**Newforma Project Center FAQ (11.5E)**

**Upgrade**

**Q. Is the 11.0 client compatible with an 11.5 Server?**

A. Yes.  Any 11.0 client is compatible with the 11.5 server.  However, an 11.0 server is NOT compatible with 11.5 clients.

**Personal Transfers**

**Q. What email systems do Personal Transfers work with?**

A. Personal Transfers are only supported in the Newforma add-in for Microsoft Outlook.

**Q. Can you expire a Personal Transfer?**

A. Yes, Personal Transfers can be expired in the Project Center Admin console. Go do the Transfers tab, then select a Personal Project transfer, then select the Expire task.

**Q. Can I customize the notification sent to users when I enable users to receive personal transfers?**

A. Yes, the notification is customizable. There is a template in the Template directory on the server: C:\Newforma\Templates\Eleventh Edition\UploadFileLink\UploadFileLink.doc

**Q. What server delivers the Personal Transfer?**

A. The home server for the user sending the transfer is used to deliver the Personal Transfer.

**Q. Where are transfers stored?**

A. Personal Transfers are stored on the Info Exchange Transfers folder along with other project transfers.

**Q. Where are Personal Projects stored?**

A. In order to create a Personal Transfer, Newforma Project Center creates a Personal Project. Personal Projects appear in the NPCS database and Info Exchange database, and the files being transfers are stored on Info Exchange. A Personal Project is created on demand when a user first initiates a Personal Transfer (not when the Personal Transfer options are enabled for an internal user on the Licensing tab). This helps to preserve space and help performance by not creating unused projects.

**Q. Who can see my Personal Project/Transfers?**

A. Personal Transfers appear in the Newforma add-in for Outlook in the View Transfers dialog. A personal project is never listed in any of the Project lists that appear in Newforma. Personal Transfers are listed in the Transfers page in Project Center administration by selecting All Personal Projects from the Projects drop down list. This gives administrators visibility to company data similar to how they have access to Email data.

**Q. Are record copies created for Personal Transfers?**

A. No record copies are created for Personal Transfers. The files that are sent from the user’s laptop serve as the record copy. The transfer is stored on the Info Exchange server and backed up with regular transfers. By default, they expire and are deleted after 30 days

**Q. Is there support to merge an existing project created for a user with a user’s Personal Project?**

A. There is no support to merge an existing NPC project with a user’s Personal Project.

**Q. How does my Personal Project get re-pinned if I change my home server on the licensing tab?**

A. If you change a home server, the personal project is re-pinned to the new server and the application displays a message stating that the project is being re-pinned.

**Q. How do Personal Projects affect system resources?**

A. Personal projects do add to the database after users create their first transfers.

**Q. Will we be able to limit the size of the personal transfer boxes and give them an expiration time?**

A. There is not a setting specific to limit the size of personal transfer boxes. Personal Transfers are sent through Info Exchange just like regular transfers. By default they are set to expire in 30 days, this is an option available on the Send Transfer dialog.

**Q. Is the personal transfer license change cost extra for each user?**

A. No, there is no additional charge.

**Q. Is the file folder/personal folders on my server or some chain link server?**

A. It is on your Info Exchange server where regular transfers are stored. The difference is, Personal Transfers are managed through MS Outlook.

**Q. Where does Newforma store the data from personal transfers?**

A. The files are stored on the Info Exchange server. The user interface to manage the personal transfers is accessible through the MS Outlook add-in View Personal Transfers dialog.

**Q. Can we bulk Modify many users to allow Personal Transfers in Admin?**

A. Yes, multiple users can be selected and modified at once. There are also two new columns for personal transfers that make it easier to see who has the feature enabled.

**Q. Can you forward the personal transfer link?**

A. Yes, the link can be forwarded to anyone. It’s just like any other link to a website.

**Reporting**

**Q. What are the new image formatting enhancements?**

A. Customers can specify the number of images that appear in a row; and the size of the image:

* Small (2 inches wide at selected resolution)
* Medium (3 inches wide at selected resolution, default)
* Large (5 inches wide at selected resolution)

Users may also specify the resolution of the image Screen (96 dpi, default), Print (150 dpi), and High Quality Print (300 dpi).

