Overview

RSP's Perspective v6, powered by Newforma 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
- Use Newforma ID
- Receive a file transfer
- Send files from Info Exchange
- Download files from shared folders on Info Exchange
- Upload files to shared folders
- 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

Using Info Exchange

To log into Info Exchange after receiving an invitation

You will receive an email inviting you to use RSP's 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.

Below is an example of the 'Welcome' email. The password setup link included in the invitation email

can only be used once.

Subject: RSP Architects Info Exchange Account Notification

RSP
Welcome to Newforma Info Exchange
To make sharing files and knowledge easier, RSP Architects is providing you with free access to our project information management system: Newformae Info Exchange part of <u>Newforma Project Center</u> . Info Exchange offers a simple, but secure environment for collaboration on a variety of processes and is accessible with any internet connection.
Depending on your project role or scope, the following actions are possible:
Upload and download files
 Send and review Submittals and RFIs
Access action items, record documents, project email, the project calendar and more
Getting started is easy! Watch this brief tutorial.
Here is your account information. Please click the link below to set your password and get started.

 Username:
 yourname@email.com

 Password:
 Set Password

After setting up your password, you can use this link anytime to sign in to our site: <u>Click to sign in</u>

If you miss the 'Welcome' email or need it resent, contact your RSP project team to request sending

a password reset email like the one below.

Subject: RSP Architects Info Exchange Password Reset

RSP

GREETINGS PROJECT TEAM MEMBER

There was a request to change your password. Please click the link below to reset your password.

Username: yourname@email.com

Reset Password

After resetting your password, you can use this link anytime to sign in to our site:

Click to sign in

Tip: Bookmark our page for easier access. If you would rather not manage multiple accounts, you can click to <u>create a free Newforma® ID</u>.

RSP Architects

To use Newforma ID

To access RSP's site, users are granted an **Info Exchange ID** that is specific to RSP. If users work with multiple companies that utilize Newforma, they will have multiple Info Exchange IDs for each company's environment. **Newforma ID** provides a way for users to tie these Info Exchange IDs together into a single sign-on to provide access across all companies in which users have been invited to participate. Newforma ID is required to log into Newforma Mobile Apps and integrated cloud storage services.

Note that all of these IDs rely on your email address as your username, but password requirements may vary.

 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 II</u>	<u>D</u>
SIGN IN	
Remember username	

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. RSP requires you to log in to download files, so select the link at the bottom to log into the Info Exchange website and download the files.

Transmittal - 01495_1.pdf	
53 NB	
oject: Newforma File Sharing	
Notification about File Transfer Project Transfer	
Remarks	
Please see the attached information.	
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 username and select **Forgot Password?** to receive password reset instructions. Please note that passwords for RSP's Info Exchange environment are set to expire every 90 days.

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

Transfer				A File Transfers	Send Similar	Send Email	😁 View Form
Subject: Project Transfer From : (Newforma)	Date Sent : Expiration Date :						
TO: Adam Klose REMARKS FILES CHANGE LOG DOWNR.GAD ALL CONTENTS DOWNR.GAD	CC:	e Cloud Delivery					
Name	Ť	Гуре	Size	Date Modified			
Project Transfer Ktchen.jpg	TASKS =		 615 X8	** -* -* -* **			
🔟 🕼 kitchen.jpg 🛞		mage	615 K8				

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 by the RSP team to allow partial downloads (this is the default).

 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 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 of **10GB** per transfer on Info Exchange. If a transfer exceeding this size is required, please contact your RSP project team to coordinate.

