder       3/9/2020 1:31:17 PM        NEWFORMAlbackups         C - Communication       G - Product Data       File Folder       1/2/2/2019 1:0:40164 AM        NEWFORMAlbackups         C - L - Contraction Set       File Folder       File Folder       2/2/2/2019 1:0:26:03 AM        NEWFORMAlbackups         C - L - LEED Certification       File Folder       File Folder       1/2/2/2019 1:0:26:03 AM        NEWFORMAlbackups <t< th=""><th>roject Files 🗸</th><th></th><th></th><th></th><th></th><th></th><th></th><th>Filter All Columns</th><th></th></t<>	roject Files 🗸							Filter All Columns	
B - Management       B - Management       File Folder       3/2/2015 11:17:24 AM	3 1999009.00	Name 🔺	Related Items	Туре	Size	Date Modified	Keywords	Owner De:	icr
C - Communication       B - Management       File Folder       3/2/2015 9:05:33 AM        MEWFORMA\backups         C M - Contract Management       C C - Communication       File Folder       8/2/2019 11:24:13 AM        MEWFORMA\backups         E - CAD       C M - Contract Management       E - CAD       B File Folder       8/30/2016 12:56:19 PM        MEWFORMA\backups         G - Froduct Data       E - CAD       D       File Folder       3/9/2020 13:117 PM        MEWFORMA\backups         H - Construction       E - GAD       D       File Folder       2/27/2019 10:40:16 AM        MEWFORMA\backups         H - Construction       G - Product Data       File Folder       2/2/2019 11:31:17 PM        MEWFORMA\backups         L - LEED Certification       G - Product Data       File Folder       2/2/2019 10:40:16 AM        MEWFORMA\backups         P - Photos       G - Product Data       File Folder       2/2/2019 10:40:16 AM        MEWFORMA\backups         P - Photos       G - Product Data       File Folder       2/2/2019 10:40:16 AM        MEWFORMA\backups         Photos       L - LEED Certification       File Folder       12/2/2019 10:20:30:AM        MEWFORMA\backups         Photos<			<b></b>	File Folder		8/8/2018 11:17:28 AM			
CM - Contract Management       I       C - Communication       File Folder       8/2/2019 11:24:13 AM		B - Management		File Folder		3/23/2015 9:05:33 AM		NEWFORMA\backups	
F - CAD       CM - Contract Management       File Folder       8/30/2016 12:56:19 PM        NEWFORMA\backups         F ield Notes       E - CAD       Imagement       File Folder       3/9/2020 1:31:17 PM        NEWFORMA\backups         G - Product Data       Field Notes       Field Notes        NEWFORMA\backups       NEWFORMA\backups         G - Product Data       Field Notes        File Folder       2/2/2019 10:40:16 AM        NEWFORMA\backups         G - Product Data       File Folder       9/26/2018 11:30:48 AM        NEWFORMA\backups         G - Product Data       File Folder       2/26/2018 11:30:48 AM        NEWFORMA\backups         G - Product Data       File Folder       2/26/2018 11:30:48 AM        NEWFORMA\backups         G - Product Data       File Folder       2/26/2018 11:30:48 AM        NEWFORMA\backups         G - Product Data       File Folder       2/26/2018 10:30:40 AM        NEWFORMA\backups         G - Product Data       File Folder       1/29/2016 10:26:03 AM        NEWFORMA\backups         Photos       File Folder       1/29/2020 3:07:10 AM        NEWFORMA\backups         Publisher       Pohotos       File Folder       <		C - Communication		File Folder		8/2/2019 11:24:13 AM		NEWFORMA\backups	
Field Notes       E       C-AD       File Folder       3/9/2020 1:31:17 PM       -       NEWFORMA\backups         G - Product Data       Field Notes       -       File Folder       2/27/2019 10:40:16 AM       -       NEWFORMA\backups         H - Construction       G - Product Data       File Folder       9/26/2018 11:30:48 AM       -       NEWFORMA\backups         L - LEED Certification       G - Product Data       File Folder       9/26/2018 11:30:48 AM       -       NEWFORMA\backups         P - Notos       G - Product Data       File Folder       9/26/2018 11:30:48 AM       -       NEWFORMA\backups         P - Notos       G - Product Data       File Folder       9/26/2018 11:30:48 AM       -       NEWFORMA\backups         P - Notos       G - Product Data       File Folder       12/2018 10:26:30 AM       -       NEWFORMA\backups         P - Photos       L - LEED Certification       File Folder       12/9/2018 10:26:30 AM       -       NEWFORMA\backups         P - Photos       File Folder       File Folder       12/9/2020 3:07:10 AM       -       NEWFORMA\backups         P - UnchList       P- Photos       File Folder       1/29/2020 3:07:10 AM       -       NEWFORMA\backups         P - UnchList       Pile Folder       File Folder       1/29		CM - Contract Management		File Folder		8/30/2016 12:56:19 PM		NEWFORMA\backups	
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I - Coordination Set       H - Construction       File Folder       2/26/2014 11:11:35 AM        NEWFORMA\backups         I - LEED Certification       I - Coordination Set       File Folder       8/15/2019 8:03:34 AM        NEWFORMA\backups         P - Photos       I - LEED Certification       I - EED Certification	H - Construction								
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## Search

#### **Overview**

The Search capability is one of the most powerful Newforma Project Center features. It enables search for text in all folders, files and items (including keywords) in a single project or multiple projects, in project email, in My Projects, and in archived projects. Also search Google Desktop or a SharePoint site, if these are used. By enabling search across multiple record types simultaneously, the Newforma Project center search saves time finding valuable project information.

#### **Perform a search**

- 1. Enter the search text in the **Search** field (located in the Toolbar) and click the search button
- 2. All instances of the text from all files and items in the project are listed in the **Search Results** window.

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	NewformaReport_2007.01.05_10.12.41.xls	Microsoft Ex		<b>1</b>	Content		\R - Reports	33 KB	1/16/2007		

### **Search Tips**

- Newforma Search does not recognize punctuation marks or the following special characters: ! @ # % ^ &. These are ignored, but they will still be found in filenames.
  - For example: to search the phrase errors & omissions the ampersand will be ignored. If it is enclosed in quotes, as follows, it will still be ignored: "errors & omissions".
- Wildcards can be used in the search window.
  - For example, searching for DWG files only, enter \*.DWG in the search window.
- If looking for a phrase, enter the phrase in quotes such as "concrete slab".

#### **Use search filters**

Filter search results by the file type and use the column sorting to help find files.

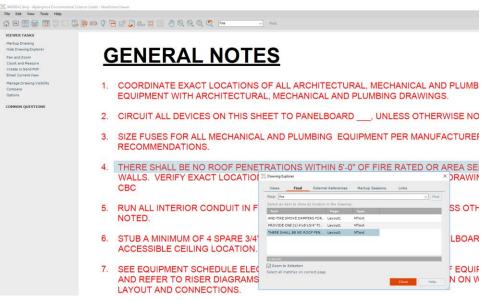
1. To filter by file type, select the desired option from the **Filter by** dropdown list.

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Search the results Create Report	Name All Matches Documents (.doc, .docx, .docm, .wpd)	Items Match Type
Refine results using filters or select a file to preview and view available	Drawings (.dwg, .dgn, .dxf) Newfor Email (.msg, .eml) Images (.bmp, .cal, .emf, .gif, .ico, .jpg, .jpeg, .png, .psd, .tif, .tiff, .wml	Content
tasks. Use Newforma Viewer to view search results within the file or open the file in its native application.	AESCS Presentations (.ppt, .pptx, .pptm)     AESC_     PDF Files (.pdf)	Content
	Published Documents (.dwf, .dwfx, .ifc, .plt, .nwd) AESC_I Spreadsheets (.xls, .xlsx, .xlsm, .xlsb)	Content
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2. Once the file is located, double click on it to open. The Newforma Viewer opens 2D CAD, PDF and image files automatically. The **Find tab** of the **Drawing Explorer** dialog box shows where the search criteria are found in the file.

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	Select all matches on current page	
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3. When you select a line item on the **Find** tab, the view zooms in to where it appears in the file.

