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.

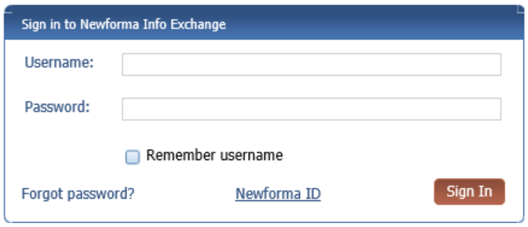
> *The link included in the invitation email can only be used once.*

To receive a file transfer

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

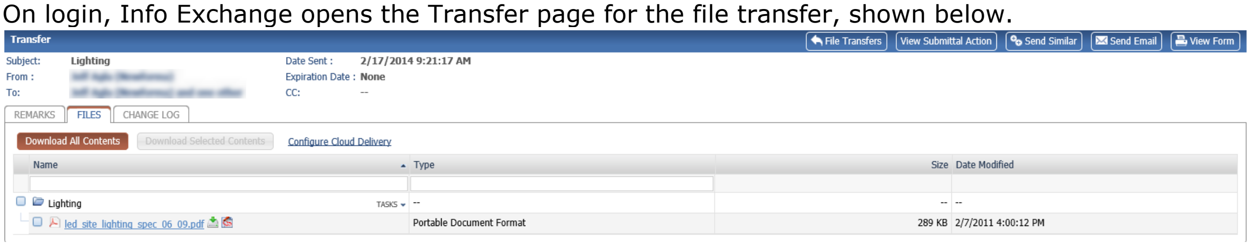
1. You receive an email notifying you when someone has posted a file transfer for you. The notification email includes two links with options for accessing the files. Select the first link to download and save the files; select the second link to log into the Info Exchange website and download the files.

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



*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.



4. Select **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 select **Download Selected Contents**.

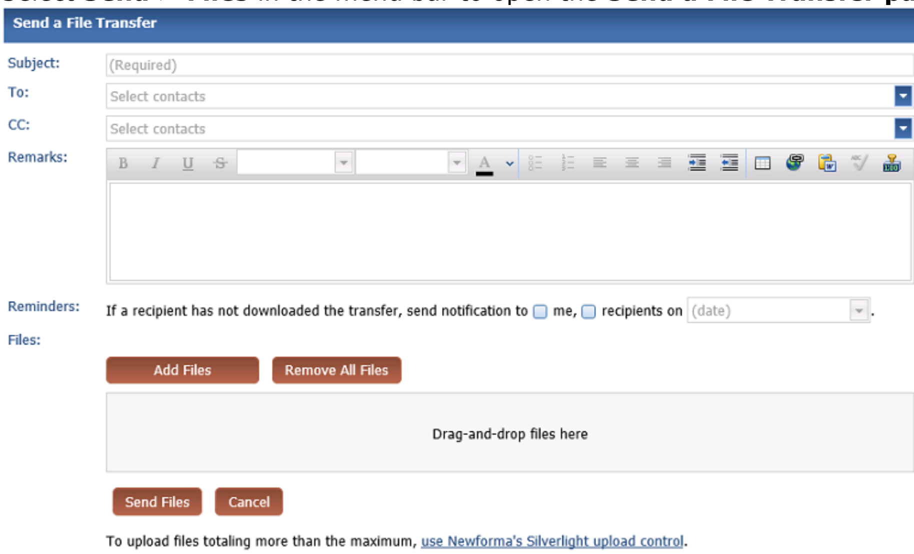
***Download Selected Contents** is only available if the original file transfer was set to allow partial downloads.*

5. Once you select one of the download command buttons, you are prompted to either open the files or save them. Select **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.

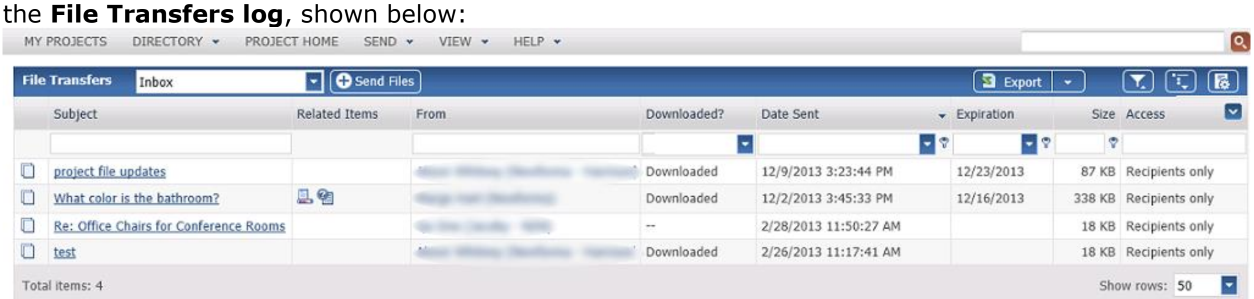
1. Log into Info Exchange and select the appropriate project.
2. Select **Send > Files** in the menu bar to open the **Send a File Transfer page**, shown below:



3. Fill in the transmittal information, including selecting recipients for the file transfer from the project team members list.
4. **Select 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. Select **Send Files** to send the file transfer.
6. To track your file transfers, select **View > Files and Documents > File Transfers** from the menu bar to open the **File Transfers log**, shown below:



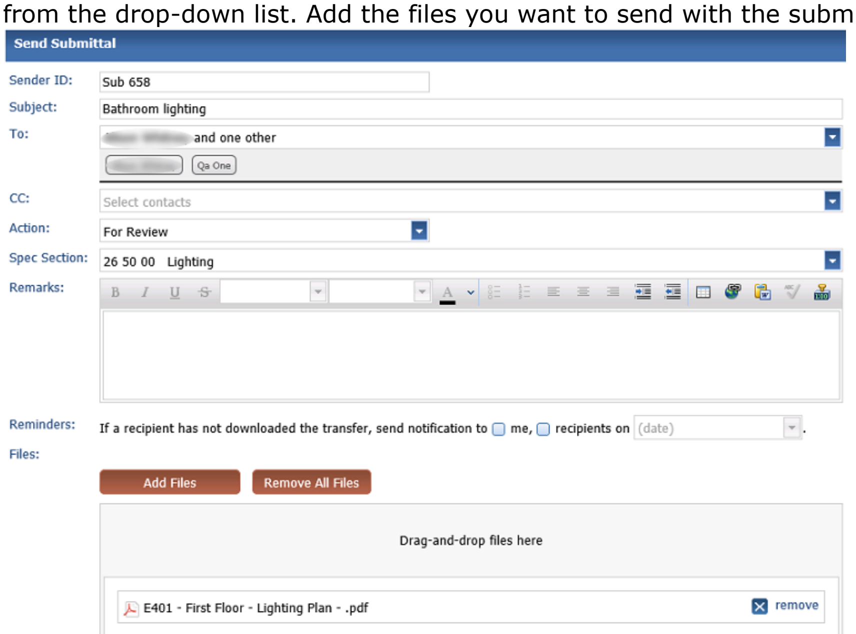
7. Select the **Subject** of the transfer to open the **Transfer page**, shown below:

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

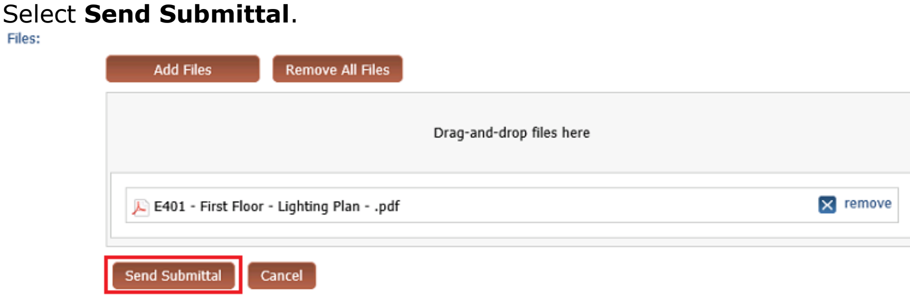
To send an RFI, Submittal or Change Order Proposal via Info Exchange

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**, select **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.



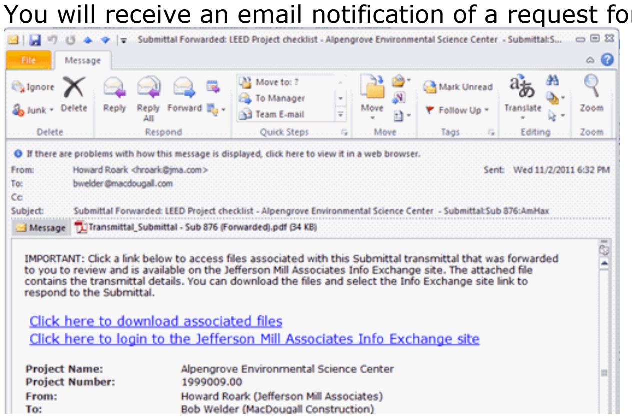
3. Select **Send Submittal**.



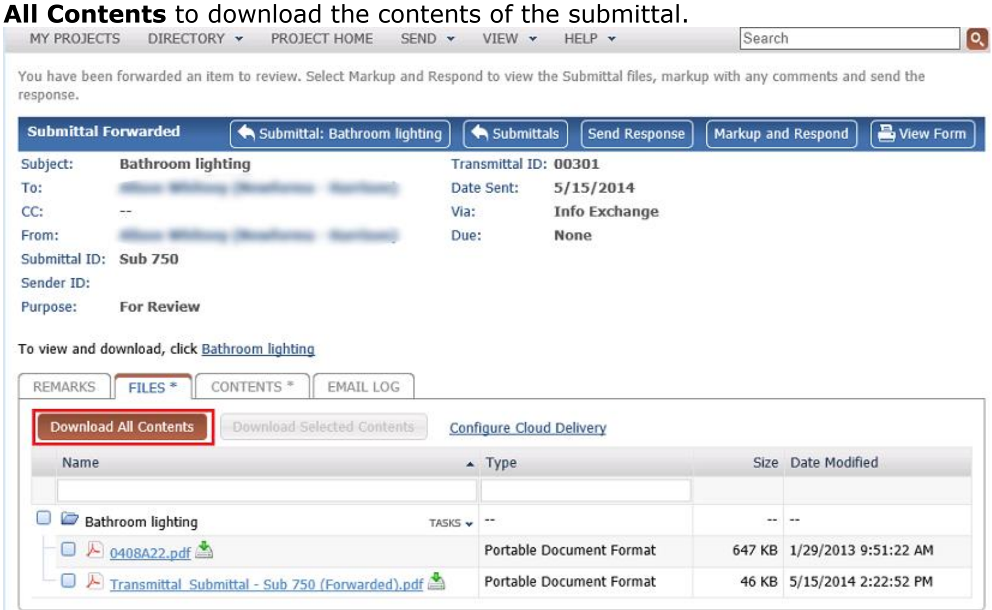
To respond to a forwarded submittal

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

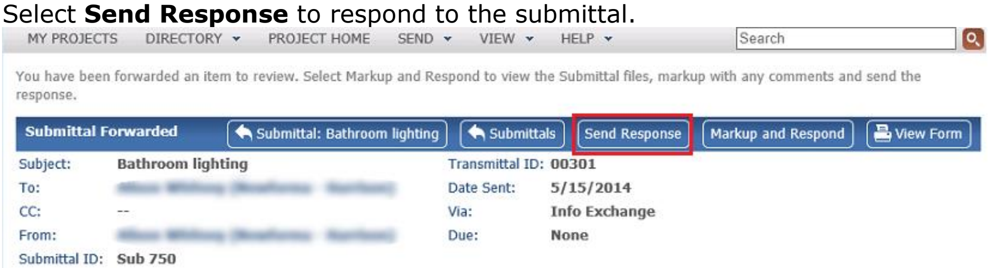
1. You will receive an email notification of a request for review. Follow the link in the email to log into Info Exchange.