**Q. Are there any behavior changes for the reports in 11.5?**

A. Yes, Project Email now honors the columns that are displayed in the log view for the Log View reports. In the past, the columns used in the Log View reports were hardcoded.

**Q. Where did the Punch List reports go that used to be in the Report flyout on the task menu?**

A. These reports now appear in the Specialized Reports list in the Report dialog. Customers who had customized the reports will need to update to the new XLSX format or can change a registry setting to display the old flyout to display the old reports.

**Q. When I change the Query Definition in the report, will it update the report contents?**

A. No, the contents of the Query Definition tab are processed when the report is generated. To change the report content, the Query Definition will need to be changed on the template, then rerun the report.

**Q. Where can I find the Reporting Blog posts?**

A. These are in [Confluence](http://confluence.newforma.com:8090/display/TWFI/2015/01/11/Smartmarker%2BReport%2BQuery%2BDefinition%2BTab%2BDocumentation).

**Q. Is there a report for field notes that features images as well?**

A. Yes, there is a new specialized report available in 11.5 that contains images – it is called “Field Note Log Report With Images”

**Project Extranet Support**

**Q. Does the extranet sites also include Apps such as PlanGrid or BuzzSaw?**

A. Any location with a URL, web address or file path can be used.

**Q. How do passwords work for using the upload to extranet sites?**

A. If login credentials are required, you will still enter those in at the time of the transfer.

**Q. When using the new Manifest file project setting for Document Control, are there any changes for Transmittals?**

A. The only change is that manifest files are not supported for Draft transmittals.

**Q. Can I specify the format of the manifest file that gets created?**

A. Yes, there is an option in the spreadsheet to set the “<output file type>” to XLS, CSV, etc.

**Mobile App Configuration Enhancements**

**Q. Who can use the new feature to be automatically added to Project Teams and automatically set up My Projects?**

A. This applies to internal users only and only for the persons adding a project to My Projects or adding themselves to a project team.

**Q. So every project I am a team member of goes into my 'My Projects' list, or just the ones that I have NIX access?**

A. A project is added to your My Projects tab only when you add yourself as a team member. If someone else adds you as a team member, the project will not be added to your My Projects tab. This feature is not dependent on having access to Info Exchange.

**Q. After enabling mobile apps it was mentioned that team members need to be granted access individually, so enable mobile apps enables it for that project and then we have to back and enable it for the users correct?**

A. The Setup Mobile Apps, enables the Activity Centers needed from mobile use. Afterwards, each user still needs to be given access to the project on the Info Exchange website

**Q. Adding to the project list, does it happen for anybody in the office that adds themselves?**

A. Yes, this is an automatic feature that happens any user when they add themselves to a project. It does not need to be enabled, nor is there a way to disable it.

**Q. Does Newforma Project Center automatically remove a project that is inactive/dormant from the My Projects list?**

A. No, removal of projects in the My Projects tab is managed by the user. There is a Last Accessed column that a user can view to help manage the list of projects in My Projects.

**Q. Will you still be able to add to My Projects without joining the Project Team and vice versa?**

A. Yes – the task to Add or Remove from My Projects is still available to manually manage the My Projects list.

**Q. Can you add yourself to the project team from the Newforma mobile app?**

A. No, you cannot add yourself to the project team from the mobile apps. In order to use the mobile apps, the project needs to be on your My Projects tab and you need to be a member of the project team with access to the Info Exchange website.

**Q. Is the Auto Add only for the apps?**

A. It’s not only for the apps, but a primary goal of this new feature is to make use of the mobile apps easier.

**Q. To use the mobile apps, do you have to run that button every time or is that just a back-check?**

A. It is mostly a back-check as these are global settings. However some Activity Centers may have been disabled for various reasons so it’s a good idea to click the Setup Mobile Apps link.

**Q. Can you opt out of the Auto Add if you do not want to have all projects as My Projects?**

A. No, there is no opt-out but keep in mind, projects are only added to your My Projects list if you add yourself to the Project Team.