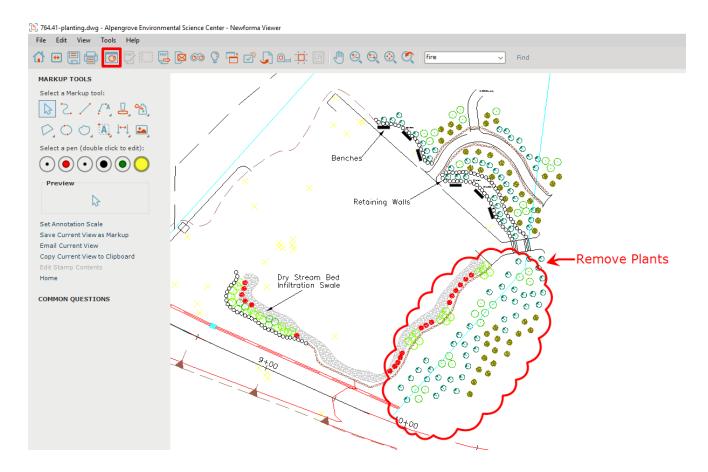


## **Using the Viewer and Markup**

The Newforma Viewer opens 2D CAD files, PDF files and image files.

You can use the icons in the toolbar to zoom into sections of the image and open the Markup tools.

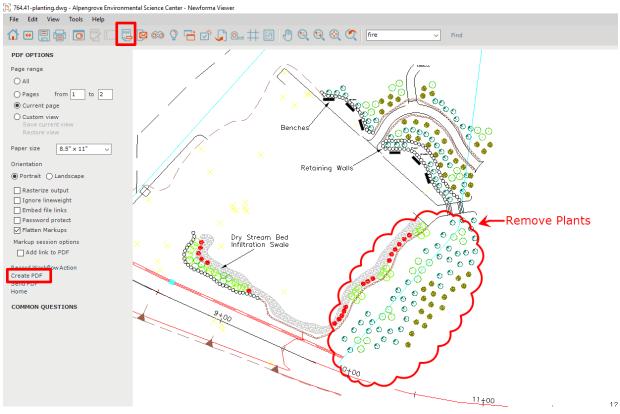
You have a variety of options within the markup tools including pointers, circles, clouds and text.



### Making a PDF

After markups are complete, saving the file as a new PDF embeds the markups for communication purposes.

1. Click the **PDF** icon in the toolbar. The **PDF Options** pane appears.



Select **Create PDF** to name and save the PDF to a desired location.

#### **Save Markup Session**

From the Newforma Viewer, you can save the current markup as a markup session which is referenced with this file as a related project item. All markup sessions are tracked in Newforma Project Center and do not change the native file.

1. To save the markup session, click the **Save** icon in the toolbar.



2. The **Save Markup Session As** dialog appears. Enter a name for the markup and click **OK** to save the markup to the project.

🕒 Save Markup Se	ession As		-	
Name:	Plant Removal			
Members:	Adam Klose (Jeffers	on Mill Associates);		
Status:	Open	~		
Remarks	Email Log (0) R	elated Items (1) Change Log		
BIUS	Verdana	$\sim$ 10 $\sim$ A $\cdot$ f f. $\ddagger$ $\ddagger$ $\parallel$		· =
Remove pla	nts to make way i	or parking lot expansion.		
Keywords:				
<b>↓</b>		ОК	Cancel	Help
Saving the mark	up session does r	ot change the native file.		

3. When this file is opened from Newforma Project Center, the markup is listed on the **Markup Sessions** tab in the **Drawing Explorer** dialog along with any others related to this file. Select the checkbox for each markup you want to view on the file.

Drawing Exp	lorer					
Views	Find	External Re	eferences	Markup Ses	ions	Links
	check box to d make it the ac			elected Markup	Session.	Double click
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Select All	Open Sel	ect All C	lear All			
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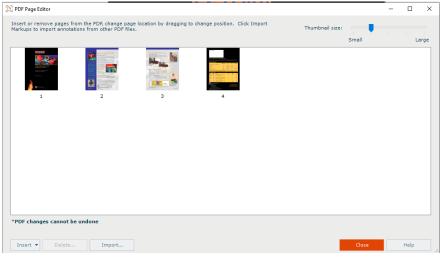
#### **PDF Editor**

When opening a PDF file in the Newforma Viewer use the PDF Editor to delete pages, add pages, reorder pages and import markups. These markups do not have to originate in Newforma. They can be done by outside consultants in applications such as such as Adobe or Bluebeam.

1. After opening a PDF in the Newforma Viewer, click the **PDF Editor** button in the toolbar. The **PDF Page Editor** opens and displays the pages of the selected PDF file.



2. Drag and drop pages to change the order. To remove a page, select it and click **Delete**.



## **Managing Project Email**

#### **Filter for Email Messages**

When you do a general project search, the **Search Results** display all project information including project email and attachments.

1. To filter results to only display email, select **Email (.msg, .eml)** from the **Filter by** dropdown list. The **Search Results** update to only display project email that matches the search criteria.

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file to preview and view available tasks. Use Newforma Viewer to view	Images (.bmp, .cal, .emf, .gif, .ico, .jpg, .jpeg, .png, .psd, .tif, .tiff, .wmf) AESCS Presentations (.ppt, .pptx, .pptm)	С						
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#### **Change Email Preview**

1. To adjust the preview of the email in the **Search Results**, click the **View** icon in the toolbar.

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Refine results using filters or select a file to preview and view available tasks. Use Newforma Viewer to view search results within the file or open the file in its native application.		Preview  Auto Preview procence you me Kelly Coyle	None Right 2018, a Bottom

2. Select **Preview**, then the desired preview position from the menu.

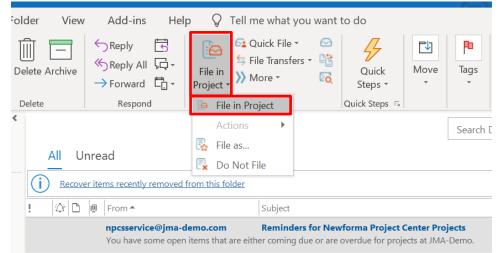
### **File Email Messages to the Project**

- 1. To file an email into a project, open the email client (i.e., Outlook).
- 2. Drag and drop emails into the correct project folder under **Newforma-Items to File** in the email client. By default, the email is removed from the Inbox.

File Hom	e Send / Receiv	re Folder	View	Add-ins	Help	Õ	Tell me what you	want to do	
New New Email Items •	Recover Deleted Items from Server	Relete	Archive	← Reply [ ≪ Reply All → Forward [		File in Project	G Quick File ▼ S File Transfers ▼ More ▼	Quick Steps *	
New	Actions	Delete		Respond			Newforma	Quick Steps 🕞	
✓ Favorites Deleted Items Conversation I Junk Email ✓ Newforma - Ite		5420 [2] []		r items recently re			Subject		
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St. Alexius Medical Center - mv16v Outbox				npcsservice@jma-demo.com Reminders for Newforma Project You have some open items that are either coming due or are overdue for pro					
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#### File Email and Keep a Copy in your Inbox

1. To keep a copy of the email in the Inbox, select the email and select the **File in Project** icon.



2. Select the desired project in the **File in Project dialog box**. Click **File** to file the email.

💑 File in Project	×
File In       Project:     Search Project       Search Projects	Project Location:
2007032.00 - University Foundation Administration Building 1999009.001 - Alpengrove Environmental Science Center 6012788 - 6012788 Concord Tower 00-683 - St. Alexius Medical Center 2003005.00 - Freighthouse Flats <sup>(3)</sup> My Recent Projects Newforma File Sharing	Another project location:
Filing Options	
	o another email folder
Filing Instructions: Email messages will not be moved to another email folder after filing.	Change
Additional Settings	
Select in Project Center after filing Keywords:	
	File Cancel Help

3. A copy of the email is placed in the Newforma project folder and the email remains in your Inbox.

#### **Send and File Emails**

1. To file an email to a project at the same time it is sent, click **Send and File in Project** in the ribbon bar when sending, forwarding, or replying to an email. The select a project dialog appears.

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Send and File in Project • Newforma	Paste	Copy Format Painter	Calibri (Boc + 11 B I U 🖉	<ul> <li>A<sup>^</sup> A<sup>×</sup></li> <li>▲ × =</li> <li>Basic Text</li> </ul>	∃ •  ∃ •  ≡ ≡   <u>=</u>		Address Check Book Names Names	Attach Attach S File - Item - Include	- -	Assign Policy *	Follow Up <del>-</del> High Importance Low Importance ags	
$\triangleright$	То	Adam Klose										
Send	Cc											
	Subject	Site Visit										
Adam,												

The Site Visit is scheduled for Friday.