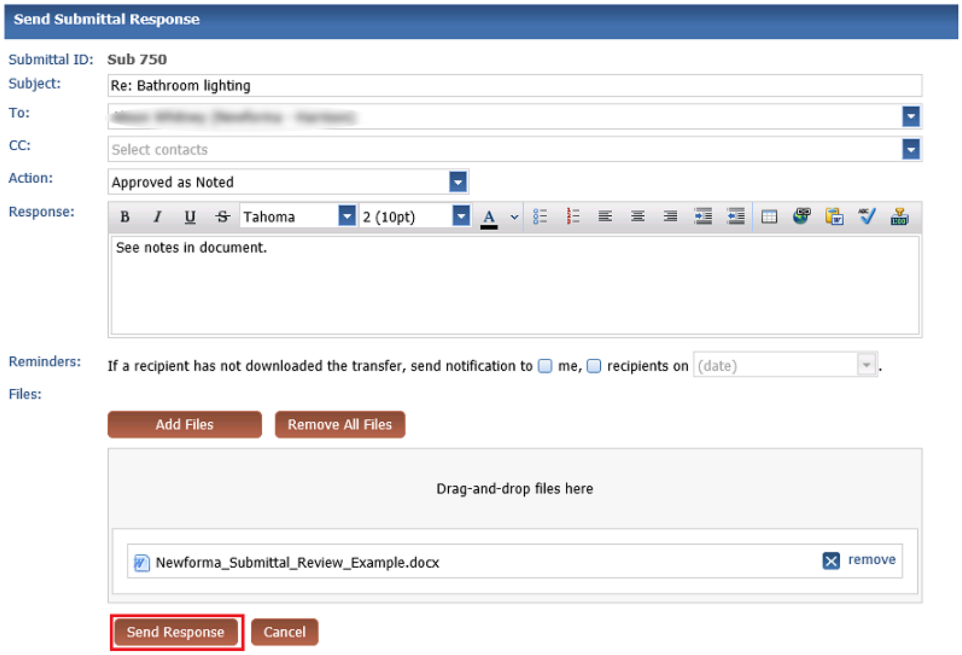
2. Log into the site. You are directed to the Submittal Forwarded page. Select the **Files** tab, then select **Download All Contents** to download the contents of the submittal.



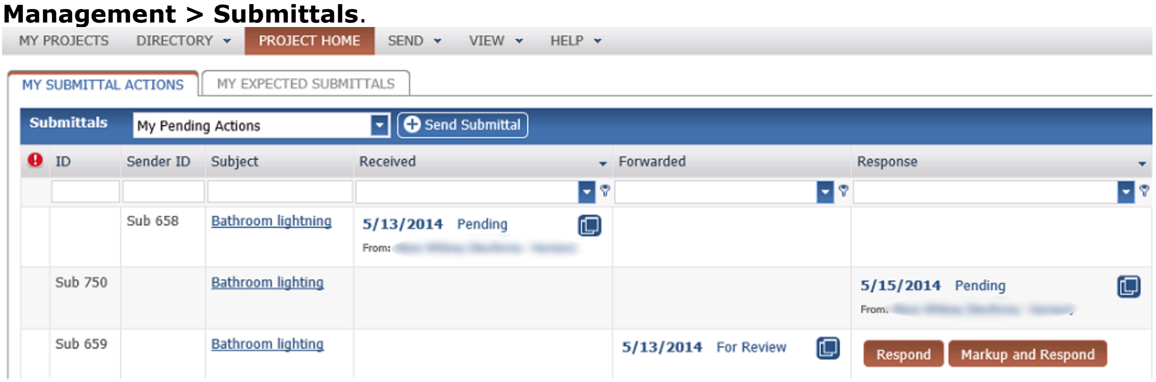
3. Select **Send Response** to respond to the submittal.



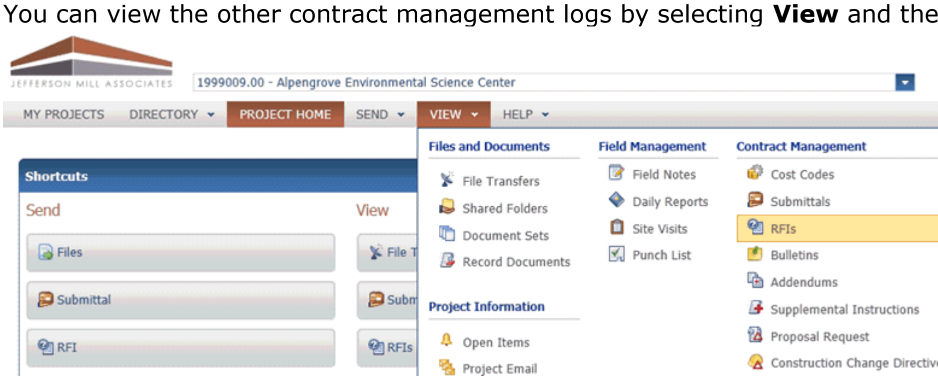
4. Complete the **Send Submittal Response page** and select **Send Response**.



5. You can track all your submittal activity in the corresponding log on Info Exchange. Select **View > Contract Management > Submittals**.