- 1. Log into Info Exchange and select the appropriate project.
- 2. Click Send > Files in the menu bar from the Project Home page:

Shortcuts	
Send	View
Files	Sile Transfers
Submittal	🐼 Submittals
🕅 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)
То:	Select contacts
CC:	Select contacts
Remarks:	B I U 5 Tahoma ▼ 2(10pt) ▼ A ∨ 🖂 🗄 Ε Ξ Ξ Ξ Ξ Ξ 🖬 🖉 🛱 🏷 🍶
Reminders:	If a recipient has not downloaded the transfer, send notification to me, recipients on (date)
Files:	ADD FILES REMOVE ALL FILES
	urag-and-drop nies nere

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 Tran	le Transfers Inbox 👻 🗘 Sond Files							· · · · · · · · · · · · · · · · · · ·		
	Subject	Related Items	From	Date Sent	1	Expiration	Size	Access	т	Downloaded?
					- T		τ			
⇆	Project Transfer		Lori Beekman (Newforma)				614 KB	Recipients only		
Total ite	ms: 1									Show rows: 50 👻

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

Transfer			A File Transfers	Send Similar	🔛 Send Email	🐨 View Form
Subject: Project Transfer Date Sent : From : (Newforma) Expiration Date : To: Adam Klose CC:						
REMARKS FILES CHANGE LOG						
DOWNLOAD ALL CONTENTS DOWNLOAD SELECTED CONTENTS Conf	ure Cloud Delivery					
Name	Туре	Size	Date Modified			
Project Transfer TASKS =		-	-			
🔲 🗟 kitchen.jog 🛞	Image	615 KB				

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

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.

	Demo Project
MY PROJECTS DIRECTORY -	PROJECT HOME SEND ▼ VIEW ▼ HELP ▼
Shortcuts	
Send	View
Files	File Transfers
Submittal	⊘ Submittals
RFI	RFIs
(±) Change Order Proposal	Shared Folders
	C Action Items
	Project Email
	* See Send and View pulldown menus for additional tasks

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

MY PROJECTS PROJECT HOME SEND ▼ VIEW ▼ HELP ▼							
Shared Folders Active			🖂 Send Email				
Name Drag & drop files into the desired folder.	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 🖛		(m)					
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	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 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.

Note that there is a default size limit **10GB** per shared folder (highest level folder, including all subfolders). If your needs exceed this size limit, please contact your RSP project team to coordinate.

- 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	CONNLOAD SELECTED			🖂 Send
Name †	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**.

Shared Folders Active		DOWNLOAD SELECTED	
Name 1		UPLOAD CANCEL 1 files (6 KB)	
Physics Dept - public	Fasks -	Name	Ť
Total items: 1			
		Physics Dept - public	TASKS -
		🚡 bench.jpg	X Remove
		PHYSICS RDS - Demonstration Lab.pdf	
		PHYSICS RDS - Individual Instruction Area.pdf	
		PHYSICS RDS - Lab Teaching Support Conference.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. Click the Change Log tab to view the folder status.

Folder Details			
Physics Dept - public INFORMATION CHANGE LOG			
Action	Date	Ť	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 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 shortcuts menu.

RSP Newforma Demo Project	
MY PROJECTS DIRECTORY	IEW ▼ HELP ▼
Shortcuts	
Send	View
E Files	Sile Transfers
🐼 Submittal	😥 Submittals
RFI	RFIs
(±) Change Order Proposal	Shared Folders
	C Action Items
	Project Email
* See Send and View pulld	own menus for additional tasks

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.

Sender ID:	
Subject:	(Required)
Го:	Select contacts
C:	Select contacts
Action:	For Review
Spec Section:	
Remarks:	B I U 5 Tahoma ▼ 2(10pt) ▼ A, ~ □ □ □ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ● ● → →
Reminders: Files:	If a recipient has not downloaded the transfer, send notification to me, clear (date) .
	Drag-and-drop files here
	SEND SUBMITTAL CANCEL

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.