Thanks, Bob

 Select the project from the recently used list or browse out to select from any project in Newforma.

💑 File in Project	×
File In         Project:       Search Project            • My Projects         2007032.00 - University Foundation Administration Building         1999009.001 - Alpengrove Environmental Science Center         6012788 - 6012788 Concord Tower         00-683 - St. Alexius Medical Center         2003005.00 - Freighthouse Flats         S My Recent Projects         Newforma File Sharing	Project Location:  Project Subfolder:  Confidential  Another project location:
Filing Options         Save copy of attachments separately         Move to         Filing Instructions:         Email messages will not be moved to another email folder after filing.	another email folder Change
Additional Settings Additional Settings Select in Project Center after filing Keywords:	File Cancel Help

#### **Using the Project Email Activity Center**

In the Project Email activity center all the email filed to that project is seen, regardless of who filed the original item.

1. To view only the emails in which you were involved, click the **People** icon. To toggle back to viewing all emails, click the **People** icon again.

ASKS		PROJECT	EMAIL - ALPENGR	OVE ENVIRONM	ENTAL SCIEN	ICE CENTER (1999009.001)	
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Log As		<b>T</b>	Ŧ	Ŧ	7		7
/iew Conversation			Howard Roark	'aklose@jma		Project: Alpengrove Environmen	Wed 1/26/20
Copy to My Mailbox Change Keywords			Associates); Ma	ry Green (Green Serv	ices); Peter Kea	fferson Mill Associates); Bob Welder (Ma ting (Keating Architects); Ron Coal (Tru -24b6-41b2-b683-678128c30 a3e <u>a</u>	
info Exchange Email	1		Howard Roark	'bwelder@ma		Project: Alpengrove Environmen	Wed 1/26/20
imaii	1		2010 Project:	Alpengrove Environm	ental Science Ce	ougall Construction) has changed. This a nter Number: 1999009.00 Assigned To: ne: Construction; Safety;	
Asite Publish			Howard Roark	'bwelder@ma		Project: Alpengrove Environmen	mund a loc los

A single person on the icon means only your email are shown. Multiple people in the icon means that all messages related to the project are shown.

2. To further narrow the results, enter values in one or more column's search filters to help locate the desired email.

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Log As		<b>X X</b>		₹	Ŧ	Ŧ	7		$\overline{\pi}$
View Conversation			Howard Roark	'aklose@jm	a	Project: Alpen	grove Environmen	Wed 1/26/2011 7:	17 AM
Copy to My Mailbox							tes); Bob Welder (MacD		
Change Keywords						r Keating (Keating Archi 31dfd-24b6-41b2-b683-	tects); Ron Coal (Trump 678128c30 a3ea	Skyscrapers) Select tr	te link belov
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### **Responding to Project Email Filed in Newforma Project Center**

1. To respond or forward any project email in the Email activity center, double-click on the message. The message opens in Outlook.

<b>日 り</b> ひ	) 1 1	B * =		RE: Pro	ject: Alpengrove	e Environmental Sci	ence Center -	- Action Item - Re	ecord sound p	ressure levels at si	t Actionlt	em:00091:An	nHax - N
File Mes	sage Ins	ert Options	Format Text	Review Hel	p Q Tel	l me what you wa	nt to do						
Send and File in Action Item •	Paste	{ Cut ∄ Copy ダ Format Painter	Gill Sans M ▼ 10 B I U 4	0.5 ▼ A^ A	• }≡ •   Aø ≡   == ==	Address Address Names		ttach Signature	Assign	Follow Up + High Importance Low Importance	Dictate	View	) Insights
Newforma	Cli	pboard 🕞		Basic Text	Fai	Names	l In	nclude		Tags	Г <sub>и</sub> Voice	Salesforce	
$\triangleright$	То	O <u>Howard Roar</u>	<u>k <hroark@jma.co< u=""></hroark@jma.co<></u>	om>; ○ <u>'bwelder@m</u>	acdougall.com'	;	<u>ım'</u>						
Send	Cc												
	Subject	RE: Project: Alpe	ngrove Environme	ental Science Center	- Action Item - F	Record sound press	ure levels at si	it ActionItem:	:00091:AmHax				
From: Howard Roark <hroark@jma.com> Sent: Wednesday, January 26, 2011 7:17 AM To: 'bwelder@macdougall.com' <bwelder@macdougall.com'; 'aklose@jma.com'="" <aklose@jma.com=""> Subject: Project: Alpengrove Environmental Science Center - Action Item - Record sound pressure levels at sit ActionItem:00091:AmHax The action item that is assigned to Bob Welder (MacDougall Construction) has changed.This action item is awaiting assignment. Due Date on the following action item has been changed from Wednesday, December 22, 2010 to Wednesday, December 22, 2010</bwelder@macdougall.com';></hroark@jma.com>													
2	Project: Alpengrove Environmental Science Center												
Assigned E	3y: Adam	Klose (Jefferso	n Mill Associate	es)									
		pond to email tr		vard an e on.	email s	stored in	n a pr	roject e	even i	f you w	ere r	not pa	art of

2. Once the email is open in Outlook, use the **Send and File in Project** button if the email is related to a project.

### **Copy Project Email Back to Your Inbox**

There may be times such as leaving the office that a copy of an email stored in a project needs to be back in the Outlook Inbox for easy reference in the field. Newforma Project Center provides a way to do so quickly.

1. Highlight the email(s) to be copied back to the Inbox in the Project Email activity center. Select **Copy to My Mailbox** from the **Tasks** pane.

TASKS		PRC	JECT E	MAIL - ALPENGR	OVE ENVIRO	NMENTAL SC	IENCE CENTER (1	999009.001)		
Selected Email Open with Microsoft Outlook		8		t Messages (751)						
Add To			B ()		То	CC	Subject		Sent 🔻	
Log As		$\overline{\pi}$	7	<b>T</b>		Ŧ	<b>T</b>	Ŧ		
View Conversation			$\boxtimes$	Howard Roark	'aklose@jma.		Project: Alpen	grove Environmen	Wed 1/26/2011 7	:17 AM
Copy to My Mailbox Change Keywords				Associates); Ma	ry Green (Green	Services); Peter		tes); Bob Welder (MacD tects); Ron Coal (Trump 678128c30 a3e <u>a</u>		
Info Exchange Email Asite Publish	) 			2010 Project: /	Alpengrove Enviro	o Bob Welder (Monmental Science	lacDougall Construction	grove Environmen n) has changed.This act 9009.00 Assigned To: Bo Safety;	ion item is awaiting ass	signment
Explorer Tasks Create Report	+		$\boxtimes$	Howard Roark The action item	'bwelder@ma that is assigned t		3 1	grove Environmen n), Mary Green (Green S		

2. The email is copied to the Outlook Inbox and appears in the **Newforma-Copied Messages** folder.

> Inbox	108
Drafts	[2]
Sent Items	
Deleted Items	5419
Archive	
Conversation History	
Junk Email	[2]
Newforma - Copied Messages	
> Newforma - Items to File	
Outbox	
RSS Subscriptions	
Spambox	13
✓ Search Folders	
Missed Calls	
Missed Conversations	
Voice Mail	
Voice Main	

## **Using Newforma Info Exchange**

#### **Overview**

Newforma Info Exchange is a project website that facilitates the transfer of files without the limitations of email or FTP. It also allows both internal and external project members (with permission) to access select project data from the website with any web-enabled device. The Info Exchange activity center is used to create and manage all file transfers sent via Info Exchange; however, Info Exchange transfers can be created directly from many of the other Activity Centers such as Project Files and Project Email.

### Managing Info Exchange Access with the Project Team

In order for an external contact to both receive and send transmissions via Info Exchange, he/she must be a member of the project team and have Info Exchange access. These permissions are given in the Project Team activity center and are set per project.

1. To give a user access, select the desired contact in the Project Team activity center and click **Modify** in the **Tasks** pane.