6. You can view the other contract management logs by selecting **View** and then the appropriate log.

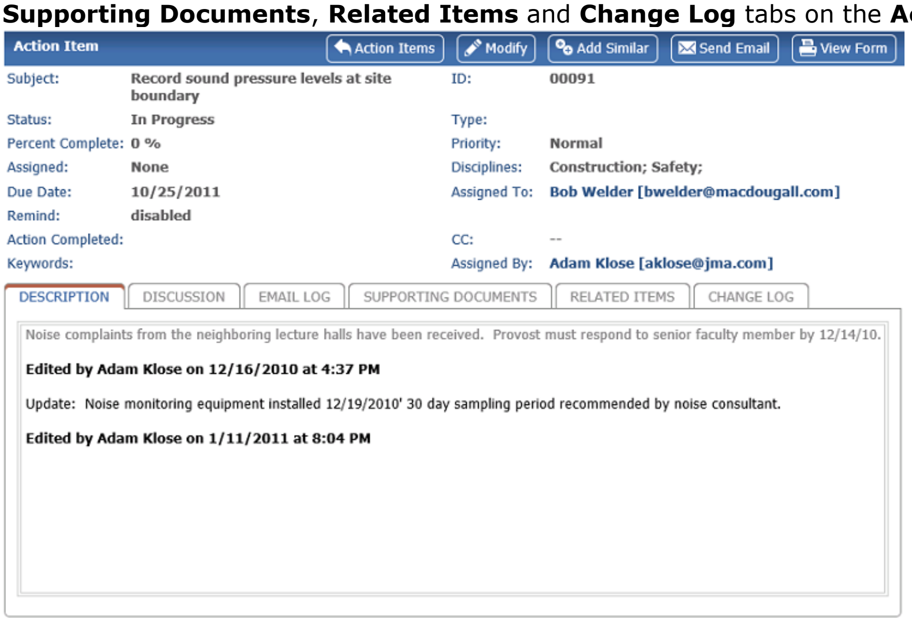


To view and update action items

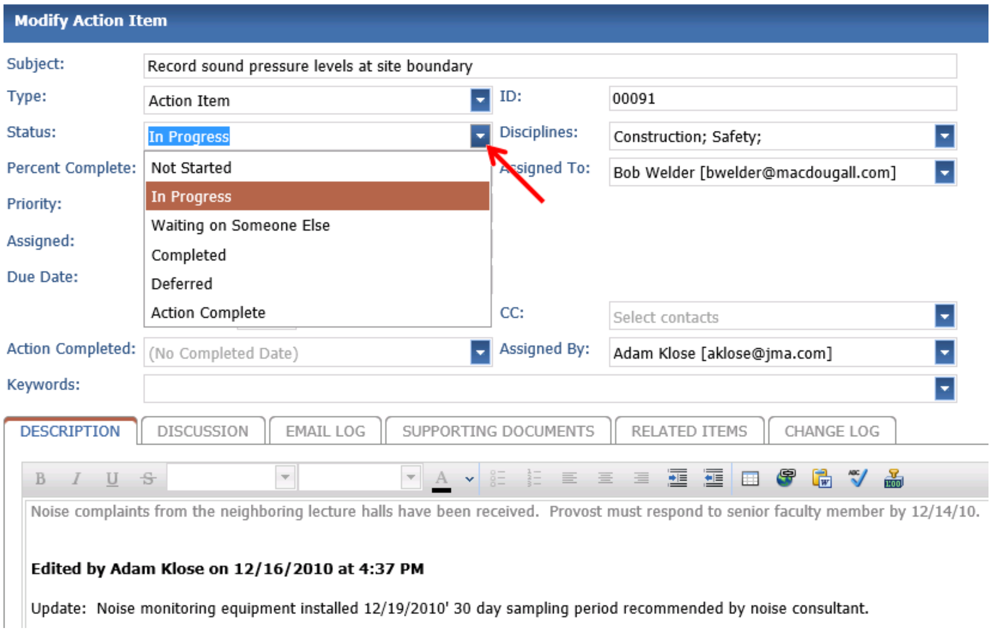
Action items can be used to track project to-do items. For example, a project manager or other person can assign you a list of things you need to do, perhaps with due dates. If you have access to action items, you can view them and possibly update them from Info Exchange.

1. 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 select **View > Project Information > Action Items** from the menu bar.
2. Select the action item **Subject** in the **Action Items log** to view it.

3. View the main information and see additional information on the **Description**, **Discussion**, **Email Log**, **Supporting Documents**, **Related Items** and **Change Log** tabs on the **Action Item page**.

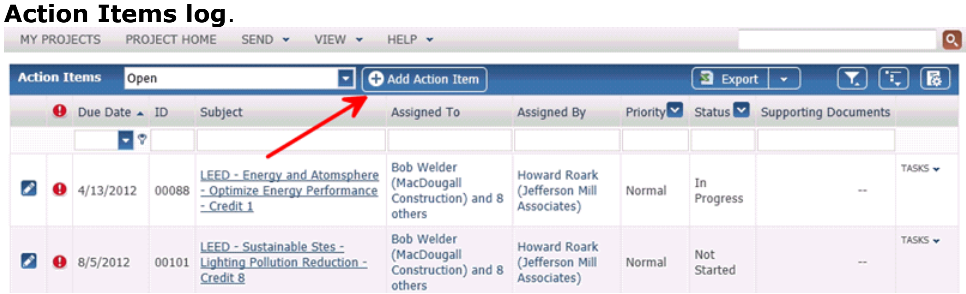


4. You may have rights to edit action items. To update an action item, select **Modify** to open the **Modify Action Item page**. For example, you could change the status or add notes in the **Description** field regarding progress on the item. Select **Save and Close** when done.