**Q. If you remove a project from your list, are you also removing yourself from the Project Team, and vice versa?**

A. Yes, that is correct.

**Q. I add myself to almost every project because I am the Doc Ctrl Admin, but I do not always want EVERY project on the My Projects tab. Will I have to remove each project that I do not want on my short list?**

A. You may consider having someone else add you to the Project Team instead. Also consider that you can access the majority of project information even if you are not on the Project Team.

**Q. What does the Setup Mobile Apps task do?**

A. When this task is selected, a dialog appears displaying the status of the project for mobile app use. It checks if the project is on Info Exchange, if the mobile activity centers (Field Notes, Action Items, etc.) are enabled, and if these activity centers are enabled on Info Exchange. A Project Administrator or Global Administrator is the only user who can make the changes. If a non-admin selects this task, a message appears letting that person know to reach out to an Admin for set-up.

**Q. What happens if the user isn’t licensed for a mobile feature? For example, Punch List requires an Newforma Contract Management license.**

A. In 11.5, we are not currently checking if they are licensed for the features. The only activity center that would require a license is Punch List.

**N2N Enhancements**

**Q. Are the N2N enhancements backwards-compatible?**

A. The recipient company has to be on the transfer; Sending company is not (checking is done on recipient side).

**Global Outlook Threshold**

**Q. What is the best way to set up the Global Outlook Threshold with the Microsoft Exchange Server threshold setting?**

A. When the Outlook Exchange threshold is hit with an attachment, Outlook immediately displays a dialog informing the user the attachment is too large. Unfortunately, NPC has no way of intercepting this and providing the option to send through Info Exchange. The best practice is to increase the size of the Exchange limit and let Newforma intercept the transfer to give the user the option to send through Info Exchange. The other option is to select Send Transfers in the Outlook add-in.

**Q. Is the threshold setting both incoming and outgoing?**

A. This setting only affects outgoing emails

**Q. Is the email limit set in Outlook?**

A. The Global Threshold is set by a system administrator in the Newforma Project Administration console on the Global Settings tab.

**Q. If we use the max attachment size setting, do users have to be in the office for the NIX file transfer to work? Or will it work from any internet connection?**

A. The Global Threshold setting is invoked when sending email using MS Outlook on your work computer. If you have a laptop and are connected via VPN, it will function the same as if you were in the office.

**Newforma Project Center FAQ** **(11E)**

**EDMS**

**Q. What electronic document management systems does NPC integrate with?**

A. Bentley ProjectWise, IBM FileNet, and Microsoft SharePoint.

**Q. What versions of the EDMS providers does the plug-ins support?**

A. We currently support the following versions:

* FileNet – 5.1
* ProjectWise – versions 8.11.09 and up are recommended
* SharePoint – 2010 and 2013

**Q. Does Newforma plan on creating more plug-ins?**

A. We will look at other opportunities based on market demand.

**Q. Does EDMS come with the NPC product?**

A. Yes, the EDMS feature is a part of a standard NPC license.

**Q. How do I configure my EDMS plug-in?**

A. Connections to EDMS are defined as a Global Setting in the Project Administration Console. Simply provide a name for the connection, select the EDMS provider and enter the necessary information to make the connection (hints are provided in the user interface to and Help locate the information required for the connection). Once the global connections are made, you can select an EDMS folder to add to the list of project folders in the Project Settings.

**Q. Why can’t internal users see files from EDMS on Info Exchange and Mobile Apps?**

A. In 11.0, NPC requires Single Sign-On capabilities to authenticate users on Info Exchange and Mobile to check permissions for access to files.

**Q. Can I configure multiple EDMS plug-ins?**

A. Depending on the system, the

* SharePoint – Any number of SharePoint connections are allowed
* ProjectWise - All configurations to the **same** data source must use the same credentials
* FileNet - All configurations to **any** data source on **any** server must use the same credentials

**Q. Can I use more than one EDMS on a project?**

A. Yes, once you globally configure EDMSs, each system can be added as a separate project folder in Project Settings.

**Q. How will the EDMS files appear in NPC?**

A. EDMS file and folders will appear as a new folder in NPC in the Project Files activity center and any other place you would access files within NPC (such as adding EDMS files to supporting documents on Action Items). The same structure that is found in the native EDMS will appear within Project Files or within a file picker dialog.