TASKS	PRO	JECT	TEAM - ALPENGRO	VE ENVIRONMENTAL SCIE	NCE	CENTER (1999009	9.001)	
Project Team Notice Modify	All	(117)	~					
Send Email	Ľ	æ	Name	Email Address		Disciplines	Company	
Generate Form Letter	17	- 7	7		$\overline{\tau}$	7		$\overline{\pi}$
Send Files	 8		Design Review					
Request File Transfer	Ĩ		Bob Welder	bwelder@macdougall.com			MacDougall Construct	t

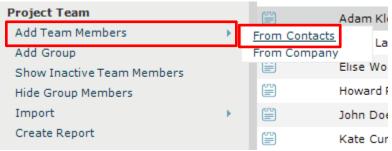
2. The Modify Project Team Member dialog appears. Select the Project Roles and Permissions tab. Select the Allow web access to this Project on your Info Exchange server checkbox in the Newforma Info Exchange Options section of the dialog. This is a per project setting. If it is the first time access has been given to this user on any project, Newforma sends the user an email with login credentials and directions.

Project Roles and Permiss       Project Assignments       Change Log         specified		
Active O Inactive		
Active O Inactive		
5		
5		
on your Info Exchange server		
Visible to all external project team members (show name, company v		
External User Vie	w	
:	External User	

### **Adding Team Members to a Project**

If the contact is currently not in the project team you will need to add them to the project.

1. Select **Add Team Members > From Contacts** from the **Tasks** pane.



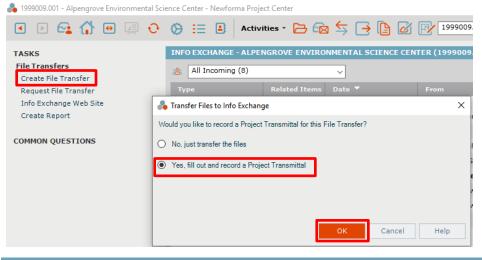
2. The **Choose New Team Members from Global Contact List** dialog box appears. Select the checkbox for each of the contacts you wish to add as project team members and click **OK**.

å Choose New Team Membe	ers from Global Contact List			×
Internal Contacts	Search Contacts		✓ Q ▼ 1	× ø
🔲 🗎 Name 📥	Email Address	Disciplines	Company	wo ^
	7	Ŧ		
			Newforma	
			Newforma	603-
			Newforma	603-
			Newforma	+44
			Newforma	
			Newforma	
✓ III			Newforma	
			Newforma	603-
<				>
144 Contacts Add New		ок	Cancel	Help

If the contact is not already in the list, you can click **Add New** to add the contact or drag and drop the contact from your Outlook Contact list.

#### **Transfer Files and Create an Outgoing Transmittal**

1. To initiate a file transfer in the **Info Exchange** activity center, select **Create File Transfer** from the **Tasks** pane. In the **Transfer Files to Info Exchange** dialog, select the **Yes, fill out and record a Project Transmittal** option and click **OK**.



*This process can be initiated from other Activity Centers by highlighting the files or folders to transfer and selecting* **Info Exchange** *in the* **Tasks** *pane.* 

2. The **Transfer Files and Create an Outgoing Transmittal** form appears. Fill in the transmittal information as needed. The following table provides information on the function of each field in the form. Use the **Associated Files** tab to add files or folders of documents that you want to send.

🜲 Transfer File	les and Create an Outgoing Transmittal —		×				
To:	Bob Welder (MacDougall Construction);						
CC:							
From:	Adam Klose (Jefferson Mill Associates)						
Subject:	File Transfer						
Purpose:	For Your Use						
Date:	Wednesday, March 25, 2020						
Send Via:	Info Exchange v						
	Log In Document Control 🚯						
Remarks	Description of Contents (1) Associated Files (1)* Email Log (0) Related Items (0) Change Log						
Files to Trans	isfer Views ▼ Add Files Add Folder Include Files From ▼ R	lemove					
Name	Name         Type         Size         Date Modified         Path         Keywords						
Change	DeangeOrderSummary.xlsx MicrosoftExcel Wor 17 KB 12/8/2011 8:48:52 AM \\ne\1999009.00						
External Refe	ferences: Include all externally referenced drawing, image, and support files	~					
Save record	rd copy in: \\newforma.local\data\public\NPCS\1999009.00\c - communication\transfers\outgoing\	~					
*Required	Review complete list of files before creating transmittal						
Keywords:							
<b>↓</b>	Print or save form after filing Save Draft Create and Transfer Cancel Cancel	Help					

То	Click to open the <b>Choose a Project Team Member</b> dialog box and select the project team members to send the files to. Email addresses can be typed directly in this field.
	If email addresses of contacts are not project team members, they will not have the ability to partially download files on Info Exchange.
СС	Click to open the <b>Choose a Project Team Member</b> dialog box to select additional recipients. Email addresses can be typed directly in this field.
	Contacts in the <b>CC</b> field receive a link to download the files but will not be sent reminders.
From	Click to open the <b>Choose a Project Team Member</b> dialog box to select the project team member who is transferring the files. The current user is the default. Email addresses can be typed directly in this field.
Subject	Enter a subject for the file transfer.
Purpose	Select the purpose of the file transfer from the dropdown list.
Date	The date the files were transferred. The current date is entered by default, but the date can be edited if needed.
Transmittal ID	Project Center automatically creates an ID number for the transmittal. Edit the ID number if needed.
Send Via	The files are transferred via Info Exchange by default, but other options are available.
Keywords	Click to open the <b>Choose Keywords</b> dialog box to select keywords. In Project Center, keywords are words you can add to items to use for filtering. When you add keywords, they appear in the <b>Keywords</b> column of the corresponding Project Center activity center. You can then filter the list of items using the keywords to quickly find the items you are looking for.
A	Click to spell check the fields in this window. If any mistakes are found, the <b>Spelling</b> dialog box opens with spelling suggestions.
Print or Email Form After Filing	Mark this checkbox to open the Transmittal form for review and to print immediately after filing the transmittal, or send a report in an email message in Microsoft Outlook to the contacts in the <b>To</b> field.
	The files in the Transmittal form are grouped first by folder, and then listed alphabetically.
Save Draft	Click to save a draft of the transmittal. It will appear in the Draft log of the <b>Project</b> <b>Transmittals</b> activity center. The files will not be sent.
Create and Transfer /	The button that appears is based on the transfer method selected in the <b>Send Via</b> field. When Info Exchange is selected, <b>Create and Transfer</b> appears.
Create and Send / Create Transmittal	Click to open the <b>Transfer to Info Exchange Options</b> dialog box to edit the settings for the file transfer and transfer it to your Newforma Info Exchange Server.

3. When you are done filling in the transmittal information, click **Create and Transfer**. The **Transfer to Info Exchange Options** dialog box appears. Update the options as needed and click **OK** to create the transfer. The following table provides information on the function of each field in the form.

💑 Transfer to Info Exchange Options				
File Tr	ansfer Options			
<mark>8</mark> 8	Specify who has access to the file transfer on your Info Exchange website:			
	Only the specified recipients			
	O Specified recipients and their fellow company members			
	○ All Project Team members			
	O Public access			
	Allow recipients to download partial contents			
	Remove content from Info Exchange after 30 days.			
Notific	ation Options			
=	Hide recipient list (1)			
₩.	Require Info Exchange login to download (useful for sensitive information)			
<b>A</b> .	Send notifications and reminders			
	OK Cancel Help			

When you click **OK**, the file transfer is logged in the All Outgoing log of the **Info Exchange** activity center, and the transmittal is filed in the All Sent log of the **Project Transmittals** activity center.

Specify who has access to the	Choose <b>Only the specified recipients</b> to allow only the members selected in the <b>To</b> or <b>CC</b> fields to download the files included in the transfer.			
file transfer on the Info Exchange website	Choose <b>Specified recipients and their fellow company members</b> to allow access only to the recipients and members of their companies (as listed in the <b>Company</b> column of the <b>Project Team</b> window).			
	Choose <b>All Project Team members</b> to allow all recipients and anyone on the internal or external project team to download the files.			
	Choose <b>Public access</b> to allow anyone on the internet to access the file transfer by logging on to the Info Exchange website using the anonymous password.			
Allow recipients to download partial contents	Allows the recipients to download the files incrementally instead of all at once.			