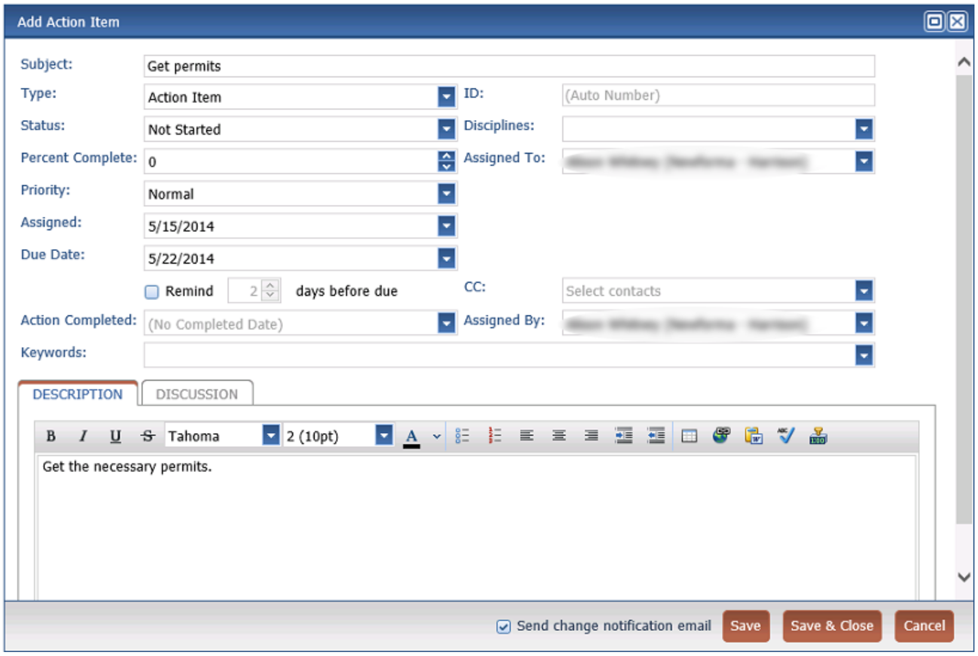


To create action items

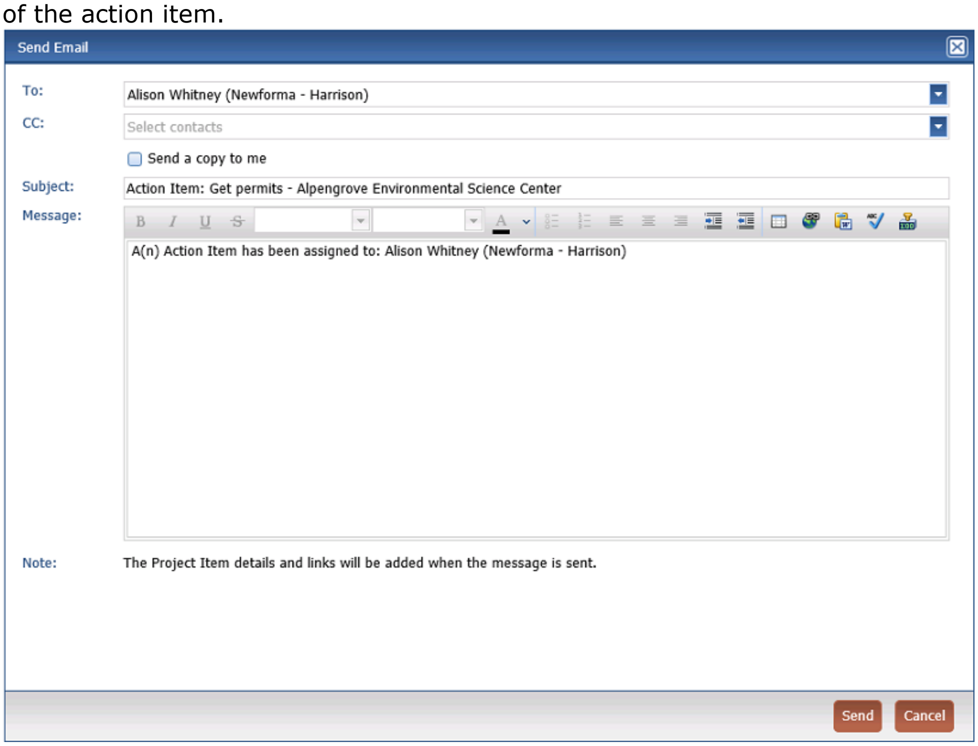
1. Based on your permissions, you may have the ability to add new action items. Select **Add Action Item** in the **Action Items log**.



2. 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. Select **Save and Close** when done.



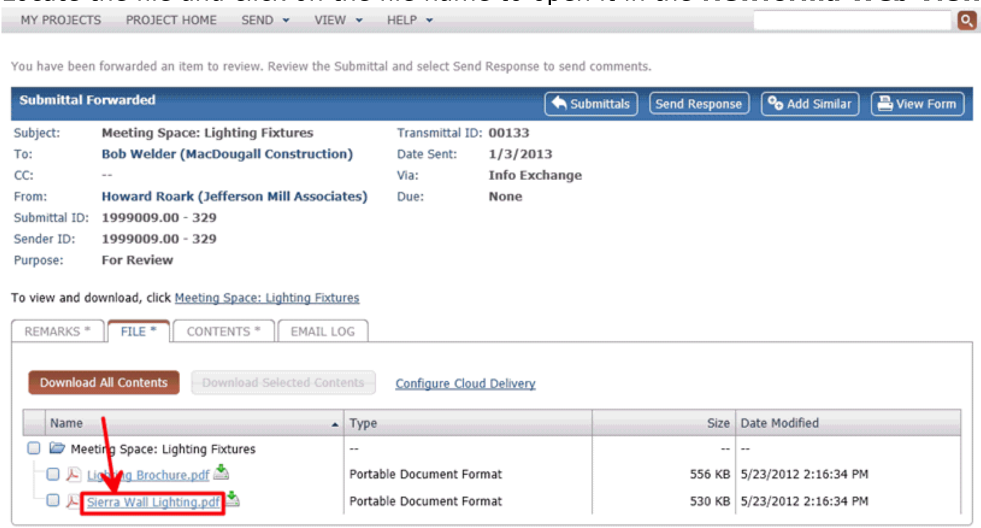
3. If you selected **Send Change Notification Email**, the Send Email dialog box appears. Add recipients and make other changes as needed. Select **Send** when ready. People in the **To:** and **CC:** fields receive an email notification of the action item.



To use Newforma Web Viewer to markup or stamp files

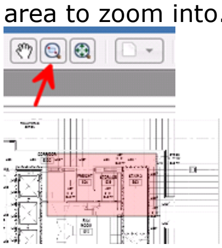
You can use the Newforma Web Viewer to view, stamp, and markup most image files, including PDFs. You can pan and zoom in a file, use search to locate text, navigate pages in a multipage file, insert an image or stamp, export to PDF, or create a new markup session.

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

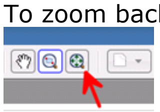


2. Place the cursor over any of the buttons in the toolbar for a tool tip to help you select the tool you need.

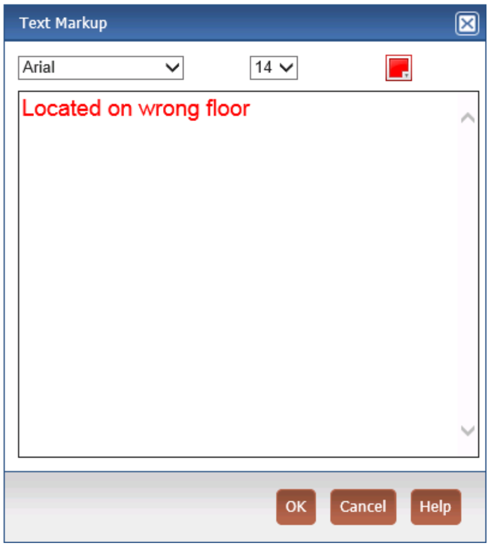
3. To zoom into a particular area of the file, select **Zoom Rectangle** on the toolbar. Click and drag a rectangular area to zoom into.



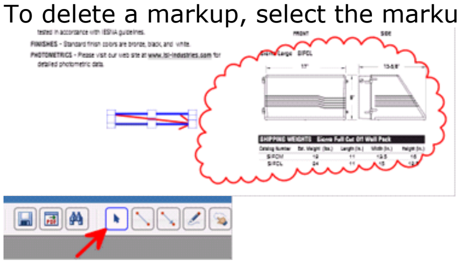
4. To zoom back out, select **Zoom to Full Page**.



