
Newforma Cloud Quick Reference Guide

Overview

Newforma Cloud is a project website that facilitates the access of project files, including search, share, download and upload, filing of project emails and creating and editing action items. Newforma Cloud does not require VPN access and can be used through a web browser or the Newforma Cloud app.

Tasks covered

- **Logging in to Newforma Cloud**
- **Searching Project Files**
- **Downloading files**
- **Uploading files**
- **Sharing files from Newforma Cloud**
- **Creating Folders in Project Files**
- **Create and editing Action Items**
- **Filing emails to a Project**
- **Using the Newforma Cloud Mobile App**

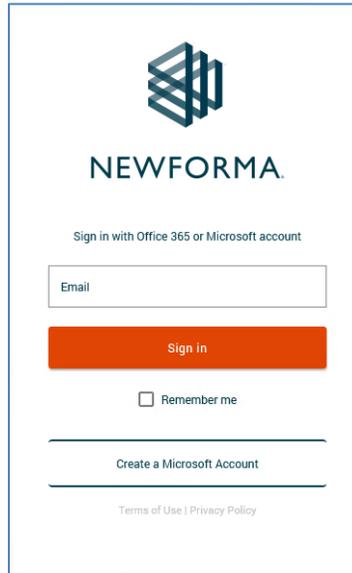
Using Newforma Cloud

You can access Newforma Cloud in the following ways:

- Newforma Cloud website: <https://newforma.cloud>
- Newforma Cloud mobile app, downloaded from Google Play Store or iTunes

To log into Newforma Cloud

Log in with your Office 365 credentials:

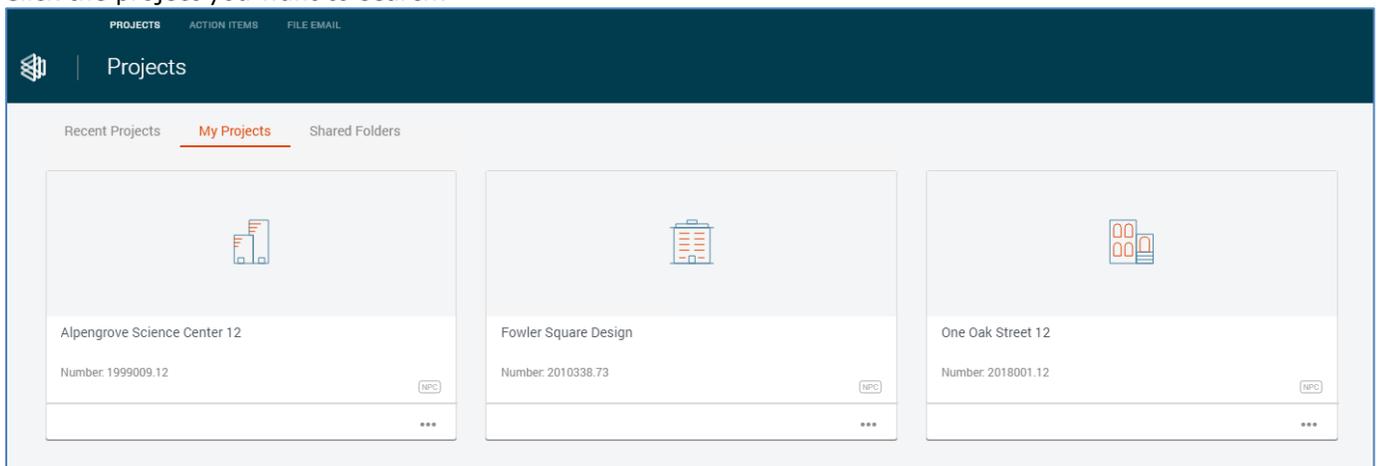


The login screen features the Newforma logo at the top, followed by the text "NEWFORMA.". Below this is the instruction "Sign in with Office 365 or Microsoft account". A text input field labeled "Email" is positioned above an orange "Sign in" button. A "Remember me" checkbox is located below the button. A horizontal line separates the login section from a "Create a Microsoft Account" link. At the bottom, there are links for "Terms of Use" and "Privacy Policy".

