

Info Exchange Quick Reference Guide

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

Purpose

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

Audience

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

Key Features

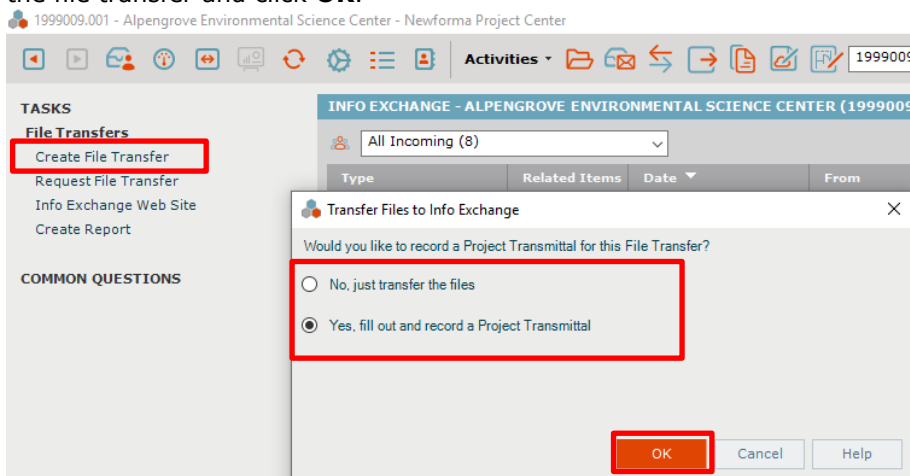
- Manage the transmittal process and share information easily, no matter what the file size.
- Log and track all published information; send notifications and manage file expiration.
- Support external team members with easy, web-based access to transmittals, submittals, RFIs and more.

Using Info Exchange

To send file transfers

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

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



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

The screenshot shows a dialog box titled "Transfer Files to a Newforma Info Exchange Server". It has a "To:" field, a "CC:" field, and a "Subject:" field with the text "Required" next to it. Below these is a "Remarks" section with a rich text editor. The text "Files to Transfer*" is at the top of the editor. The editor has a toolbar with options like Bold, Italic, Underline, Strikethrough, Font color, Background color, Bulleted list, Numbered list, Indent, Outdent, and Table. At the bottom of the dialog are buttons for "Save Draft", "Transfer", "Cancel", and "Help".

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

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

The screenshot shows a dialog box titled "Transfer to Info Exchange Options". It has two main sections: "File Transfer Options" and "Notification Options". In the "File Transfer Options" section, there are four radio buttons: "Only the specified recipients" (selected), "Specified recipients and their fellow company members", "All Project Team members", and "Public access". There are also two checked checkboxes: "Allow recipients to download partial contents" and "Remove content from Info Exchange after 30 days". An "Edit..." button is highlighted with a red box. In the "Notification Options" section, there are three unchecked checkboxes: "Hide recipient list", "Require Info Exchange login to download (useful for sensitive information)", and "Send notifications and reminders". At the bottom of the dialog are buttons for "OK", "Cancel", and "Help".

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

To manage file transfers

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

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

The screenshot shows the 'INFO EXCHANGE - ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.001)' interface. On the left, the 'TASKS' panel is visible, with 'Change Log' highlighted under the 'File Transfers' section. The main area displays a list of transfers. The selected transfer is 'Outgoing Transfer with...' dated 3/25/2020 11:39:48 AM, from Adam Klose (Jefferson...) to aklose24@jmc. Below this, the 'Change Log' tab is active, showing a table of events:

Date	Event Type	By	Detail
3/25/2020 11:39:48 AM	Created		(Newforma)
3/25/2020 11:39:59 AM	Background upload...		(Newforma)
3/25/2020 11:40:19 AM	Background upload...		(Newforma)

To add external users to the Project Team

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

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

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

The screenshot shows the 'Project Team' activity center. The 'Add Team Members' option is highlighted in the left-hand 'Tasks' panel. A dropdown menu is open, showing 'From Contacts' as the selected option. Other options in the dropdown include 'From Company' and 'From Company'.

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

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

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

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

To receive file transfers

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

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

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

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

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