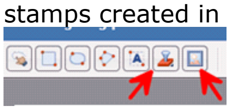
5. To add text in the markup, select **Text** on the toolbar. Click where you want to locate the text box. Enter your text and select **OK**.



6. 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.

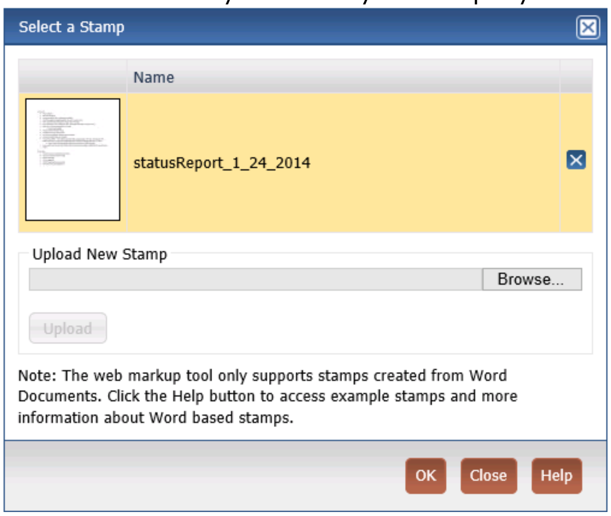


7. You can insert images and stamps as part of your markup. Adding a stamp is similar to adding an image, but the stamp must be prepared before you can add it to your markup. The Newforma Web Viewer supports adding stamps created in Microsoft Word.

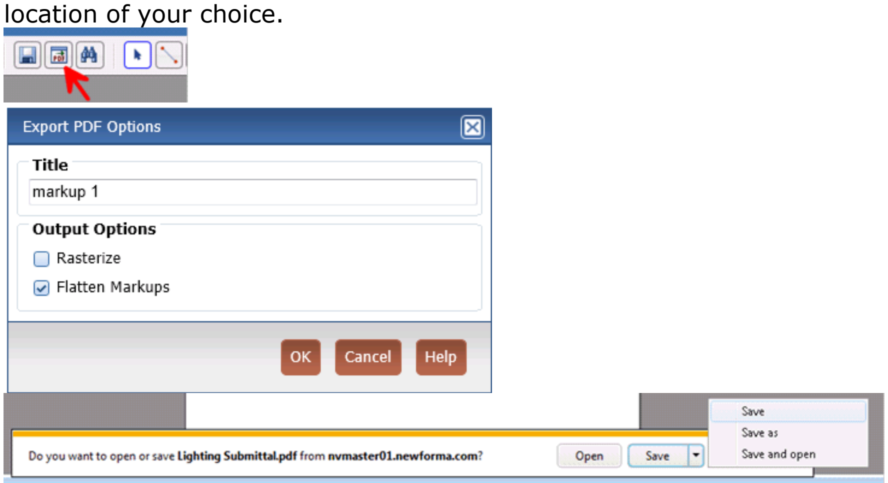


*Refer to the online help topic **Add a New Stamp** for more details on how to create a stamp.*

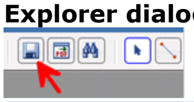
8. **Stamps:** After selecting **Insert Stamp** in the toolbar, the **Select a Stamp dialog box** appears. If this is the first time the stamp is being used, you need to select **Browse** button to locate the stamp, then select **Upload**. After the stamp is uploaded, it appears at the top of the list 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 select **OK**.

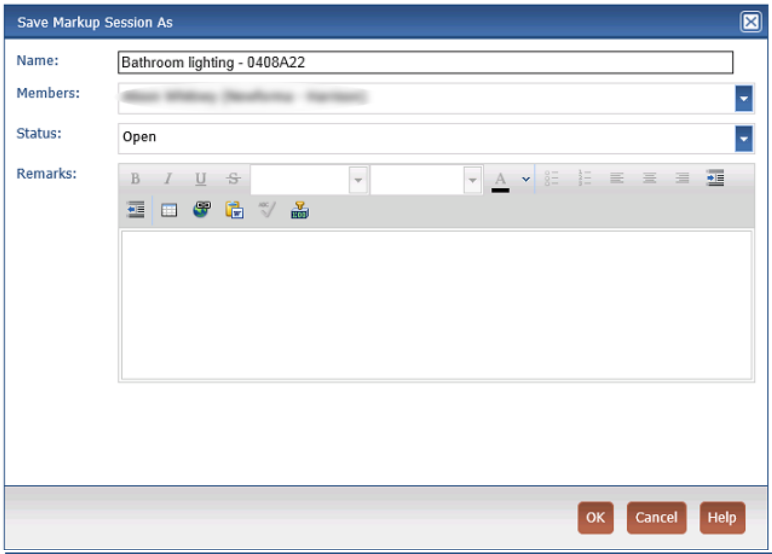


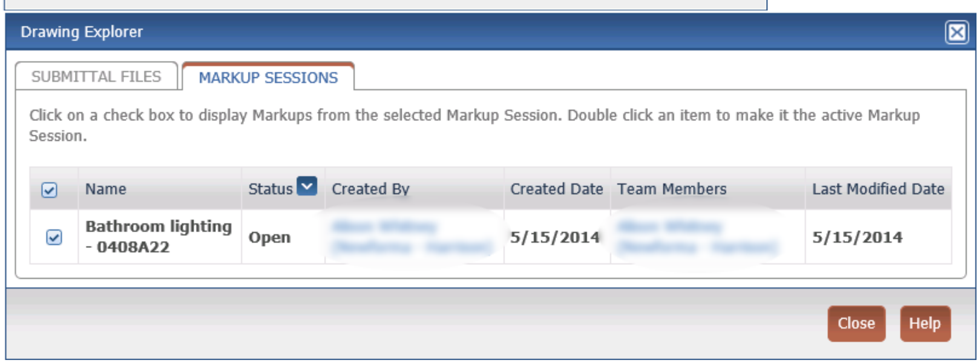
9. Fill out any additional information needed in the **Edit Stamp Contents dialog box**, then select **OK**. The stamp is placed in the markup. Reposition the stamp as needed.
10. To create a PDF, select **PDF** on the toolbar. In the **Export PDF Options dialog box**, enter a name, select your output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



11. To save your markup session for later editing or viewing by you and others, select **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. Select **OK** when done. The **Drawing Explorer dialog box** opens to show the markup session. Select **Close** when done.