To search project files

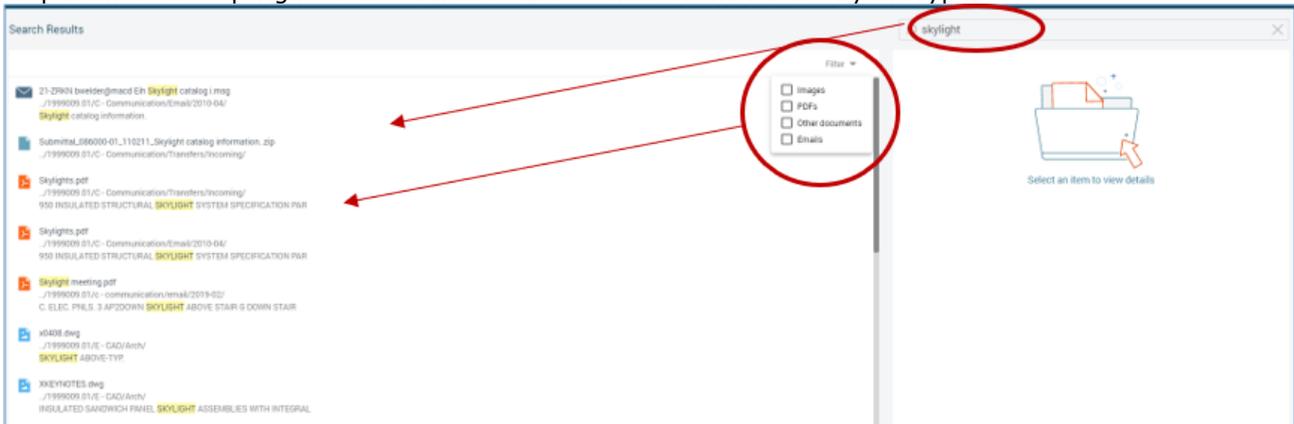
Once you have completed your initial login, you can search Project Files.

1. Click the project you want to search:

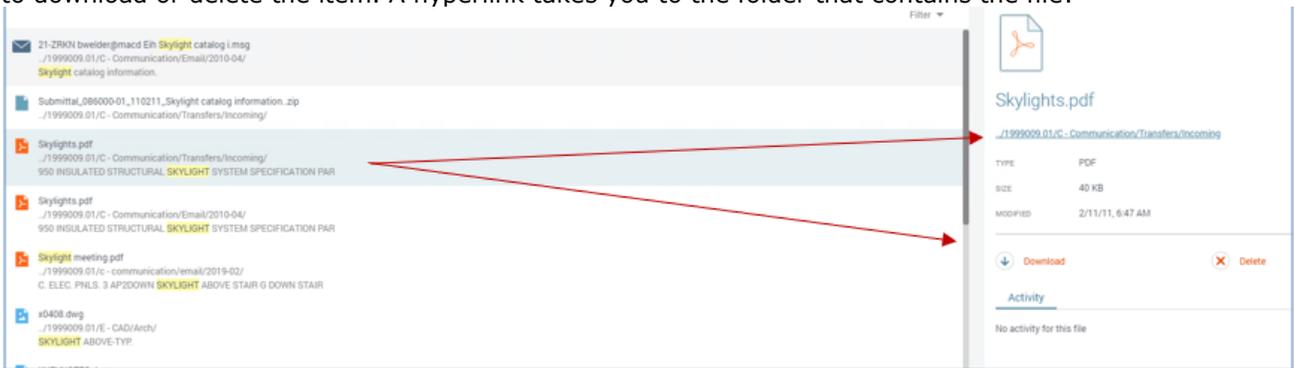


The dashboard shows a navigation bar with "PROJECTS", "ACTION ITEMS", and "FILE EMAIL". The main header is "Projects". Below this are tabs for "Recent Projects", "My Projects" (which is selected), and "Shared Folders". Three project cards are displayed, each with a building icon, a title, a number, and an "NPC" tag. The first card is "Alpengrove Science Center 12" with number "1999009.12". The second is "Fowler Square Design" with number "2010338.73". The third is "One Oak Street 12" with number "2018001.12". Each card has a three-dot menu icon at the bottom right.

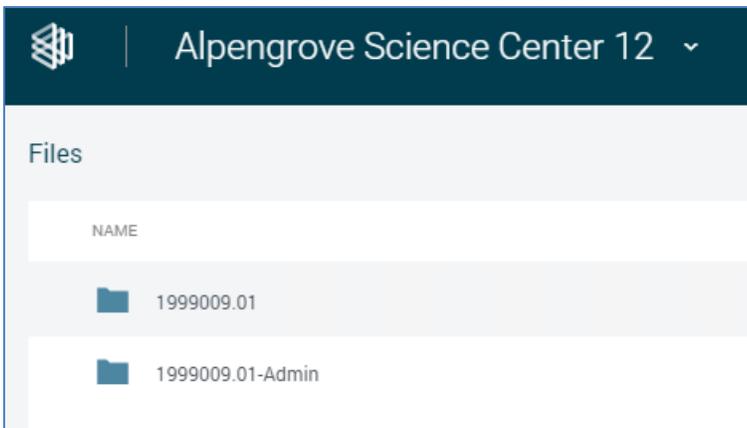
2. Enter your search term and press Enter. The search results appear on the left of the page. Click the **Filter** dropdown at the top-right of the search results to narrow the results by file type:



3. Highlight a result to view item details in the right panel. Depending on your permissions, you may have the option to download or delete the item. A hyperlink takes you to the folder that contains the file:

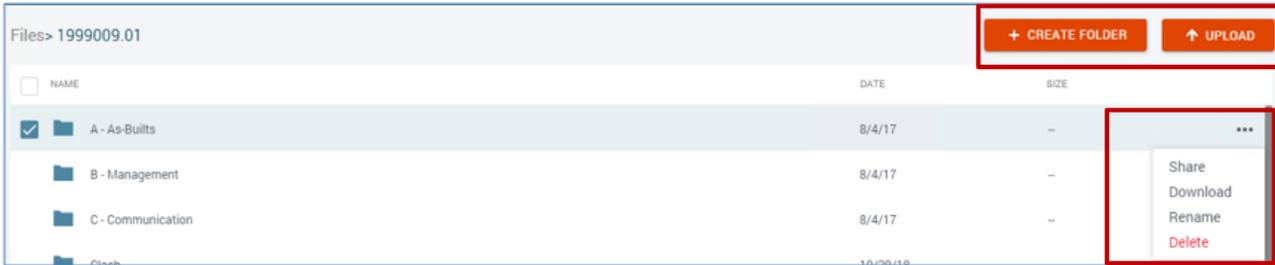


4. Click on a folder to "drill down" into the folder structure:



To work with folders and files

Click on the ellipsis to the right of a folder to access Share, Download, Rename and Delete options. You can also create a new folder and upload files to the folder:



Following is a description of each of the options.

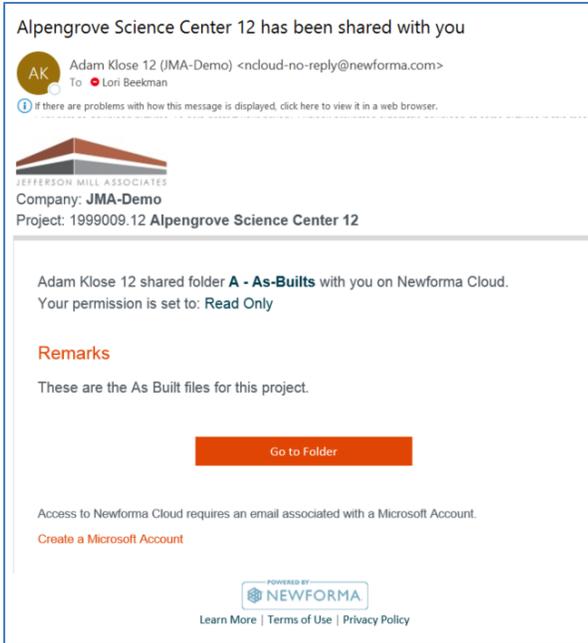
Share a folder with External Users

Note: The Share option is currently in Early Adopter and may not be available. If you would like to be considered for Early Adopter access of this feature, please reach out to your Account Manager.

1. Click **Share** to share a file or folder with external users:

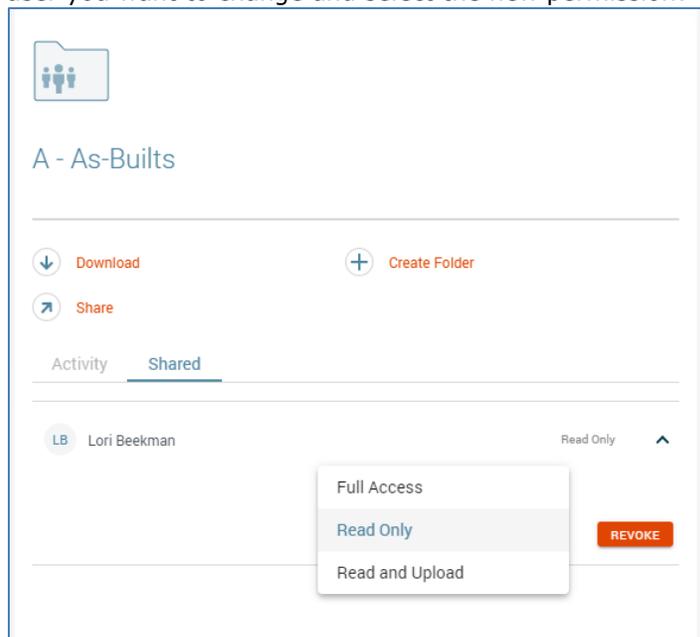
2. Type a name in the **Share With** field. A list of matching names and groups from the Project Team appears. You can also enter an email address directly.
3. Set share permissions from the **Permission** dropdown list. Options are Read Only, Read and Upload or Full Access.
4. Enter any remarks you want included with the share notification in the **Remarks** field.