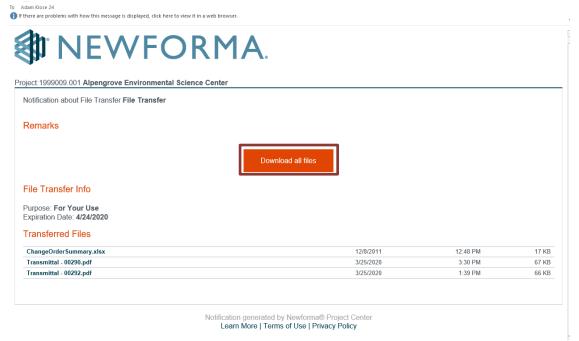
Remove content from Info Exchange	Deletes the uploaded files off the web site after the designated number of days. The log of the transmission and the record copies of the sent files remain. Recipients cannot download files after the expiration date. You can use the <b>Repost</b> option in the <b>Tasks</b> pane in the <b>Info Exchange</b> activity center to allow access to the information again.
Hide recipient list	Hides the list of recipients, which allows you to send bid documents to multiple bidders without the bidders being able to identify the other recipients. If this option is not checked, then the email notifications and transmittals include the <b>To</b> and <b>CC</b> contacts.
Require Info Exchange login to download	Requires the recipient to login to Info Exchange to download the files. The recipient does not receive a direct download link in the email message. If this is unchecked, then the recipient receives a link in the notification email and can download the files without logging into the website.
Send notifications and reminders	Select if you want to send notifications and reminders pertaining to this transfer.

4. Pop up messages appear when the Info Exchange server has started and completed the transmission.

#### **Access and Download File Transfers**

Once a file transfer is completed, recipients can access and download the files.

1. External team members receive a notification email when a file transfer is available. If they are not required to login, they can click the link to download the files and follow the browser download options.



 The second link requires that the user be a team member with access to Info Exchange. Selecting this option enables the recipient to create file transfers for the sender and other team members. Clicking the link opens the Sign in to Newforma Info Exchange dialog box. Enter your username and password and click Sign In.

Sign in to Newforma Info Exc	change
Username	
Password	
Forgot password?	Newforma ID
SIGN IN	
Remember usernar	ne

See the **Managing Info Exchange Access with the Project Team** and **Adding Team Members to a Project** sections above for additional information on team member permissions.

 After logging in, Info Exchange opens automatically to the new file transfer. Select Download All Contents to download all files or select which files to download (if available) and click Download Selected Contents. Select to Open or Save the files at the bottom of the screen.

	MA. 1999009.001 - Alpengr	ove Environmental Science (	_	My Profile   Sign Out
MY PROJECTS DIRECTORY - PROJECT HOME SEND - N	/IEW ▼ HELP ▼			0
Transfer Subject: test Date Seni		Ser	nd Similar Send Email	🗟 View Form
To: CC:	n Date : None			
REMARKS FILES CHANGE LOG DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED CONTENTS	Configure Cloud Delivery			
Name î	Туре	Size	Date Modified	
🔲 🖻 test 🛛 TASKS 🔻				
□ DALA Alpengrove - A201.pdf ④	Portable Document Format	1,455 KB	6/1/2011 12:00:00 PM	
Alpengrove - A202.pdf	Portable Document Format	916 KB	8/1/2011 12:00:00 PM	
Alpengrove - A203.pdf	Portable Document Format	662 KB	7/15/2011 12:00:00 PM	
Alpengrove - A204.pdf	Portable Document Format	761 KB	8/1/2011 12:00:00 PM	
Alpenarove - A205.pdf	Portable Document Format	660 KB	7/15/2011 12:00:00 PM	
Image: Second system         What do you want to do with test.zip (4.6 MB           Image: Second system         From: infoexchange.newforma.com	)? Open	Save ^	Cancel X	

### 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.

1. Log into the Info Exchange web site and select the project.

English NEWFORMA. 1999009.001 - Alpengrove Environmental Scienc.							
MY PROJECTS	DIRECTORY - PRO	Dject home send 🗸 view 🗸 He	ELP 🔻			0	
MY PROJECTS	ALL PROJECTS						
My Projects List	:			x Export	<b>→</b> ()	$\otimes$	
Drag a column hea	der here to group by that colu	m					
Open Items	Number	Name and Description	Status	Т	Options		
T							
n/a *	6012788	6012788 Concord Tower *	Active				
0	1999009.001	Alpengrove Environmental Science Center State-of-the-art Environmental Sciences	Active		Send View 🔻		
n/a *	2003005.00	Freighthouse Flats * Multi-family residence	Active				
n/a *	00-683	St. Alexius Medical Center *	Active				

2. Select **Send, Files** from the Shortcuts.

MY PROJECTS	DIRECTORY -	PROJECT HOME
Shortcuts		
Send		
Files		

3. Fill in the transmittal information including recipients from the project team.

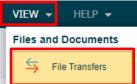
MY PROJECTS DIRECTORY - PROJECT HOME SEND - VIEW - HELP -									
d a File Tra	nsfer								
oject:	Files Requ	ested							
:							-		
:		т	Name 1	Company	Email Address	Discipline	Role		
narks:									
		600	Airry Poster	нежонна	aroster@newrorma.com			•	
		Ħ	Bireshwar Mallick (Gmail)	Pinnacle Cad.	bsmallick@gmail.com			ł	
ninders: s:	$\checkmark$	E	Bob Welder	MacDougall Construction	bwelder@macdougall.com				
		Ħ	Brenton Wild	SmartSoftware	bwild@smartsoftware.net				

4. Select **Add Files** to add files or folders of files to send. Click **Send Files** to complete transfer.

	NEWFORMA. 1999009.001 - Alpengrove Environmental Science Center
MY PROJECT	S DIRECTORY    PROJECT HOME SEND    VIEW    HELP
Send a File Tra	ansfer
Subject:	Files Requested
To:	Bob Welder (MacDougall Construction)
CC:	Select contacts
Remarks:	B I U 5 Tahoma ▼ 2 (10pt) ▼ A ∨ IE IE E E E E E E E E E E E E E E E E
Reminders:	If a recipient has not downloaded the transfer, send notification to me, crecipients on (date)
Files:	ADD FILES REMOVE ALL FILES
	Drag-and-drop files here
	Construction Process.pptx
	SEND FILES CANCEL

#### **Track your File Transfers**

1. To track your file transfers, select **View, File Transfers** from the toolbar or from **Shortcuts**.



2. On the **File Transfers** screen, select the transfer you want to track.

		'FO	RMA. 1999009.001 - AI	pengrove Environmental Science Center	
MY PRO		CT HOME SEND	▼ VIEW ▼ HELP ▼		
	Subject	Related Items	Recipients	Date Sent	Expiration
				<b>• •</b>	<b>T</b>
⇆	Files Requested		Bob Welder (MacDougall Construction)	4/1/2020 1:42:05 PM	

3. Select the **Change Log** tab on the **Transfer** screen to see all actions relating to the transfer.

	NEWFC	)RM	1999009.001 - Alpengrove Environmental Science Center	
MY PROJECTS	5 DIRECTORY - PROJECT HOME 5	SEND 🗸 VIEW	V ✔ HELP ✔	
Transfer Subject: From : To: REMARKS	Files Requested Sarah McKinney (Newforma) Bob Welder (MacDougall Construction) FILES CHANGE LOG	Date Sent : Expiration Date CC:	4/1/2020 1:42:05 PM ate : None 	
Action		т	Date 1	
Uploaded			4/1/2020 1:42:04 PM	

# **Receiving an Info Exchange Transfer from an External Project Team Member**

It is possible for external team members with the proper permissions to send Info Exchange file transfers. As a recipient view the information directly in Newforma Project Center.

1. Transfer recipients receive an email notification. Click the link in the email to view the transfer in the **Info Exchange** activity center.

#### NEWFORMA. Project:1999009.001 Alpengrove Environmental Science Center Notification about File Transfer Re: File Transfer Notification Remarks Remarks from This is a Test File Transfer Request Edited by 1 1 00 1/20/2020 at 4:25 PM e Transmittal in Newforma Project Cer File Transfer Info Purpose: For Your Use Expiration Date: None Transferred Files eMail Notifications operation FlowV3.pptx 23 KB 21 KB 86 KB NPC-12200 - Spike summaryv4.docx 6:57 PM Spike Report NPC-12200 Notification Template Generator Research.docx 6:57 PM Transmittal - 00291.pdf 1:35 PM

 Once in the Info Exchange activity center, you can select Acknowledge Receipt from the Tasks list to acknowledge the receipt of the transfer. The example below shows that the transfer was already received. Depending on the system setting the file may need to be received first.

