NEWFORMA

Newforma Procore Integration: FAQ

Frequently Asked Questions

Getting Started

Question	Answers
What version of Newforma Project Center is required?	The Procore connector works with 12.2.2 or later with NewformaLink and N-API installed.
What level of Newforma licensing required?	The Procore Connector requires an Enterprise license.
Does the Procore Connector require a new license key?	Yes, without this, the option to enable the connector will be disabled in Project Settings.
Why does the Procore Connector require an extra license? Is there a charge?	To enable the connector, an API Service account is required with NCM role that has Read/Write permissions to the Project Folder. There is no fee for this license. **Important**: This account cannot be the Azure AD Service account.
Is this connector secure?	Yes, the connector uses encrypted communications with trusted project partners.
What or who is Ryvit?	Ryvit is a company Newforma has partnered with to build and support an array of different connectors. Ryvit's software communicates the information between Procore and Newforma.
What is involved from the contractor side?	There is nothing required from the contractor for setting up the connection. There are some best practices that they should follow to ensure a smooth experience for both teams.
How should the Contractor configure their Submittals and RFIs for best results?	The Connector requires the user who originally linked the Newforma and Procore projects to be in the "Ball in Court". If that user is not added as a reviewer, and they are not shown in the "Ball in Court", then the item will not be transferred to Newforma. It is also recommended that the Contractor only add a single approver to an item to prevent bypassing the routing and logging in Newforma.
Can a submittal be sent to a group email address?	Yes, many firms have a group email address set up for Contract Management. This is a great way to ensure that someone in the firm receives the Submittal or RFI.

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What about Submittals or RFIs that have already been processed before the connector was setup?	Items cannot be returned to Procore via the Procore Connector unless they originally came in through the Connector. This is because the Connector has no reliable method to associate the returned item's response to the original item in Procore.
What if a Submittal or RFI is re-opened or closed multiple times?	The Connector does not support re-opening items. It is best to create a new submittal or RFI. If this is not an option, the process will need to be done manually.
Can I setup multiple projects at once for the Connector?	No, each project must be linked individually to a Procore project.
How does the system translate the actions for the final response on the Submittal?	When setting up the project to connect to Procore, there is an option to map the response Actions from Newforma with the Actions in Procore.
How many Newforma projects can be connected to a Procore project?	Projects have a one to one relationship. A Newforma project can only be linked to one Procore project.
What if there is more than one Newforma Project Center company on my project?	It is important that the lead design firm be the only company connected to the Procore project and that they are the only team members added as "approvers" in Procore.
Does the Connector work with 'Newforma to Newforma'?	Yes, a submittal received via the Connector can be forwarded to reviewers via Newforma to Newforma.
Why is Procore not available in the Send Via menu?	This is most likely because the item was not received via Procore.
I already have a Procore option in Send Via, does this mean I have the connector?	If you already have an option to send to Procore in the Send Via menu, it was most likely set up as an Electronic Transfer method in Project Settings. Remove or rename this option from the product to avoid confusion with the new Procore option that will appear for the connector.
How long does it take for a submittal to appear in the other system?	It can take up to 30 minutes for items to move between systems.
How do notifications work between the systems?	An incoming notification will come in from Procore and Newforma for incoming. The incoming notification from Procore provides a link to the Transmittal to download (see next FAQ) and the notification from Newforma provides a link to the Submittal within Project Center.
Does the transmittal come in from Procore?	Procore does not support receiving the transmittal from Procore through their API at this time.

Question	Answers
Why is the transmittal sent back to Procore? Is there a way to turn this off?	The Transmittal is the way to ensure all the details are sent back to the contractor as Procore does not support some information. For example: Desc of Contents contains the action for each item sent back. There is not a way to disable sending the Transmittal file.
Why isn't due date coming in from Procore?	The Due Date field is calculated through the Project Setting based on a contractual agreement. If the Contractor has a different date, they are looking for the Submittal or RFI to be returned earlier, the best practice is to have them put a note in the remarks if needed before standard contract date.
Will the Procore submittals appear as expected submittals?	Receiving a Submittal as an Expected Submittal is not supported. However, you can create expected Submittals an map the incoming Submittal to the expected Submittal.
Does the Procore connection support using the Add Similar Submittal task to create an additional Submittal?	No, the Submittal must come in from Procore. You can add a similar Submittal, but only as an Expected Submittal.
Does the connector work with Newforma ConstructEx?	No, this connector is only for Newforma Project Center.
When will you connect to other contractor platforms?	Newforma is working on connecting several other platforms but there is nothing to announce currently.