5. Click **Share** to share the file or folder. The share notification email is sent to all selected users:



6. Select a folder to view Share activity in the **Details panel** on the right side of the page.

- To change share permissions, click the **Shared tab** in the panel. Click the permissions dropdown for the user you want to change and select the new permission:



- To revoke the share, click the **Revoke** button for the user.

Download folder contents

Click **Download** next to a folder to download its entire contents. Click **Download** for an individual file to only download that file:



Rename a folder

Click **Rename** to change the name of a file or folder:

Rename Folder

Folder Name *

CANCEL
RENAME

Delete a folder

Delete a file or folder. You are asked to verify the deletion before continuing:

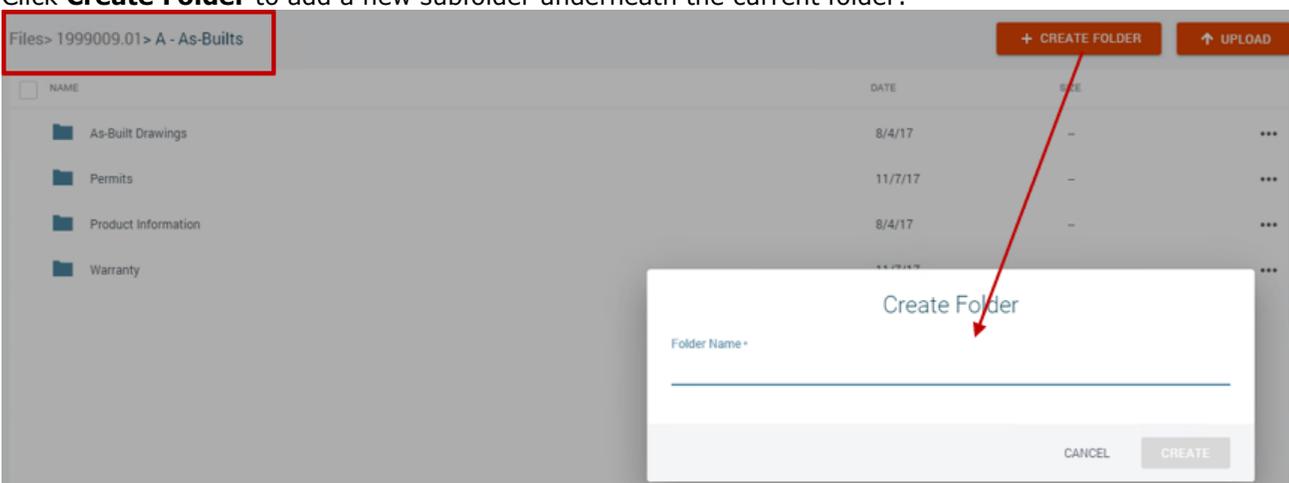
Delete File

Are you sure you want to delete Alpengrove - A001.pdf?

CANCEL
DELETE

Create a folder

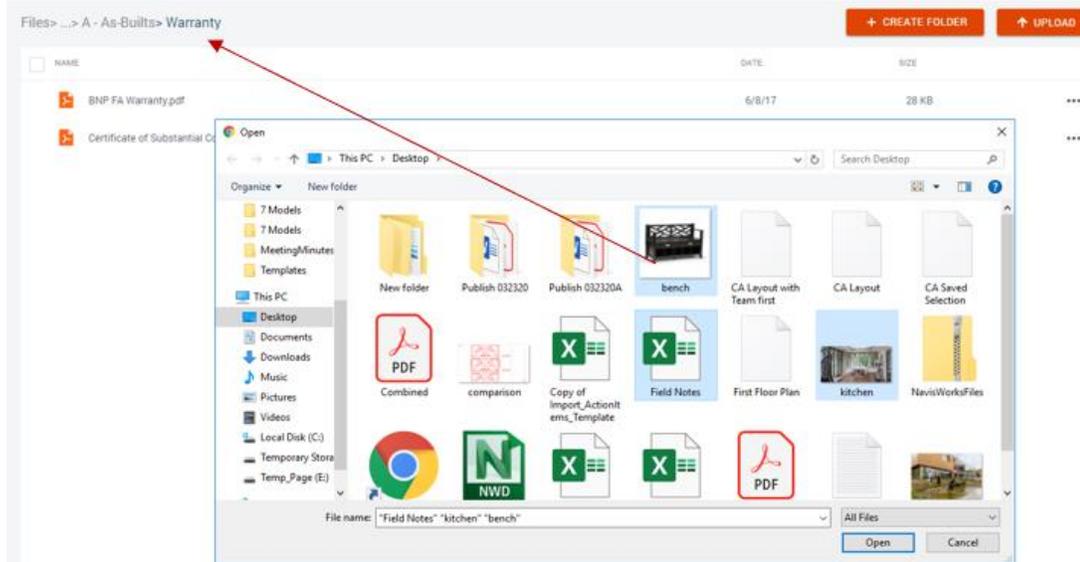
Click **Create Folder** to add a new subfolder underneath the current folder:



Upload files to a folder

Click **Upload** to upload files to the current folder. You can select multiple files to upload at one time.