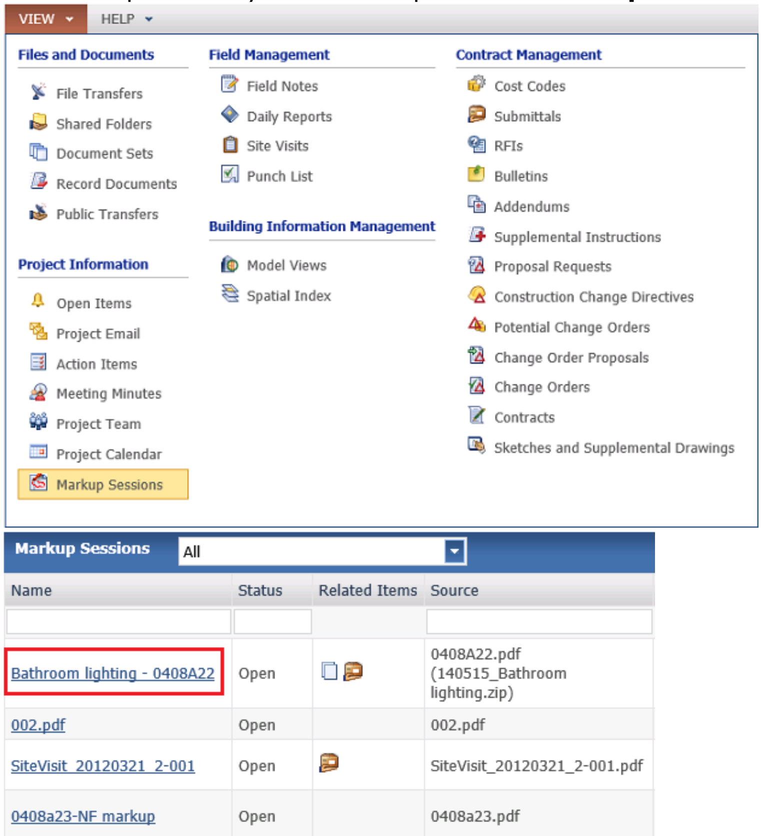






12. Select **the Close** button in the upper right hand corner to close the viewer.

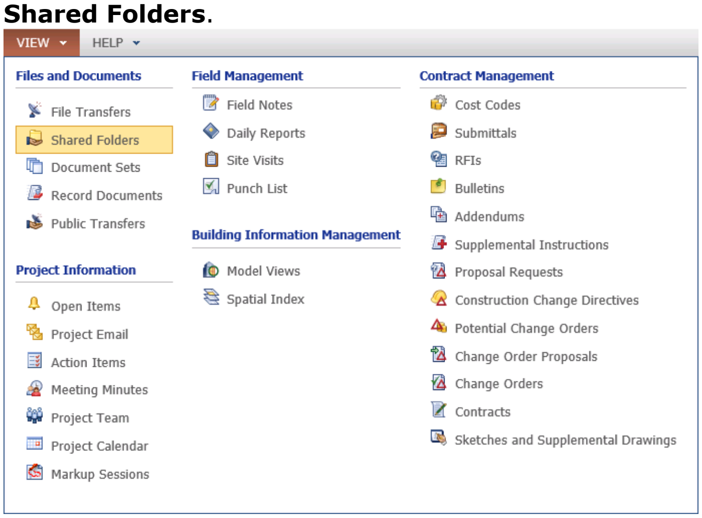
13. To reopen the markup session, select **View > Project Information > Markup Sessions**. Select the **Name** of the markup session you want to open in the **Markup Sessions log**.



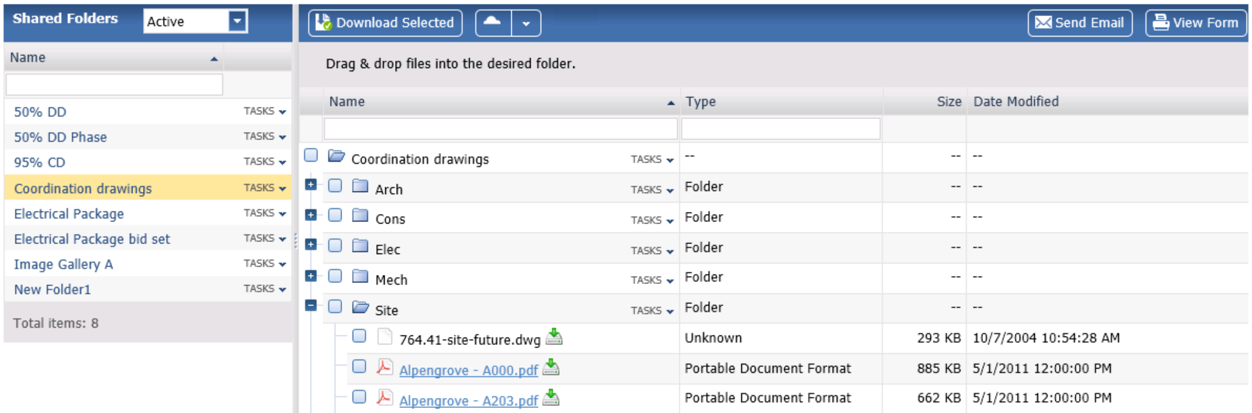
To download files from shared folders on Info Exchange

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

1. 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 select **View > Files and Documents > Shared Folders**.



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

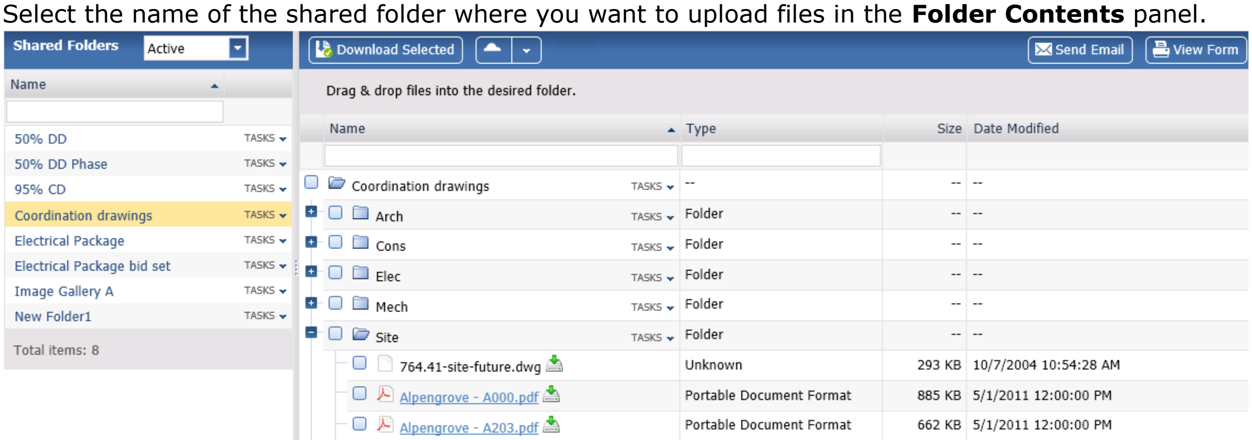


3. Select the **Tasks** drop-down for the shared folder and select **Download Folder** to download all files in the folder. You can also download specific files and subfolders by marking the checkbox next to the them and clicking **Download Selected**.

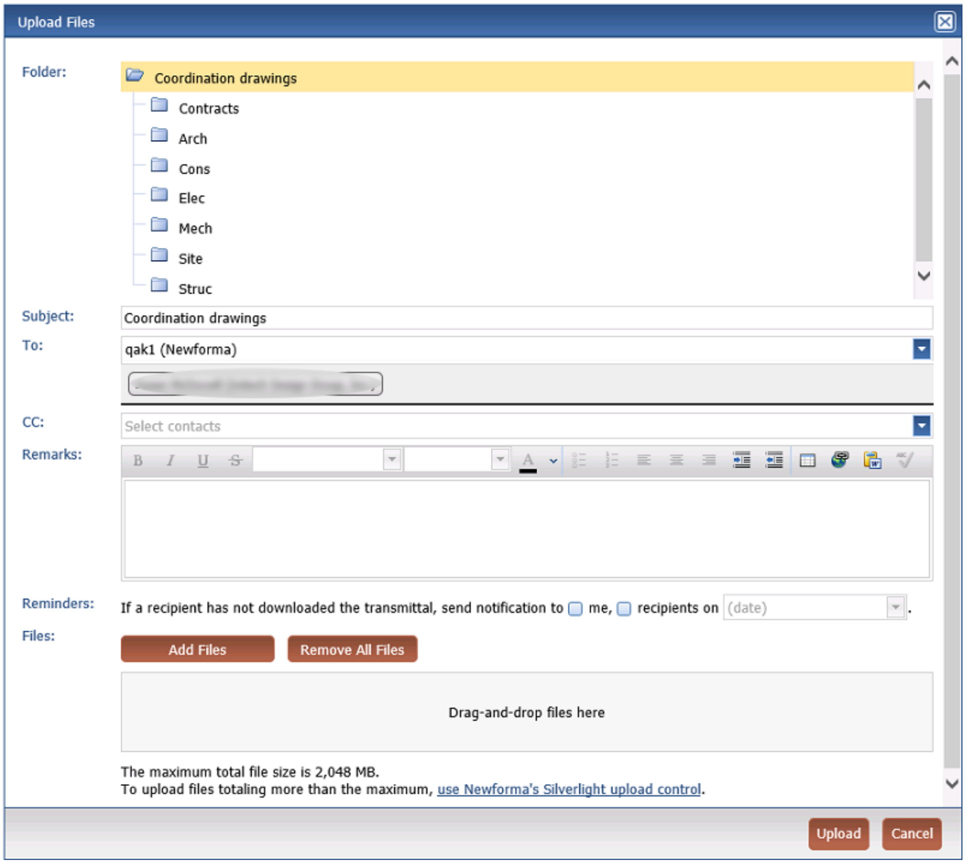
To upload files to shared folders

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

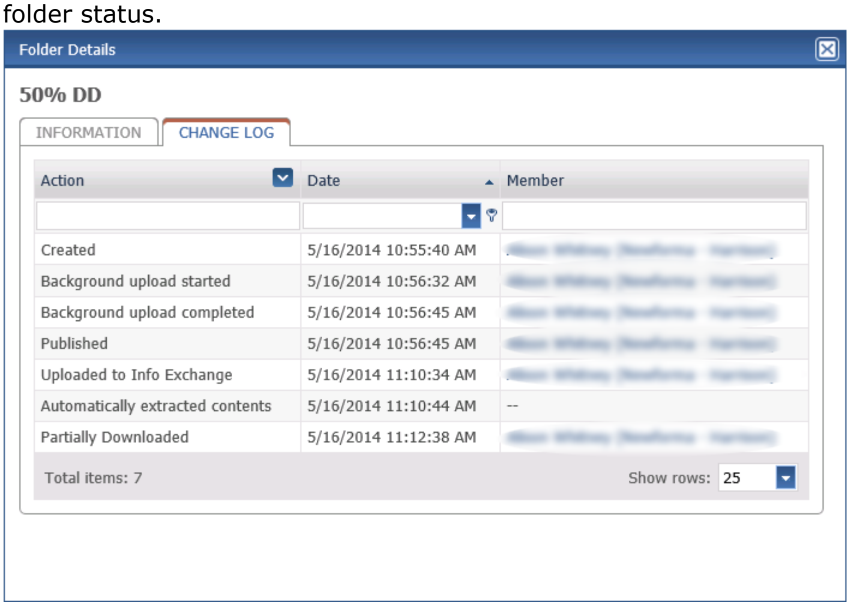
1. After logging in, go to **View > Files and Documents > Shared Folders** to open the **Shared Folders log**.
2. Select the name of the shared folder where you want to upload files in the **Folder Contents** panel.



3. Select the **Tasks** drop-down for the shared folder to which you want to upload files and select **Upload Files** to open the **Upload Files dialog box**, shown below:



4. Complete the transmittal information and add the files you want to upload.
5. Select **Upload** to upload the files.
6. To track your upload and which recipients downloaded the new files, select the shared folder in the **Folder Contents** panel, then select **Folder Details** from the **Tasks** drop-down. Select the **Change Log** tab to view the folder status.



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 and Newforma Project Cloud websites.

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