**Q. What kind of functionality/workflow can I expect to perform on the files that are stored in the native EDMS app?**

A. Because NPC treats files as though they are like any other Project File, NPCs workflow/functionality features that are available for files on a file server are also available for files in EDMS.

**Q. Will my workflow change by using this feature?**

A. NPC supports many of the standard EDMS features such as Check In, Check Out, Get Latest Revision, etc. For advanced options not provided in NPC, use the Select in [EDMS] task to access the document in the Native EDMS to perform a certain function.

**Q. Does NPC track changes made in the native app as well?**

A. Because NPC has full access to whatever version history is available through the native EDMS APIs; we track all the document add/update operations the native EDMS is configured for.

**Q. If I check a file out in the native EDMS app, will it show as checked out in NPC (and vice versa)?**

A. Yes.

**Q. Are there any file size limitations with this feature?**

A. Any limitations will be determined by your native EDMS system. This may vary by system.

**Q. What file types are supported by the EDMS feature?**

A. Any file that is supported by your native EDMS application is supported within the EDMS feature.

**Q. Who do I go to for support with the EDMS feature, Newforma or our EDMS provider?**

A. If it is a problem with accessing files through NPC or adding workflow to those files through NPC, then you contact Newforma. If the problem is related to your native EDMS, then you contact the EDMS provider.

**Q. Do you need ProjectWise installed?**

A. ProjectWise is required on the server to make the connections and a ProjectWise client is required to be installed for end users connecting to ProjectWise as well.

**Q. Does the File Discovery tool used in Batch Project Creation in Project Center Administration work with EDMS?**

A. Yes

**Q. How does our work server affect EDMS Integration? Deployment?**

A. Our work servers are EDMS-aware, and work the same way as NPC/NPCS do against an EDMS provider.

**Q. In the event of a disaster – when NPC projects and global data are restored on a project with an EDMS connection; will the EDMS connection be restored?**

A. Yes.

**Send Transfers through Outlook and Explorer**

**Q. What Info Exchange options are exposed to the user?**

A. Users can choose the Expiration Date, Reminder Options, Allow recipients to download partial contents and Require Info Exchange login to download. Other Info Exchange options are not available: Transfers are only sent to specified recipients and the Hide Recipient list option is not available.

**Q. What project settings are used when sending a transfer through Outlook?**

A. For transfers that are sent through Outlook, the following project settings are used for file transfers: Hide recipients on all transfers and transmittals, Require all external recipients to sign in to receive transfers, Require a transmittal on every outgoing Info Exchange transfer, Include transmittal in contents (instead of email attachment). If the Record Copy option is set to Required, a record copy is created for each transfer. If it is set to Optional, no record copy is created.

**Q. Can I send a transmittal through the Outlook add-in?**A. Only file transfers can be sent through the Outlook add-in. If a transmittal is required in the project setting, the standard Transmittal dialog and transmittal options appear after completing the Send Transfer dialog (all information is copied over). If a user wishes to send a Transmittal, they will need to use NPC to send the files.

**Q. If sending to a distribution list, does the distribution list get expanded? Does de-dupe happens on the exchange server side?**

A. Yes

**Q. Is there any setting to enable the file transfer capability in Window Explorer and the Tray tool?**

A. If the tray tool is enabled in user preference, the Send Transfer feature is available. There is no setting for Window Explorer. If Project Center is installed on your machine, the menu option is available.

**Q. Why don’t I see the Send To > Info Exchange and Send To > Newforma Project Folder options on a Terminal Server?**

A. These options are not supported on a terminal server.

**Document Control**

**Q. What happens when you delete a record document from a package? It is removed from the package?**

A. Any of the previously issued packages will show that the record document existed in the package with in the zip files.

**Q. How does the download link work for packages in a notification?**

A. Download All Associated Files in the notification will download packages organized within a package per folder.

**Q. Is there a way to download all record documents?**

A. To do this, users should create a package that contains all the record documents for easy download on Info Exchange.

**Q. Does the Package issue history on Info Exchange show issuances other than Info Exchange?**

A. Yes, it will list issuances through email for example, but one click download is not available. Individual record documents are still available.

**Q. What's the difference between Add a Similar Package and Create a new Package and select a package?**

A. Add a Similar Package copies the record documents, team members, discipline, keywords, remarks, email log, related items. Create a Package and choose and existing package just selects the documents and adds them to the new package.

**Q. For alphabetical revision numbering, what happens when I hit the end of the alphabet?**

A. The revision numbering continues to AA.

**Q. What happens when I remove a revision from document control?**

A. The system will continue with the numbering from the most recent version.  The removed revision will not be reused.

**Q. Is the list of Packages available on Info Exchange?**

A. Yes

**Q. Can everyone see all Packages on Info Exchange?**

A. No, one can only see the Packages issued to them.

**Q. Can the Packages be nested similar to Document Sets?**

A. No, the packages cannot be nested. But you can pick existing packages to add all its record documents to the current package.

**Q. Are the packages tied to a particular revision of record document?**

A. No, packages are tied to record documents and not revisions. They always point to the latest revision of a record document.

**Q. What is the difference between a package and a transmittal?**

A. A transmittal always point to the record copy of issued documents. Packages point to the latest version of record documents.

**Q. With the revised log view, can I see the Related Items specific to a revision of a record document?**

A. Yes, one can now view the issue history, related items and change log for a specific revision.

**Q. Can Packages be locked down to represent a submittal and not use the latest Revision?**

A. No, currently packages always use the latest revision.

**Shared Folders**

**Q. Are we adding a continuous sync option similar to Box.net or Dropbox?**

A. No. Not at this time. We believe there are still advantages to having a controlled sync schedule. There are also technical hurdles that make a continuous sync outside of our scope.

**Viewer**

**Q. Are the call out and dimension tools supported on Info Exchange?**

A. The call out and dimension tools will appear in view only mode, it is not possible to create using these tools at this time.

**Q. Are the call out and dimension tools supported on Plans markup?**

A. The markups will appear in the Plans application, however, the image is flattened. These tools are not available in the mobile application.

**Q. Can I rotate callouts?**

A. It is not possible to rotate a callout, however, there is a work around:

* Delete leader then the rotate grip appears
* Rotate the annotation
* Right click and add leader

**Q. Can I add cloud shape in a callout?**

A. No, right now we do not have an automated way to add cloud around a callout. We might add this in future based on market demand.

**Q. Can I add shape around the text in a dimension?**

A. No

**Q. Can we change the properties on a number of selected items on screen?**

A. Not individual properties, however you can assign a pen type to them which are a group of preset properties.

**NBIM**

**Revit to Document Control**

**Q: My virus software is telling me there is an issue with config.exe in the Newforma PDF application.**

A: There is a program named config.exe that is part of the printer API, however it does not contain a virus. The recommendation is to update your virus scanning definition file and or add this file to you trusted files filter in your software so it is no longer scanned.

**Q. What PDF drivers are supported by this feature?**

A. Newforma supplies its own driver, based off of the popular BioPDF driver. We also support Adobe and Bluebeam drivers.

**Q. What about drivers not on the supported list?**

A. We will consider additional drivers based on market demand. The driver must allow us to control where files are published or renaming of PDFs, if not, it is unlikely we will support the driver.

**Q. Is the Print Setup information stored in NPC or Revit?**

A. It is saved with the Revit Model. You must save the model to save the set up information.

**Q. Why don’t I see the entire page set up list that I see in Revit?**

A. It shows only the setups that are valid for the selected PDF driver.

**Q. Are setups tied to PDF drivers?**

A. No they are not tied to drivers, but the setup is available only if it is valid for the selected driver.

**Q. Does Synchronize and Add Revisions work the same way as Add Revision from Files task in NPC?**

A. No, they do not work the same in 11.0. The Synchronize and Add Revisions in Revit checks the existing values of Revision number, date and state before making any changes. Add Revisions from Files increments the revision if the file has been modified.

**Q. What parameters are compared between Revit and NPC before updating the revision information?**

A. The revision number, date and state are checked before update any revision information in NPC.

**Q. If a Revit sheet has no revision, where is the corresponding PDF stored in NPC?**

A. A new revision 00 is added in NPC corresponding to no revision in Revit and the file is linked to this revision.

**Q. Does the Revision and Revision Date columns on the “Synch and Add Revisions” dialog show the information from Revit?**

A. Not always, it shows the values of the source parameter. So if the revision information is mapped from Newforma to Revit, it will show the values coming from NPC.

**Q. What rights does a user need when using this feature with EDMS?**

A. The user publishing from Revit will need Read and Create rights at the file and folder level on the EDMS to support Newforma’s ability to create folders and files per publish.

**Q. What happens when a Revit sheet name contain invalid characters such as / and \* that are supported in Revit but not in the file system?**

A. These characters will automatically be changed to \_ in both the Revit PDF name and in NPC for consistency. Hyphens are not supports as some EDMS system do not support these characters.

**Q. Some companies start their Revision Numbering with letters before the project goes out to bid, and then switch to numbers later. Will this mess up the “Synchronize and Add Revisions” task in Revit?**

A. When the revision number is changed from alphabet to numbers or vice versa, use the “Publish Sheets” task (in Revit) and use the “Add revision from files” task (in NPC) once; before using the “Synchronize and Add Revision” functionality in Revit. This process will add a new set of Revisions for the Record Documents irrespective of the state (draft or Issued) of last revision.

**ADMINISTRATION**

**Server Reduction**

**Q. How can the similar performance of an NPCS co-located with project data be approximated by an NPCS remotely located away from the project data?**

A. The introduction of additional “work services” perform file filtering for indexing (currently supported in 10E), email summarization, DWG rendering and PDF OCR Processing for files in remote offices reduce the need for an NPCS in each office. These additional enhancements improve data processing across a WAN and provide significant improvements to how the Project Center client retrieves and displays that data to users across the WAN.

**Q. How are NWSs deployed, updated and upgraded?**

A. Newforma Work Service installations/upgrades/updates are managed either manually or via group policy deployments.

**Q. What are the hardware requirements for an NWS?**

A. Newforma Work Services will be supported on any machine that will support NPC or NPCS and does not have to be a dedicated resource. Use this [link](http://help.newforma.com/Newforma_Project_Center_Eleventh_Edition/desktop/Tip_and_Tricks/Project_Center_System_Requirements.htm?rhsearch=system%20requirements) to determine system requirements for these products.

**Q. What are the network requirements for a successful implementation of an NPCS ⬄ NWS environment?**

A. NWS will be loading files over the network either from an EDMS source or a file server so a good network connection will help speed along the filtering. NPC does not not allow an NWS to filter a file over the WAN for performance purposes. By default we expect ping times between NWS and the data source to be < 10ms.

**Q. How can the performance of the overall system and individual NPCSs and NWSs be monitored, troubleshot and optimized?**

A. The Project Center Administration Servers tab provides many of our existing filtering metrics along with some others. There are also performance monitor logs and error logs that can be viewed from Administration page.

**Q. Does this process support NPCSs managed in a cloud environment?**

A. No. The client and all services communicate via LAN/WAN and cannot be configured to communicate via the Internet.

**Q. Is Outlook required on machines which a Newforma Worker Service is installed?**

A. Outlook is not required, however Microsoft Office should be installed on machines on which NWS is deployed.

**Q. Can pre-11th Edition NFS be “upgraded” to an NWS?**

A. No. It will be necessary to uninstall an existing NFS and install NWS.

**Client Scalability**

**Q. When does the search based user interface appear?**

A. By default, the search interface appears instead of the full list when the list exceeds 10,000 (LAN) or 1,000 (WAN). Note that this is customizable through a registry setting.

**Q. What lists are affected by the behavior?**

A. Contacts (contact directory and Contacts in Project Center Administration), Project Team chooser, Companies and Projects.

**Batch Project Create**

**Q. How does the Batch Project Create feature help to identify the appropriate “Project folder(s)”?**

A. To start the process, point to the “root folder” where project data is stored. With the Project Number as the key, it searches the sub-folders for folder names with matching strings and “suggests” matching folder or folders as a possible project folder. There are controls to help format project numbers to match folder names if needed and flexibility to drag and drop folders that don’t match the search format.

**Q. What kind of error checking is performed prior to or during the project import?**

A. Batch project create identifies projects that:

* Do not have project folders that match the criteria
* Detects if multiple folders are a potential match and requires additional filters be applied or a manual selection of the correct folder be made

**Q. How does Batch Project Import handle projects with missing critical data?**

A. The tool will first warn that a project will be created with missing data and require that the administrator confirm that process is OK prior to creation.

**Q. Can the project import information persist across multiple NPC sessions?**

A. Yes – the data used for project import is stored in the NPCS database and can be accessed and modified multiple times prior to import. The process can also be managed in Microsoft Excel spreadsheets outside of NPC.

**Q. Is it possible to batch import projects that do not have any project numbers associated to them?**

A. Yes – although matching the project folder is based on the project number, Administrators can drag and drop the correct folder to associate the project folder with the project number. Administrators can also edit the list of projects in a spreadsheet and manually or programmatically (using Microsoft Excel functions) enter the correct folder location there.

**Template Projects**

**Q. Where can I see Template Projects?**

A. Template Projects live in the Projects tab in Project Center, there is a Template column that identifies if the Project is a template or a project.

**Q. Can I use an existing Spreadsheet Project Templates (Microsoft Excel based templates stored on the file system) as a new database based Template Projects?**

A. Newforma still supports Microsoft Excel based templates. Excel based templates can be converted to the upgraded format and be used to create a Project Template. Once they are updated as Template Project in the Project Administration Console, they will always be updated automatically with any upgrade.

**Q. Can Template Projects be created from existing projects?**

A. Yes – Template Projects can be created from an existing project or from another template.

**Q. Does a Template Project require a “root folder” to be associated with it similar to projects?**

A. Yes, a temporary but real folder location will need to be defined when a Template Project is created. The template project folder is not copied over when creating a project from the template. An administrator can use the same project folder for all Template Projects.

**Info Exchange Secure Passwords**

**Q. Does Newforma send plain text passwords?**

A. No, when a new account is set up or a password reset is requested, the user is prompted for their new password and a confirmation.

**Q. Are the requirements for password creation flexible?**

A. Yes, an administrator can set the expiration, prohibit reuse, set the length requirement, and require mixed case, alphanumeric and/or special characters.

**Q. What if I change the password requirements after a password reset has been issued?**

A. The user will get an error when they try to reset stating the request is out of date. A new password reset must be issued.

**Q. Is there a white paper available?**

A. Please check with Marge Hart for availability.

**Q. Will we have a security certification?**

A. Not at the moment, but can provide a whitepaper on the work that we have done

**Q. Are passwords stored in a non-reversible format?**

A. Yes

**Q. How does password reset work?**

A. When the user clicks the Forgot Password link, and an email notification is sent with a link. Click the link to go to a page to enter the new password and a confirmation. The notification contains a one-time use link that expires after 2 hours

**Q. Has the lock out behavior changed for Info Exchange?**

A. No

**Q. How many times do we check re-use?**

A. We check back to last 24 passwords. This is a Server configurable value.

**Q. Where did the Permission Sets tab go in Project Settings?**

A. It was changed to Security for the 11th Edition release.

**Q. How does the new password security impact NewformaID and the Info Exchange logins?**

A. NewformaID will require you to login with Newforma ID and Info Exchange password every 8 hours. There is no change in behavior for mobile app logins.

**Q. When I download a file on Info Exchange, will I see any changes?**

A. Yes, instead of just opening the file in the browser, users will now be prompted to Open or Save the file.

**Q. Are there any effects on Info Exchange cloud delivery integration with Newforma ID?**

A. Yes, a user used to sign in with Newforma ID to get to Cloud delivery tasks. Now, when you click on delivery for Cloud, the user is asked to sign in or create Newforma ID.

**Change Project Settings**

**Q. Who has the ability to make field changes on multiple projects at once?**

A. Global administrators have access to a Change Project Settings task that is available when one or more projects are selected in the “Projects” tab in Project Center Administration.

**Q. Can I see what value is currently set for a particular field?**

A. When a single project is selected, the current value is shown with a check-mark next to it to clearly indicate the current selection and all the options. This is not available when more than one project is selected.