Note: You can also drag and drop files to a Newforma Cloud folder.



To create and edit Action Items

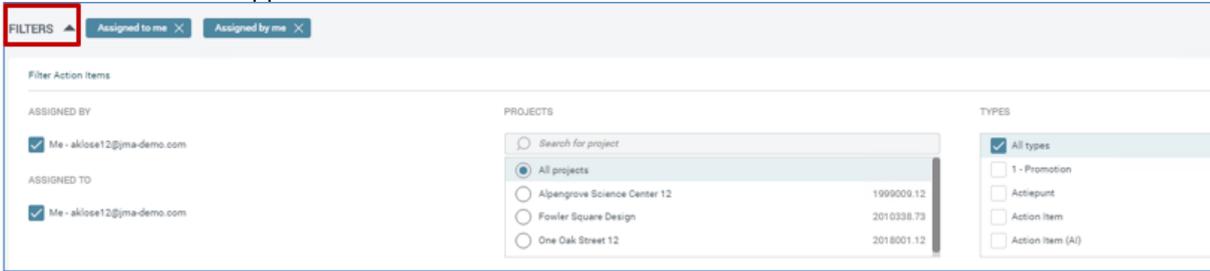
You can use Newforma Cloud to create and edit action items that are assigned to you or by you that are not in a completed state.

1. Click **Action Items** in the top menu bar to view the **Action Items** page:

The screenshot shows the 'Action Items' page in the Newforma Cloud interface. The top navigation bar includes 'PROJECTS', 'ACTION ITEMS', and 'FILE EMAIL'. The page title is 'Action Items'. Below the title, there are filters for 'Assigned to me' and 'Assigned by me', and a '+ CREATE ACTION ITEM' button. The main content is a table with the following columns: TITLE, TYPE, COMPLETED, DUE DATE, and DAYS LEFT. The table lists several action items, all with a completion status of 0% and negative days left, indicating they are overdue.

TITLE	TYPE	COMPLETED	DUE DATE	DAYS LEFT
Action Item for: 00028 - Rebar in Elevator Pit conflicts with drainage lines One Oak Street 12	Action Item	0%	7/29/19	-249 days
Review drawings One Oak Street 12	Action Item	0%	8/14/19	-233 days
Hole in wall One Oak Street 12	Action Item	0%	9/23/19	-193 days
Order wallpaper One Oak Street 12	Action Item	0%	9/30/19	-186 days
Friday meeting prep One Oak Street 12	Action Item	0%	10/28/19	-158 days
The TOWER!	Action Item	0%	10/28/19	-158 days

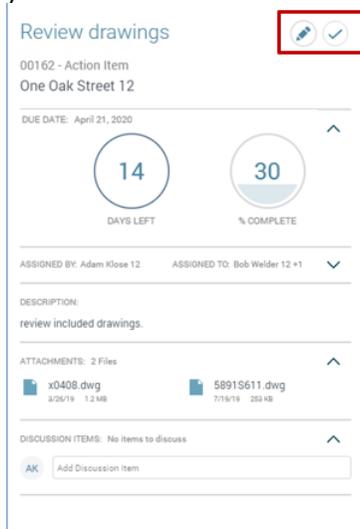
2. Click **Filters** in the upper-left corner of the Action Items list to further narrow the results:



Filter options include:

- Assigned to Me
- Assigned by Me
- Project
- Type

3. Select an action item in the list to view its details in the **Details** panel. Click the **pencil icon** at the top of the panel to edit the action item. Click the **checkmark icon** to mark the action item as Closed and remove it from your list:



- When you click the pencil icon, the **Edit Action Item** dialog box appears. In addition to changing attributes, you can attach files to the action item. Click **Add From Project** to select project files, or add files from your device by clicking **Choose Files** or dragging and dropping the files to the action item:

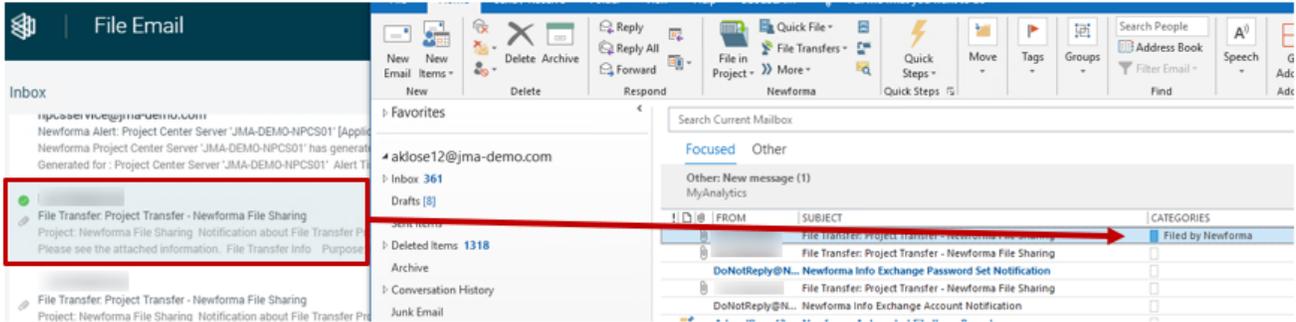
To file emails to a project

In addition to project files and action items, Newforma Cloud also allows you to file emails to projects while on the go.

- Click **File Emails** in the top menu bar. Emails currently in your Inbox appear:

- Highlight an email and click **File in Project**:

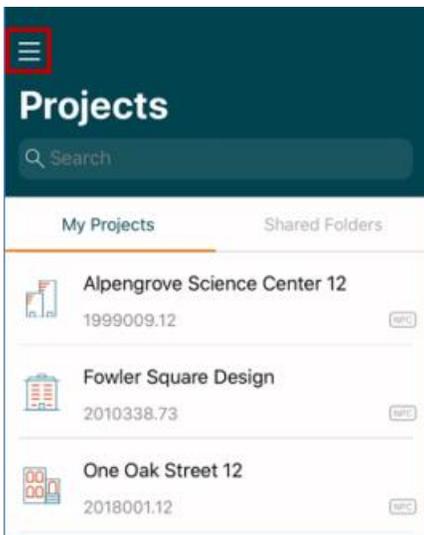
3. Select the desired project from the list. Once the email is filed, a checkmark appears next to the email. The email remains in your Inbox and a copy is filed to the project. In Outlook, the email is tagged with the **Filed By Newforma** category:



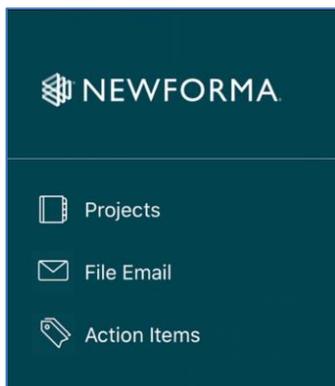
Using the Newforma Cloud App

In addition to the Newforma Cloud website, you can download the Newforma Cloud mobile app for iOS and Android. To get started, log in with your Office 365 credentials.

Once you login, the **Projects** screen appears:

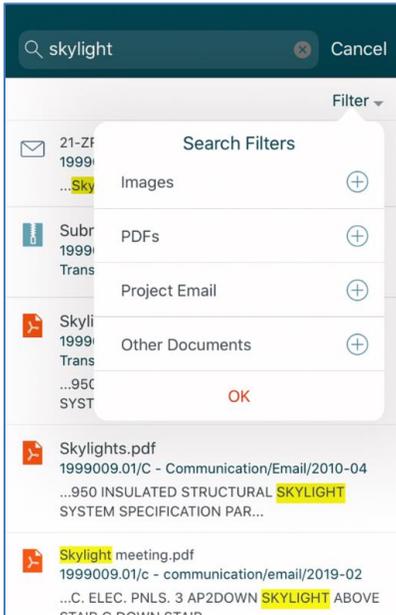


Tap the hamburger icon in the upper left to file emails and access action items:

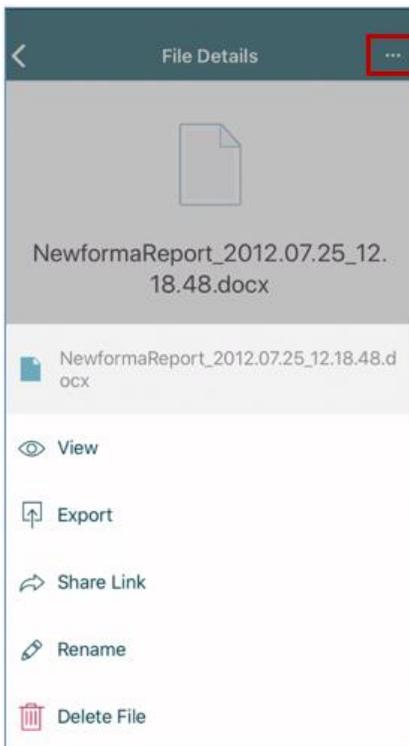


To work with folders and files

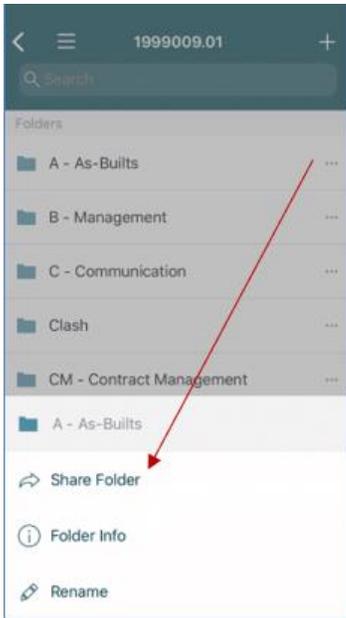
The same search and filter options are available as on the website. Tap **Filter** in the upper right of the screen to access the filters:



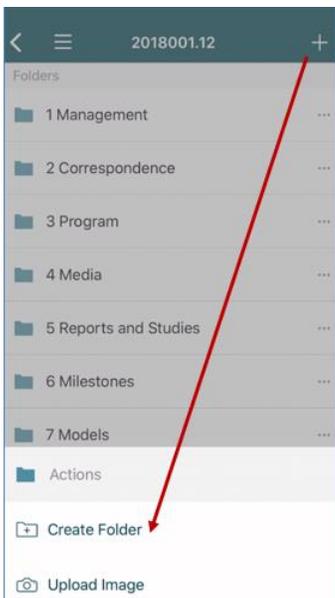
Tap on a file to view its details. Tap on the ellipsis at the top of the **File Details** screen to view, export, share, rename or delete the file:



Tap the ellipsis to the right of a folder to access the **Share** and **Rename** options:

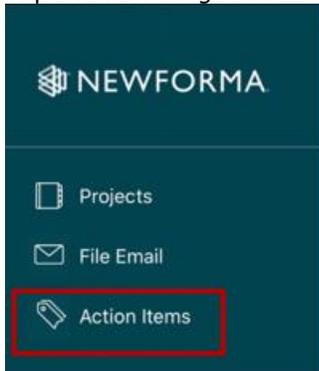


Tap the plus sign in the upper-right corner to access the **Create Folder** and **Upload** options:

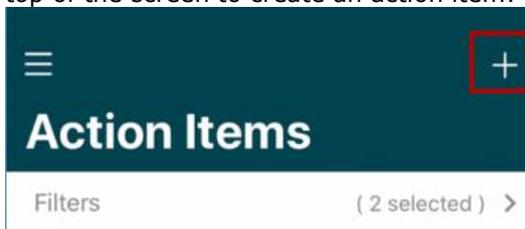


To create and edit Action Items

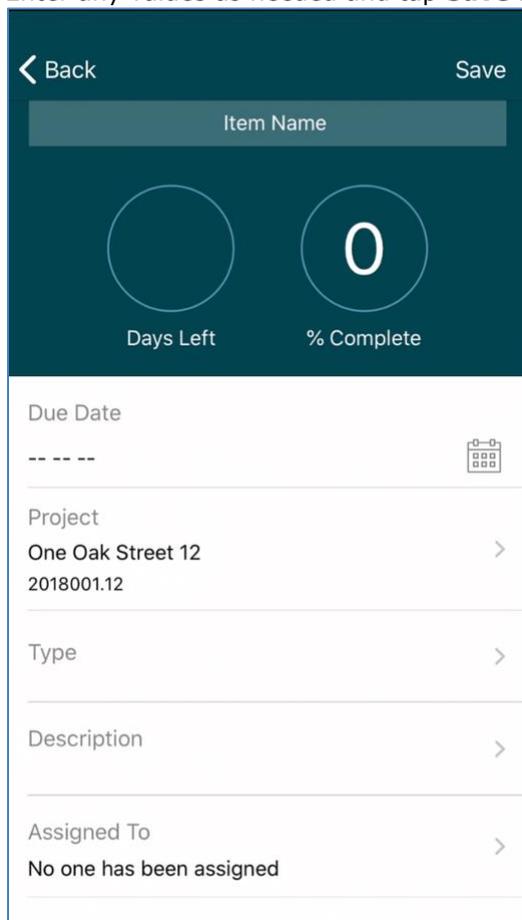
1. Tap the hamburger button on the **Projects** screen and tap **Action Items**:



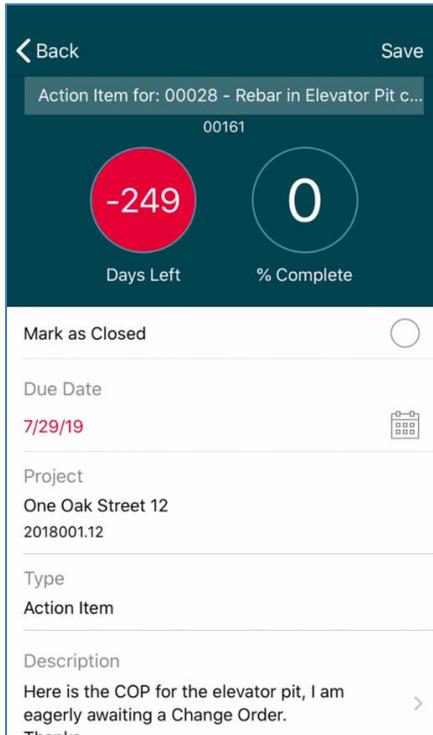
2. As with the Newforma Cloud website, you can apply filters to the list of action items. Tap the plus sign at the top of the screen to create an action item:



3. Enter any values as needed and tap **Save** in the top right corner:

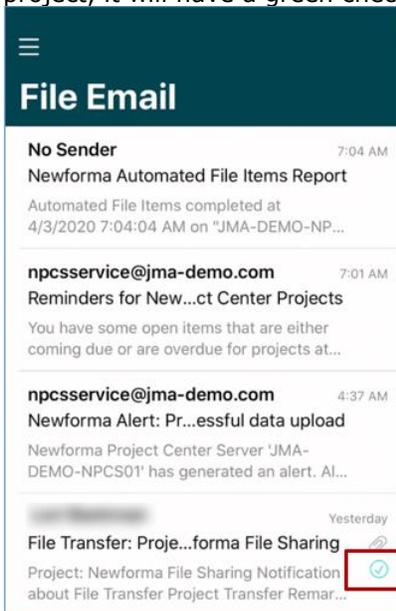
A screenshot of the 'Action Item' edit form in the mobile app. The form has a dark teal header with a back arrow and 'Back' text on the left, and 'Save' text on the right. Below the header is a text input field for 'Item Name'. Underneath are two circular gauges: 'Days Left' and '% Complete' with a '0' in the center. Below the gauges is a list of fields: 'Due Date' with a calendar icon, 'Project' with the value 'One Oak Street 12' and '2018001.12', 'Type', 'Description', and 'Assigned To' with the value 'No one has been assigned'. Each field has a right-pointing chevron icon.

- To edit an action item, tap it in the list, then tap **Edit** in the top right corner. In addition to changing the action item name, you can modify the Due Date, Description, and Assignment. You can also mark the action item as closed:

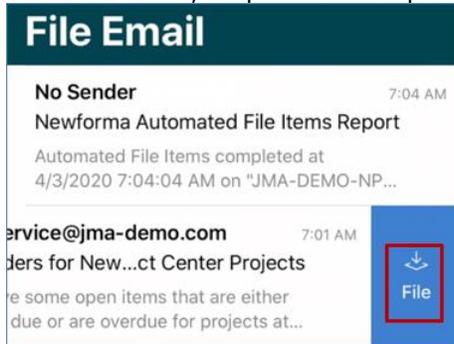


To file emails to a project

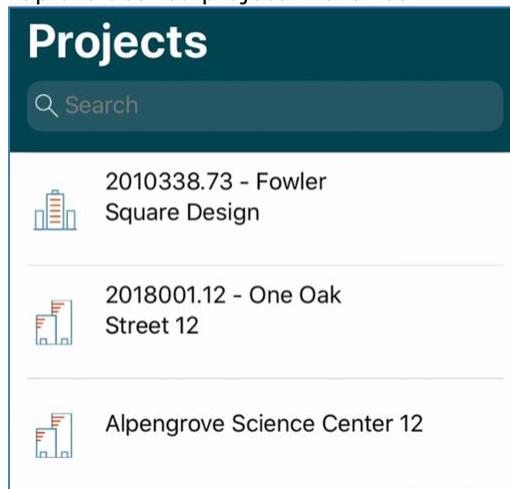
- Tap the hamburger button on the **Projects** screen and tap **File Email**.
- As with the Newforma Cloud website, emails in your Inbox appear. If the email has already been filed to a project, it will have a green checkmark next to it:



3. To file an email, swipe left and tap **File**:



4. Tap the desired project in the list:



5. Once the email is filed, a checkmark appears next to the email. The email remains in your Inbox and a copy is filed to the project. Indicators also appear in the Newforma Cloud website and Outlook:

