# Newforma Info Exchange Quick Start Guide for External Users

### **Overview**

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

This guide covers the following topics:

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

## **Using Info Exchange**

#### To log into Info Exchange after receiving an invitation

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

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

#### To receive a file transfer

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

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

Transmittal - 01495_1.pdf 63 KB	
oject: Newforma File Sharing	
Notification about File Transfer Project Transfer	
Remarks	
Please see the attached information.	
	Download all files
File Transfer Info	
Purpose: For Your Use Expiration Date:	
Transferred Files	
kitchen.jpg	
Additional Links	

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

Sign in to Newforma Info Exchange	
Username	
Password	
Forgot password? <u>Newforma ID</u>	2
SIGN IN	
Remember username	

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

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

ansfer				🔆 File Transfers 🛛 🌯 Send Similar	Send Email	SView Form
ibject: Project Transfer orm : (Newforma) :: Adam Klose	Date Sent : Expiration Date : CC:					
REMARKS FILES CHANGE LOG						
DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED	Configure Cloud Deli	ivery				
Name	1 Туре		Size	Date Modified		
Project Transfer	TASKS * **					
🔲 🗟 kitchen.jpg 🛞	Image		615 KB	OVERALE ALLERIES IN		

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

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

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

#### To send files from Info Exchange

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

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

- 1. Log into Info Exchange and select the appropriate project.
- 2. Click **Send > Files** in the menu bar from the **Project Home page**: MY PROJECTS PROJECT HOME SEND - VIEW - HELP -Shortcuts Send View Files Sile Transfers Submittals 🧭 Submittal 💎 RFI RFIs Shared Folders C Action Items Project Email
- 3. Fill in the transmittal information, including selecting recipients for the file transfer from the project team members list:

Send a File T	ransfer
Subject:	(Required)
To:	Select contacts
CC:	Select contacts
Remarks:	B I U S Tahoma ▼ 2 (10pt) ▼ A ∨ III III 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 , clubel me , (date)
Files:	ADD FILES REMOVE ALL FILES
	Drag-and-drop files here
	SEND FILES CANCEL

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

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

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

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

sho	wn below:							
File Trans	fers Inbox	Send Files					Export	
	Subject	Related Items	From	Date Sent $\qquad \downarrow$	Expiration	Size	Access T	Downloaded?
				▼ T	▼ 7	Т		•
\$	Project Transfer		Lori Beekman (Newforma)			614 KB	Recipients only	
Total iten	ns: 1							Show rows: 50 -

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

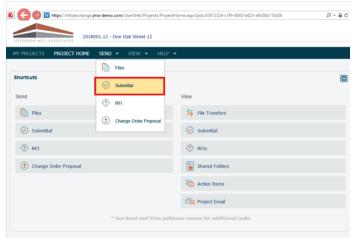
ansfer			🔆 File Transfers 🛛 🗞 Send Similar 🔄 Send Email 🖉 View Form
ubject: Project Transfer Date Sent : rom : (Newforma) Expiration Date o: Adam Klose CC: REMARKS FLES OWINGE LOG	-		
DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED CONTENTS CO	figure Cloud Delivery		
Name	î Type	Size	Date Modified
🗋 🖻 Project Transfer 🛛 TASK	v =	-	-
kitchen.jpg	Image	615 KB	

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

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

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

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



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

Subject:	(Required)
ubject.	(Kednied)
0:	Select contacts
C:	Select contacts
ction:	For Review
Spec Section:	
temarks:	B I U 5 Tahoma ▼ 2 (10pt) ▼ A ~ HE E E 26 26 26 26 26 26 26 26 26 26 26 26 26
eminders:	If a recipient has not downloaded the transfer, send notification to _me , _recipients on (date)
iles:	ADD FILES REMOVE ALL FILES
	Drag-and-drop files here

3. Click Send Submittal.

#### To respond to a forwarded submittal

When you receive a request to review a submittal via Info Exchange, you can easily respond through the same interface.

1. You will receive an email notification of a request for review. Follow the link at the bottom of the email to log into



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

You have been f	orwarded an item to review. Select Markup and Re	espond to view	the Submittal, with any c	omments and send the response.			
Submittal Forv	warded				Submit	tals Send Response	Markup and Respond
Subject:	Walkway paving	Transmittal I	ID: 00272				
To:	Bob Welder 12 (MacDougall Construction 12)	Date Sent:					
CC:	-	Via:	Info Exchange				
From:	Adam Klose 12 (Jefferson Mill Associates 12)	Due:					
Submittal ID:	00 21 00-00001						
Sender ID:							
Purpose:	For Review						
To view and dov	vnload, click Walkway paving						
REMARKS *	FILES * CONTENTS * EMAIL LOG						
DOWNLO/	AD ALL CONTENTS DOWNLOAD SELECTED						
Name			Ť	Туре	Size	Date Modified	
🗌 🖻 Wa	lkway paving		TASKS -	-			
	Alpengrove - A208.pdf			Portable Document Format	846 KB		
	Transmittal Submittal - 00 21 00-00001 (Forwar	ded) 1.pdf	۲	Portable Document Format	63 KB		

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

You have been f	orwarded an item to review. Select Markup and Re	spond to view the	Submittal files, markup with any comments and send the response.			
Submittal Forv	varded			숙 Submittals	Send Response	Markup and Respond
Subject:	Walkway paving	Transmittal ID:	00272			
To:	Bob Welder 12 (MacDougall Construction 12)	Date Sent:				
CC:		Via:	Info Exchange			

4. Complete the Send Submittal Response page and click Send Response. Send Submittal Response

Submittal ID:	00 21 00-00001
Subject:	Re: Walkway paving
To:	Adam Klose 12 (Jefferson Mill Associates 12)
CC:	Select contacts
Action:	(Required)
Response:	B I U 5 Tahoma    2 (10pt)    A    i≡ i≡ i≡ ≡ ≡ ≡ ≡ ■ ■ ■ ■ # + + + + + + + + + + + + + + +
Reminders:	If a recipient has not downloaded the transfer, send notification to $\mbox{me}$ , $\mbox{recipients}$ on $\mbox{(date)}$ .
Files:	ADD FILES REMOVE ALL FILES
	Drag-and-drop files here
	SEND RESPONSE CANCEL
	To upload files totaling more than the maximum, use Newforma's Silverlight upload control.

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

2910001.12 - One				
Y PROJECTS PROJECT HOME SEND +	VIEW • HELP •	Field Management	Contract Management	
Shortcuts	5 File Transfers	Field Hotes	💮 Bubwitzi	
Send	Bhared Folders	Daily Reports	③ RFIs	
C Res	Document Control	Ste Vals	📑 Bulletins	
Submittal	Project Information	Punch List	📑 Supplemental Instructio	0
🛞 REL	Open Neres		Proposal Requests	
(1) Change Order Proposal	Car Project Email		Construction Change D	nactives
(a) counte const contrast	Action News		(1) Charge Order Proposal	
	20 Meeting Minutes		Change Onters	
	Report Team		ages Contracts	
* SI	e Project Calendar		🧏 Sketches and Suppleme	ental Drawings
	Martup Sessions			

#### 6. The submittal log displays like this:

	ittal All My Action		Send Submittal				
rag	a column header here to g	roup by that colur	n				
D	ID	Sender ID	Subject	Received	Forwarded	Response 4	Closed
	10 20 10-00002		Kitchen information		3/31/2020 For Review 🌒	3/31/2020 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	00 65 00-00001	03162020	Furniture	3/16/2020 For Review From: Bob Welder 12 (MacDougall Construction 12)	3/17/2020 For Review ④	3/17/2020 Pending From: Bob Welder 12 (MacDougall Construction 12)	
	07 90 00-00001		Landscaping		3/16/2020 For Review 🌢	3/16/2020 No Exceptions From: Bob Welder 12 (MacDougall Construction 12)	
	05 70 00-00001	1234	Windows		1/24/2020 For Review 🕱	1/24/2020 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	99 10 00 A-00001		#12312019 - Kitchen		1/10/2020 For Review T	1/10/2020 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	21 10 02-00001	12312019	#12312019 - Kitchen		12/31/2019 For Review	12/31/2019 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	00 11 00-00001		Information on project		11/15/2019 For Review	11/15/2019 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	10 20 00-00006		Package 1		7/19/2019 For Review 🕎	7/19/2019 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	

#### To view and update action items

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

 If you receive an email notification that you have been assigned an action item, you can follow the link in the email to log into the site and view or update the action item. You can also log into the site and click View > Action Items from the menu bar or use the shortcut from the Project Home:

MY PROJECTS PROJECT HOME SEND - VIEW - HELP -	
Shortcuts	
Send	View
Files	S File Transfers
🐼 Submittal	🐼 Submittals
🛞 RFI	RFIs
	Shared Folders
	C Action Items
	E Project Email

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

Actio	Action Items Open 🗸 China Item										
	0	Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority T	Status T	Action Completed	Supporting Documents
		<b>• T</b>								τ.	
1	0		00162	Review drawings	与	Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		-
/	0		00166	Hole in wall		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file
/	Ф		00168	Order wallpaper		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress		-
/	0	1	00170	Friday meeting prep		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		

3. View the main information and see additional information on the Description, Discussion, Email Log,

Action Item							<table-cell> Modify</table-cell>	🌯 Add Similar	🖂 Send Email	🗟 View F
Subject:	Review drawings		ID:	00162						
Status:	Not Started		Type:	Action Item						
Percent Complete	e: 0 %		Priority:	Normal						
Assigned:			Disciplines:							
Due Date: Remind:	disabled		Assigned To:	Bob Welder 12 (MacDo 12) and one other	ougall Construction					
Action Completed	d:		CC:							
Keywords:			Assigned By:	Adam Klose 12 (Jeffer 12)	son Mill Associates					
DESCRIPTION	DISCUSSION	EMAIL LOG	SUPPORTING DOCUMEN	TS RELATED ITEMS	CHANGE LOG					

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

Modify Action Iten	n								
Subject:	Review drawings	teview drawings							
Туре:	Action Item	-	ID:	00162					
Status:	Not Started	-	Disciplines:	▼					
Percent Complete:	0	Ŷ	Assigned To:	Bob Welder 12 (MacDougall Constructi					
Priority:	Normal	-		Bob Welder 12 (MacDougall Construction 12)					
Assigned:	8/6/2019	-		Carolyn Hunter 12 (Hunter Electric 12)					
Due Date:	8/14/2019	-							
	Remind 2 🗘 days be	fore due	CC:	Select contacts					
Action Completed:	(No Completed Date)	-	Assigned By:	Adam Klose 12 (Jefferson Mill Associat					
Keywords:				•					
DESCRIPTION	DISCUSSION EMAIL LOG	SUPPOR	TING DOCUMENTS	6 RELATED ITEMS CHANGE LOG					
	_	_	_						
в <u>г</u> <u>ч</u> <del>с</del>	Tahoma • 2 (10pt)	<ul> <li>■ A<sub>2</sub> ∨</li> </ul>		III 2 III do 🛅 🤝 🚠					
review inclu	ded drawings.								
SAVE	SAVE & CLOSE CANCE	Sen	d change notificatio	n email					
SAVE	SAVE & CLOSE CANCE	Jent	a change nouncau						

#### To create action items

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

AC	τιο	n Items log	].								
Acti	Action Items Open 🔽 Child Action Item										
	Ф	Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority T	Status T	Action Completed	Supporting Documents
		<b>• T</b>								▼ T	
/	0		00162	Review drawings	⇆	Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		-
/	Ф		00166	I.		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file
/	Ф		00168	şr		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress		-
/	0		00170	Friday meeting prep		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		-

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

Add Action Item						
Subject:	(Required)					
Туре:	Action Item	-	ID:	(Auto Number)		
Status:	Not Started	-	Disciplines:			-
Percent Complete:	0	$\hat{\mathbf{v}}$	Assigned To:	Select contacts		•
Priority:	Normal	-				
Assigned:	(No Assigned Date)	-				
Due Date:	4/21/2020	-				
	Remind 2 0 da	ys before due	CC:	Select contacts		•
Action Completed:	(No Completed Date)	-	Assigned By:	Select team membe	ir	-
Keywords:						-
DESCRIPTION	DISCUSSION					
B I <u>U</u> S	Tahoma 2 (1	Opt) V A v			8 🖻 🏷 🚠	
		Send chan	ge notification ema	il SAVE	SAVE & CLOSE	CANCEL

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

Send Email		۲
To:	Carolyn Hunter 12 (Hunter Electric 12)	-
CC:	Adam Klose 12 (Jefferson Mill Associates 12)	-
	Send a copy to me	
Subject:	2018001.12 - One Oak Street 12: Action Item	
Message:	B I U S Tahoma ▼ 2(10pt) ▼ A × i= i= ■ ■ ■ ■ ₩ ∂ 6 ♥	<b>Y</b>
	A(n) Action Item has been assigned to: Bob Welder 12 (MacDougall Construction 12)	
Note:	The Project Item details and links will be added when the message is sent.	
	SEND	EL

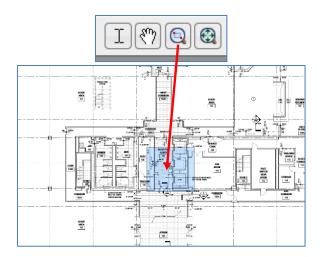
#### To use Newforma Web Viewer to markup or stamp files

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

Subject:	Walkway paving	Transmittal ID:	00272	
To:	Bob Welder 12 (MacDougall Construction 12)	Date Sent:	4/13/2020	
CC:		Via:	Info Exchange	
From:	Adam Klose 12 (Jefferson Mill Associates 12)	Due:	4/17/2020	
Submittal ID:	00 21 00-00001			
Sender ID:				
Purpose:	For Review			
	FILES *     CONTENTS *     EMAIL LOG       AD ALL CONTENTS     DOWNLOAD SELECTED	CONTENTS		
Name	<b>\</b>			1
🗌 🖻 Wa	Ikway paving			TASKS -
	Alpengrove - A208.pdf			
	Transmittal Submittal - 00 21 00-00001 (Forwar	ded) 1.pdf	D	

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

- 2. Place the cursor over any of the buttons in the toolbar for a tool tip to help you select the tool you need.
- 3. To zoom into a particular area of the file, click **Zoom Rectangle** on the toolbar. Click and drag a rectangular area to zoom into.



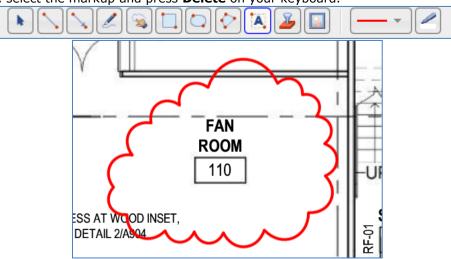
4. To zoom back out, click **Zoom to Full Page**.



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



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



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



Refer to the online help topic **Add a New Stamp** for more details on how to create a stamp.

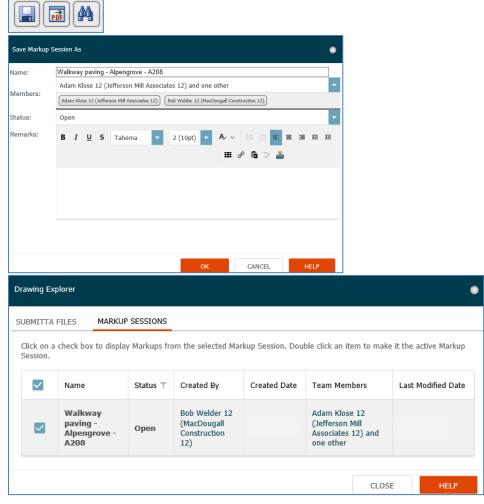
8. Stamps: After clicking Insert Stamp in the toolbar, the Select a Stamp dialog box appears. If this is the first time the stamp is being used, you need to click Browse to locate the stamp, then click Upload. After the stamp is uploaded, it appears at the top of the list of stamps in the Select a Stamp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

Select a Stamp	$\times$
Name	
statusReport_1_24_2014	×
Upload New Stamp	
	Browse
Upload	
Note: The web markup tool only supports stamps created fron Documents. Click the Help button to access example stamps a information about Word based stamps.	
ОК	Close Help

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

Export PDF Options			
Title Alpengrove - A208(Walkway paving)			
Output Options           Rasterize			
Flatten Markups			
OK CANCEL HELP			
NA	1		Save
Do you want to open or save Alpengrove - A208(Walkway paving)	.pdf from infoexchange.jma-demo.com?	Open Save 🔻	Save <u>a</u> s Save and <u>o</u> pen

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



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

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

VIEW - HELP -			
Files and Documents	Field Manager	nent Cont	ract Management
Sile Transfers	Field No	ites 🧭	Submittal
Shared Folders	📔 Daily Re	eports	RFIS
Document Control	🛐 Site Visi	its 📿	Bulletins
Project Information	Punch L	.ist 📑	Supplemental Instruction
Open Items		é	Proposal Requests
Project Email		ø	Construction Change Directives
C Action Items		٤	Change Order Proposals
20 Meeting Minutes		Q	Change Orders
28 Project Team		<b>¤</b> ⊘⊦	Contracts
Project Calendar		2	Sketches and Supplemental Drawings
Markup Sessions			
Markup Sessions All		•	
Name	Status	Related Items	Source
Wallovay paving - Alpengrove - A208	Open	\$ 📀	Alpengrove - A208.pdf (200413_Walkway paving.zip)
Kitchen information - kitchen	Rejected	\$ 0	kitchen.jpg (200331_Kitchen information.zip)
Transfer from Newforma Desktop - Apengrove - A205	Open	\$	Alpengrove - A205.pdf (200330_Transfer from Newforma Desktop.zjp)
Review #1	Closed		CentPark2_East_Sachs.jpg

#### To download files from shared folders on Info Exchange

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

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



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

nown below:			
My projects project home send ↓ view ↓ help ↓			
Shared Folders Active V & DOWNLOAD SELECTED			🖂 Send Email
Name			
Name 1	Туре	Size	Date Modified
Physics Dept - public TASKS ~			
Total items: 1 📄 🖻 Physics Dept - public TASKS 🛩	-	-	
PHYSICS RDS - Demonstration Lab.pdf	Portable Document Format	257 KB	
PHYSICS RDS - Individual Instruction Area.pdf	Portable Document Format	209 KB	
PHYSICS RDS - Lab Teaching Support Conference.pdf     O	Portable Document Format	152 KB	
PHYSICS RDS - Research Faculty Workstation.pdf	Portable Document Format	135 KB	
PHYSICS RDS - Seminar Room.pdf	Portable Document Format	190 KB	
PHYSICS RDS - Tutorial Room.pdf	Portable Document Format	117 KB	3/13/2018 9:23:28 AM
🔲 🖹 Spatial Data - Space Types.xlsx 🛛 😺	Excel	9 KB	3/13/2018 9:23:28 AM

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

#### To upload files to shared folders

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

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

hared Folders Active				
Name 1	Drag & drop files into the desired folder.			
	Name	Туре	Size Date Modified	
Physics Dept - public TASKS				
Total items: 1	Physics Dept - public TASKS			
	PHYSICS RDS - Demonstration Lab.pdf	Portable Document Format	257 KB	
	PHYSICS RDS - Individual Instruction Area.pdf	Portable Document Format	209 KB	
	PHYSICS RDS - Lab Teaching Support Conference.pdf	Portable Document Format	152 KB	
	PHYSICS RDS - Research Faculty Workstation.pdf	Portable Document Format	135 KB	
	PHYSICS RDS - Seminar Room.pdf	Portable Document Format	190 KB	
	PHYSICS RDS - Tutorial Room.pdf	Portable Document Format	117 KB	
	Spatial Data - Space Types.xlsx	Excel	9 KB	

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

Name			
	× ×	UPLOAD CANCEL 1 files (6 KB)	
Physics Dept - public	TASKS -	Name	
Total items: 1			
		Physics Dept - public	TASK
	I	🚡 bench.jpg	X Remov
		PHYSICS RDS - Demonstration Lab.pdf	
		PHYSICS RDS - Individual Instruction Area.pdf	

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

Folder Details						
Physics Dept - public	3					
Action	Т	Date		Ŷ	Member	
				T		
Published					Adam Klose 12 (Jefferson Mill Associates 12)	
Partially Downloaded					Bob Welder 12 (MacDougall Construction 12)	
Expired					Adam Klose 12 (Jefferson Mill Associates 12)	
Republished					Adam Klose 12 (Jefferson Mill Associates 12)	
Partially Downloaded					Bob Welder 12 (MacDougall Construction 12)	

#### To use Newforma ID

Newforma ID provides a single sign-on to all Newforma projects in which users have been invited to participate.

**Newforma ID** is required to log into Newforma Mobile Apps and integrated cloud storage services, as well as projects managed via Newforma Info Exchange.

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

Sign in to Newforma Info Exchange
Username
Password
Forgot password? <u>Newforma ID</u>
SIGN IN
Remember username