	1999009.001	<ul> <li>Alpengrove Environmental Sc</li> </ul>	cience Center - Newforma	Project Center
--	-------------	---	--------------------------	----------------

Image:	0	🔅 🗄 🔳 Activ	ities • 🔁 🔂	≥ 🗲 🗗 🖉 (
TASKS		INFO EXCHANGE - ALPE	NGROVE ENVIRC	DNMENTAL SCIENCE CENT
Selected File Transfer Receive pending File Transfer		8 All Incoming (8)		~
View Form		Туре	Related Items	Date 🔻
Send Related Email	۶.		Ŧ	$\overline{\mathbf{x}}$
Modify Info Exchange Settings	۶.	Received Transfer	■ 📑	1/20/2020 2:57:29 PM
Delete		Pending Shared Fold		8/13/20197:24:18
File Transfers		Received RFI (Contents)	T 🕞 📀	4/15/2019 2:22:29 PM
Create File Transfer		Received Submittal Rev		2/13/2019 7:23:37 AM
Request File Transfer				
Info Exchange Web Site		Pending Incoming T		8/9/201811:20:06
Create Report		Received Transfer		8/18/2017 2:38:04 PM
		Received Submittal (Co	🖻 📑 🔗	8/18/2017 2:24:46 PM
COMMON QUESTIONS		Received RFI (Contents)	1	1/18/2017 8:36:46 AM

3. Select the appropriate Next Action from the dropdown list.

嚞 Receive Per	nding Transfer	_		×
An incoming I Project folder	File Transfer has arrived on your Newforma Info Exchange Server and needs to	be trans	ferred to	a
A record copy	(zip file format) will be saved in the following Project folder:			
\\newforma.l	ocal\data\public\NPCS\1999009.00\c - communication\transfers\incoming\		~	
	ons for this 18 KB transfer: (1)			
Transfe	r in the background and notify me when it completes (best for large transfers)			
	r right now using this Project Center client (best for small transfers)			
Next action:	Just transfer the file content			~
	Just transfer the file content Extract transferred files to a Project Folder			
	Record this transfer as a			

#### Next action options:

Just transfer the file content	This option updates the Change Log showing receipt of the file.
Extract transferred files to a Project folder	This option extracts the received files out of the zip file and prompts for the destination folder.
Record this transfer as a	This option allows you to log the transfer as another project item.

## **Resend a File Transfer**

If the transmission needs to be sent again, you can use the **Resend** option.

- 1. To resend a transfer, select it in the list of transfers in the **Info Exchange** activity center.
- 2. Select **Resend** in the **Tasks** list and select **via Info Exchange** or **via Email** from the popup menu.

💑 1999009.001 - Alpengrove Environmental Science Center - Newforma Project Center

◀ 🕨 😪 🚮 😁 🛒	Ð	🔅 🗄 🖪 Activ	ities 🔹 🔁 🔂	₃ 与 🗗 🖉	1999009.001 - Alpe	engrove Environm
TASKS	TER (1999009.001)					
Selected File Transfer		All Outgoing (71)		~		
View Form						
Resend	•	Туре	Related Items	Date 🔻	From	Subject
Compare Contents To	•		<del>-</del>			
Transferred Files	•	Outgoing Transfer with		3/25/2020 11:39:48 AM	Adam Klose (Jefferson	File Transfer
Send Related Email	•	Outgoing Transfer with		3/25/2020 11:35:37 AM	Adam Klose (Jefferson	Re: File Transfer
Modify Info Exchange Settings	•	Outgoing Transfer with		3/25/2020 11:29:45 AM	Adam Klose (Jefferson	File Transfer
Remove from Info Exchange		outgoing manarer with		5/25/2020 11.25.45 AM	Additi Kiose (serierson	The transfer

#### Send Related Email

From Info Exchange, you can send an email that relates to the transfer package to project participants.

- 1. Select the transfer from the list of transfers.
- 2. Select **Send Related Email** from the **Tasks** list. Select **To Sender**, **To Recipients** or **To All Participants** from the fly out menu.

💑 1999009.001 - Alpengrove Environmental Science Center - Newforma Project Center

<ul> <li>E 😪 🏠 😁 🛒 🛟</li> </ul>	🔅 🗄 🖪 Activities * 🗁 📾 🖕 🕞 💽 🕻
TASKS	INFO EXCHANGE - ALPENGROVE ENVIRONMENTAL SCIENCE CENTE
Selected File Transfer	8 All Outgoing (78)
View Form Resend	Type Related Items Date ▼
Compare Contents To	
Transferred Files	Sent RFI (Contents) 🛛 🕫 🔿 6/19/2018 6:15:14 PM 🖡
Send Related Email	To Sender
Modify Info Exchange Settings   Remove from Info Exchange	To Recipients To All Participants

# **Modify Info Exchange Settings**

You can modify Info Exchange settings on a transmission and resend.

- 1. To modify settings, select the transmission in the Info Exchange activity center list.
- 2. Select **Modify Info Exchange Settings** from the **Tasks** list, then select the desired action from the popup menu and update as needed.
  - 💑 1999009.001 Alpengrove Environmental Science Center Newforma Project Center

. ■ 🖻 😭 💮 🛒 🤇	9	♦ 🗄 🖹 Activit	ies 🔹 🔁	6	₃ 与 📑 🕒 🖉	(
TASKS		INFO EXCHANGE - ALPEN	GROVE EN	/IRC	NMENTAL SCIENCE CEN	NT
Selected File Transfer View Form		All Outgoing (71)			~	
Resend	۶.	Туре	Related Ite	ems	Date 🔻	
Compare Contents To	×.			$\overline{\mathbf{x}}$	-	F
Transferred Files	۶.	Outgoing Transfer with	e 📑		3/25/2020 11:39:48 AM	
Send Related Email	×	Outgoing Transfer with			3/25/2020 11:35:37 AM	,
Modify Info Exchange Settings	۶.	Add or Remove Recipients			3/25/2020 11:29:45 AM	,
Remove from Info Exchange Delete		Change Access Level Expiration and Reminder Set	tings		3/12/2020 12:15:37 PM	I

# **Repost Expired Content**

In order to prevent outdated information from remaining on Info Exchange web site, all transmissions should be given an expiration date. There may be situations in which the recipients did not have an opportunity to download the files by the expiration date. If this occurs, the creator of the transmission can repost it.

- 1. Select the expired transmission in the Info Exchange activity center.
- 2. Select Repost Expired Content from the Tasks list.

♣ 1999009.001 - Alpengrove Environmental Science Center - Newforma Project Center

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TASKS		INFO EXCHANGE - ALPE	NGROVE ENVIRO	DNMENTAL SCIENCE CEN	ITER (1999009.001)
Selected File Transfer (Expired)		All Expired (238)		~	
View Form					
Repost Expired Content		Туре	Related Items	Date 🔻	From
Resend	•				
Compare Contents To	•	Outgoing Transfer with		3/17/2010 2:35:58 PM	Howard Roark <hroark< td=""></hroark<>
Transferred Files	•	Received RFI (Contents)	■ 🚽 🕐	3/15/2010 10:05:49 PM	Bob Welder < bwelder@
Send Related Email	•	a come a	-		

## **Tracking Transferred Files**

The **Info Exchange** activity center tracks who transferred files and who downloaded (or partially downloaded) the files with a date and time stamp.

- 1. To view the activity for a transfer, select the transfer in the Info Exchange activity center.
- Select the Transferred Files tab to view the record copy of the files that were transferred. These files can be viewed or saved to a new location if desired.
   I99009.001 - Alpengrove Environmental Science Center - Newforma Project Center

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TASKS         Selected File Transfer         View Form         Resend       >         Compare Contents To       >         Transferred Files       >         Send Related Email       >         Modify Info Exchange Settings       >         Remove from Info Exchange       Delete         File Transfers       Create File Transfer         Create File Transfer       Create File Transfer	INFO EXCHANGE - ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.001)
Request File Transfer Info Exchange Web Site Create Report COMMON QUESTIONS	Files from Record Copy         Name       Type       Size       Date Modified       Path         Image: ChangeOrderSummary.xlsx       Microsoft Excel Wor       17 KB       12/8/2011 10:48:52 AM       Path         Image: Transmittal - 00290.pdf       PDF File       67 KB       3/25/2020 1:30:00 PM       PDF File         Image: Transmittal - 00292.pdf       PDF File       66 KB       3/25/2020 11:39:58 AM       PDF File

# Viewing the Change Log

The **Change Log** tab displays which files each recipient downloaded.

- 1. To view the change log for a transfer, select the transfer in the **Info Exchange** activity center.
- 2. Select the **Change Log** tab. If the **Event Type** column lists **Partial Download**, simply click on that event to see exactly which files were downloaded.

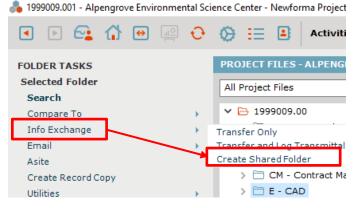
• • • • • •	-	w w		ties • 🔁 🛱							
TASKS		INFO EXCHANGE	ALPEN	GROVE ENVIR	ONMENTAL	SCIENCE CEN	TER (199900	9.001)			
Selected File Transfer View Form		8 All Transfers	(326)		~						
Resend		Type		Related Items	Date 🔻		From		Subject		Te
Compare Contents To			7	Ŧ	1	Ŧ		7	1	Ŧ	
Transferred Files		Outgoing Transfer	with		4/1/2020	11:17:18 AM	Lorenzo Gigli	otti (Newf	test116		
Send Related Email		Outgoing Transfer with		20	3/25/2020 11:39:48 AM		Adam Klose (Jefferson		File Transfer		aklose24@jm
Modify Info Exchange Settings Remove from Info Exchange Delete		Outgoing Transfer <		<b>R</b> G	3/25/202	) 11:35:37 AM	Adam Klose (	)efferson	Re: File Tran:	sfer Notific	
File Transfers	1.5	226 Transfers in 'All 1	(zansfern)								
Create File Transfer		Change Log	Remar	ks Summary	Transferre	d Files Rela	ited Items (3)				
Request File Transfer		Date 🔺	60 H								
Info Exchange Web Site				Ŧ	Ŧ		Ŧ				
Create Report		3/25/2020 11:39:4	48 AM	Created							
		3/25/2020 11:39:	59 AM	Backgroun	d upload						
COMMON QUESTIONS		3/25/2020 11:40:	19 AM	Backgroun	d upload						

#### **Creating Shared Folders**

Creating shared folders synchronizes the content with Info Exchange both manually and automatically. This allows users to access the most up to date information on Info Exchange simply by selecting the files saved in an Info Exchange shared folder. Internal and external users can also upload files to these folders from the Info Exchange web site.

For example, to update a set of Design Documents that go out to the client every Tuesday, create a shared folder that is set to automatically synchronize every Tuesday at the same time and save the new version of the documents in the folder. Notifications to recipients to remind them of the updates can also be sent.

 To create a shared Info Exchange folder, go to the **Project Files** activity center and select the folder to be shared. Select **Info Exchange** from the **Tasks** pane, then **Create Shared Folder** from the popup menu.



2. The **Create Shared Folder** dialog appears. Enter those who should have access to the information in the folder in the **To** and **CC** fields. Enter a name for the folder.

💑 Create Shared Folder	-		×
To:           Adam Klose (Jefferson Mill Associates); Bob Welder (MacDougall Construction);			<u>`</u>
CC: Name: E - CAD			
Remarks       Publish Options       Upload Options       Synchronization Schedule         B       I       U       S       Verdana $\checkmark$ I $f$			
$\mathbf{B}  I  \underline{\mathbf{U}}  \boldsymbol{\$}  \underline{\mathbf{Verdana}}  \mathbf{\vee}  \underline{10}  \mathbf{\vee}  \underline{\mathbf{A}}  \mathbf{\hat{f}}  \hat{f$			
♦ Next action: Synchronize Contents ∨ OK Car	cel	Help	

3. Select the **Publish Options** tab and choose the appropriate setting from the **Files to Publish** dropdown. Set whether or not to include external references with the synchronized files in the **External References** field. To save record copies of all synchronized files, select the **Save a record copy of the published files** checkbox and enter a location for the record copies in the **Record copy folder** field. To notify recipients when the contents of the folder are updated, select the **Notify each recipient** checkbox.

💑 Create Shared Folder	-		×
Recipients and Folder Name			
To: Adam Klose (Jefferson Mill Associates); Bob Welder (MacDougall Construction);			0
CC:			
Name: E - CAD			
Remarks         Publish Options         Upload Options         Synchronization Schedule			
Files to Publish: All files in the selected Folder			
External References: Do not include external references			
Record copy folder: \\newforma.local\data\public\NPCS\1999009. \vee			
Manual Publish Options			
Notify each recipient			
♦ Next action: Synchronize Contents	ncel	Help	

4. Select the Upload Options tab. The options on this tab allow you to control whether or not users can upload files to the shared Info Exchange folder. To allow users to upload files to the folder, select the Allow Info Exchange Users to upload files checkbox. This activates the rest of the fields on the tab.

[	Adam Klose (Jefferson	Mill Associates); Bob We	lder (MacDougall Construction);	$\hat{\mathbf{Q}}$
CC:				
Name:	E - CAD			
Remarks	Publish Options	Upload Options	Synchronization Schedule	
Allow Info	Exchange users to uplo	ad files		
	Exchange users to uplo	ad files by other companies imm	diately	
Allow ac	ccess to files uploaded b	by other companies imm	:diately : with published Shared Folder	
Allow ac	ccess to files uploaded b v access to uploaded file	by other companies imm	with published Shared Folder	
Allow ac Allov Allov	ccess to files uploaded b v access to uploaded file matically synchronize u	by other companies imm es but do not synchroniz ploaded files into publish	with published Shared Folder	
Allow ac Allov Allov	ccess to files uploaded b v access to uploaded file matically synchronize u	by other companies imm es but do not synchroniz ploaded files into publish	with published Shared Folder ed Shared Folder*	
Allow ac Allov Allov	ccess to files uploaded b v access to uploaded file matically synchronize u	by other companies imm es but do not synchroniz ploaded files into publish	with published Shared Folder ed Shared Folder*	
Allow ac Allov Allov	ccess to files uploaded b v access to uploaded file matically synchronize u	by other companies imm es but do not synchroniz ploaded files into publish	with published Shared Folder ed Shared Folder*	

- 5. To make files uploaded by external users immediately available on Info Exchange, select the Allow access to files uploaded by other companies immediately checkbox. Select the Automatically synchronize uploaded files into published Shared Folder option for the uploaded files to appear in Info Exchange as well as in the shared folder (which is a shared folder on your network). To prevent the files from synchronize with the shared folder, select the Allow access to uploaded files but do not synchronize with published Shared Folder option.
- 6. Select the **Automatically synchronize files uploaded via Info Exchange into the associated project folder** option for new files uploaded to the shared folder via Info Exchange to automatically synchronize with the associated project folder.

- 7. Select the **Synchronization Schedule** tab to set the synchronization schedule options for the shared folder. Create either a one-time or recurring synchronization.
- 8. Select the dropdown next to the **New Time** button to select the time range.

Create Share	2d Folder	= L X
Recipients a	and Folder Name	
To:	Adam Klose (Jefferson Mill Associates); Bob Welder (MacDougall Constru-	ction);
		~
CC:		
Name:	E - CAD	
Remarks	Publish Options Upload Options Synchronization Sche	edule
Synchronize	at the following times:	New Time   Modify Remove
Time 🔺	Recurrence Send Notification Save Rec	Four Times a Day
	There are no items to show in f	Twice a Day
		Daily
	pdates require file system credentials in order to apply file system permissio	ns when synchronizing files and folders. Enter your V
login informa	ition.	
Username:	Update credentials for all my scheduled	i syncs (
Password:		
L		
<b>&amp;</b>	Vext action: Synchronize Contents	✓ OK Cancel Help

9. The **Synchronize at the following times:** section of the dialog updates. To modify any time item, select the desired time and click **Modify**. Select the options for record copies and notification as desired and click **OK** to schedule the synchronization.

🜲 Create Shared Folder						-		$\times$
Recipients and Folder N	lame							
To: Adam Klos	se (Jefferson Mill Associates);	Bob Welder (MacDou	gall Construe	tion);				0
CC:								
Name: E - CAD								
Remarks Publis	h Options Upload Optic	ns Synchroni	zation Sche	dule				
Synchronize at the follow	ing times:			New Time	▼ Modify		Remove	
Time 🔺	Recurrence	Send Notification	Save Rec	ord Copy				
3/25/2020 8:00:00 AM	every day from 8:00 AM to	No	No					
3/25/2020 1:00:00 PM	every day from 1:00 PM to	No	No					
Scheduled updates require login information.	e file system credentials in oro	der to apply file syste	m permissio	ns when synchr	onizing files and	folders	s. Enter y	our \
Username:	Updat	e credentials for all n	ny scheduled	syncs 🕕				
Password:								
<b>&amp;</b>	Next action	n: Synchronize Co	ntents	~	OK Can	cel	Help	

10. To create a recurring synchronization of the folder, select **New Time** and then the **Recurring icon** next to the subject.

🜲 Create Scheduled	Task			_	
Subject: Share	d folder update -	E - CAD			Ø
Start Time: Wedne	esday, March	25, 2020			AM ~
Save a Record (	Copy of the publis	shed files			
Send Publish No	tification				
			ОК	Cancel	Help

11. The **Calendar Item Recurrence** dialog box appears. Select the desired recurrence values as needed and click **OK** to save the settings.

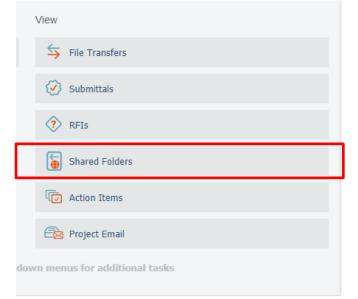
💑 Calendar It	em Recurrence X
Recurrence	pattern
O Daily	Recur every 1 veek(s) on
Weekly	🗌 Sunday 🔄 Monday 📄 Tuesday 🗹 Wednesday
O Monthly	Thursday 🗌 Friday 🗌 Saturday
○ Yearly	
 _ Range of re	
	nesday, March 25, 2020 🔍 T No End Date
	O End After:
	◯ End By: Wednesday, April 1, 2020 🗐▼
	OK Cancel Clear Recurrence Help

Only new or updated files will be synchronized.

# **Uploading Files to Shared Folders on Info Exchange**

Internal and external users can also upload information to shared folders on Info Exchange.

1. Log into Info Exchange and select the **Shared Folders** option in the **Shortcuts** menu.



2. The **Shared Folders** list appears. Select the folder where you want to upload files.

♦ NE	$\mathbf{N}$	FORMA.	1999009.001 - A
MY PROJECTS DIRECTORY -	PROJECT	Home send <del>▼</del> view <del>▼</del> Help <del>▼</del>	
Shared Folders Active		↓ DOWNLOAD SELECTED	
Name 1		Drag & drop files into the desired folder.	
		Name	Ť
Arch	TASKS 🔻		
Construction Photos	TASKS 🔻		
E - CAD	TASKS 🔻	E - CAD	TASKS 🔻
Final Photos	TASKS 🔻	Arch	TASKS -
G - Product Data	TASKS 🖛	Civil	TASKS 🔻
MEP	TASKS 🔻	Markups	TASKS 🔻
Milliken Road Widening	TASKS 🔻		
P - Photos	TASKS 🔻		TASKS 🔻
Photos	TASKS 🔻	Milestones	TASKS 👻

3. The contents of the selected folder are displayed. Click the **Tasks** dropdown next to the shared folder name and select **Upload Files** in the dropdown list.

			E)	• •
1Y PROJECTS	DIRE	СТС	DRY 🔻	PROJE
ared Folders	Activ	/e	•	
Name			Ť	
Arch				TASKS 🔻
Construction Photo	)S			TASKS 🔻
E - CAD	_			TASKS 🔻
Final Photos	Ć		Upload	Files
G - Product Data	E	Ť	Downlo	ad Folder
MEP	(	D	Folder I	Details
Milliken Road Wide	ening			TASKS 🔻
P - Photos				TASKS 👻
Photos				TASKS 🔻
Struct				TASKS 🔻
Test for Henry and	l ext a	cce	SS	TASKS 🔻

4. The **Upload Files** dialog appears. Complete the transmittal information and select the files to upload. Click **Upload** to upload the files.

Upload Files	8	
Folder:	<ul> <li>E - CAD</li> <li>Arch</li> <li>Civil</li> <li>Markups</li> <li>MEP</li> <li>Milestones</li> <li>Miliken Road Widening</li> <li>Models</li> <li>Plots</li> </ul>	•
Subject:	E - CAD	
To:	Bob Welder (MacDougall Construction) and one other <ul> <li>Bob Welder (MacDougall Construction))</li> <li>Adam Klose (Jefferson Mill Associates))</li> <li>Image: State Stat</li></ul>	
CC:	Sarah McKinney (Newforma)	
Remarks:	B I U S Tahoma ▼ 2 (10pt) ▼ A ∨ I = I = E E E E E E E E E E E E E E E E	
Reminders: Files:	If a recipient has not downloaded the transfer, send notification to me, recipients on (date)	
	Drag-and-drop files here	+
	UPLOAD CANCEL	

 Select the Tasks dropdown next to the shared folder name and select Folder Details. The Folder Details dialog box opens. Select the Change Log tab to track the upload.

hared Folders Acti	ive 🔻				-			
Name	Ŷ	ſ	Drag & drop files	Folder Details				
			Name					
Arch	TASKS 🔻			E - CAD		-		
Construction Photos	TASKS 🔻			INFORMATION	CHANGE LOG			
E - CAD	TASKS 🔻		🗁 e - CAD					
Final Photos	1 Upload Files	•	🗌 🗎 Arch	Action	Ξ.	Date	Ť	Member
G - Product Data	Download Folder		Civil	Action	,	butt	1	Member
MEP	<ol> <li>Folder Details</li> </ol>		Marku				<b>– –</b>	
Milliken Road Widening	TASKS 🔻		-					
P - Photos	TASKS 🔻			Created		4/1/2020 2:49:32 PM		Sarah McKinney
Photos	TASKS 💌	•	🗌 🗎 Milesto	Created		4/1/2020 2:49:32 PM		(Newforma)
	T+0//0	<b>   </b>	🗖 🥽 Millika					

## **Accessing Info Exchange Remotely**

Access the Info Exchange website from any laptop,  $iPad^{\otimes}$ , Android<sup>TM</sup> tablet or other device with an internet connection.

1. To access Info Exchange remotely, launch a web browser and go to the Info Exchange website. Use the **Search** window to search all items that can be accessed on Info Exchange.



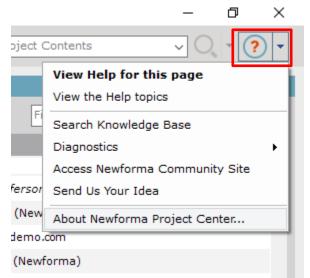
2. View the status of RFIs, submittals and other contract management project items by selecting them from the **Contract Management** section of the **View** menu.

	VIEW	HELP 👻				
	Files and Documents		Field N	lanagement	Contra	ct Management
Ī	⇆	File Transfers	Ð	Field Notes	Q	Cost Codes
ew	<b></b>	Shared Folders		Daily Reports	$\bigotimes$	Submittals
	ľ	Document Sets	ð	Site Visits	?	RFIs
<del>رز</del> . ا	đ	Document Control		Punch List		Bulletins
	Project	Information			C	Addendums
?	Ĉ	Open Items			Ċ	Supplemental Instructions
4	Ē	Project Email			$\bigotimes$	Proposal Request
.[		Action Items			Ø	Construction Change Directives
-0	20	Meeting Minutes			5/2	Sketches and Supplemental Drawings
m	22	Project Team				
		Project Calendar				
	Z	Markup Sessions				
I.	_		_			

*Global and project administrators control which activity centers are visible online through Info Exchange for both internal and external project team members.* 

# **Newforma Project Center Help and Support**

The question mark at the top right of the Project Center screen is the Newforma Project Center Help. The help defaults to the currently selected activity center. The help includes both overview and detailed information. There are also sections on Tips and Tricks and Frequently Asked Questions.



Clicking the dropdown menu to the right of the question mark allows users to access additional help resources, including the Newforma Customer Community (<u>https://customercommunity.newforma.com/</u>).

For additional information on support and services, please review our <u>Customer Care User Guide</u>.