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



 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 t	forwarded an item to review. Select Markup and R	spond to view the Submittal,	comments and send the response.			
Submittal For	warded			Subm	ittals Send Response	Markup and Respond
Subject:	Walkway paving	Transmittal 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 REMARKS *	vnload, dick <u>Walkway paving</u> FILES * CONTENTS * EMAIL LOG					
DOWNLO	AD ALL CONTENTS DOWNLOAD SELECTED					
Name	6	1	Туре	Size	Date Modified	
🗌 🗁 Wa	lkway paving	TASKS -	10 <u>10</u> 0		-	
	Alpengrove - A208.pdf		Portable Document Format	846 KB		
	Transmittal Submittal - 00 21 00-00001 (Forwar	ded) 1.pdf	Portable Document Format	63 KB	1	

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

You	have been f	forwarded an item to review. Select Markup and Re	spond to view th	e Submittal files	, markup with any con	omments and	send the respo	inse.				
Sub	mittal For	warded								Submittals	Send Response	Markup and Respond
Sub	ject:	Walkway paving	Transmittal ID	00272							16 J	
To:		Bob Welder 12 (MacDougall Construction 12)	Date Sent:									
CC:	3		Via:	Info Exchange					 			

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

	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≡ ≣ Ξ Ξ Ξ Ξ Ⅲ & I 10 → 🚠
Reminders:	If a recipient has not downloaded the transfer, send notification to me , clean (date)
Reminders: Files:	If a recipient has not downloaded the transfer, send notification to me , clear (date) . ADD FILES REMOVE ALL FILES
Reminders: Files:	If a recipient has not downloaded the transfer, send notification to me , recipients on (date) . ADD FILES REMOVE ALL FILES Drag-and-drop files here
Reminders: Files:	If a recipient has not downloaded the transfer, send notification to me , recipients on (date) . ADD FILES REMOVE ALL FILES Drag-and-drop files here SEND RESPONSE CANCEL

 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:

MY PROJECTS DIRECTORY -	PROJECT HOME SEND -	VIEW - HELP -		
		Files and Documents	Field Management	Contract Management
hortcuts		File Transfers	Field Notes	Cost Codes
Send		Shared Folders	Daily Reports	Submittals
Files		Document Sets	Site Visits	RFIS
Submittal		Document Control	Punch List	Bulletins
		Project Information	Building Information Management	Addendums
() RFI		Open Items	Model Views	Supplemental Instructions
(±) Change Order Proposal		Project Email	Spatial Index	Proposal Requests
		C Action Items		 Construction Change Directives
		20 Meeting Minutes		? Potential Change Orders
	* See Send and View	Project Team		Change Order Proposals
		Project Calendar		Change Orders
		Markup Sessions		<u>×</u> ⊖∽ Contracts
				Sketches and Sunnlemental Drawings

6. The submittal log displays like this:

MY SI	UBMITTAL ACTIONS	MY EXPECT	ED SUBMITTALS				
ubm	ittal All My Action	15	👻 🕒 Send Submittal				
Drag	a column header here to g	roup by that colu	ma				
⊕	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 🏵	3/17/2020 Pending (a) 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 g	1/24/2020 Reviewed From: Bob Welder 12 (MacDougall Construction 12)	
	99 10 00 A-00001		#12312019 - Kitchen		1/10/2020 For Review 🕱	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 x	7/19/2019 Reviewed From: Bob Welder 12 (MacDougal 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:

MT PROJECTS PROJECT HOME SEND + VIEW + HELP +	
Shortcuts	•
Send	View
Files	File Transfers
Submittal	Submittals
🛞 RFI	RFIs
	Shared Folders
	C Action Items
	🕞 Project Email

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

Actio	n Item	s Open	- (Add Action Item	/					Export	-
	٢	Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority T	Status T	Action Completed	Supporting Documents
		• 7								- T	
1	٢		00162	Review drawings	\$	Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		22
1	٩		00166	Hole in wall		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file
1	٢		00168	Order wallpaper		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress		-
1	٩	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**, **Supporting Documents**, **Related Items** and **Change Log** tabs on the **Action Item page**.

Action Item					
Subject:	Review drawings		ID:	00162	
Status:	Not Started		Type:	Action Item	
Percent Complete:	0 %		Priority:	Normal	
Assigned:			Disciplines:		
Due Date: Remind:	disabled		Assigned To:	Bob Welder 12 (MacDou 12) and one other	ugall Constructio
Action Completed:			CC:		
Keywords:			Assigned By:	Adam Klose 12 (Jefferso 12)	on Mill Associate
DESCRIPTION	DISCUSSION	EMAIL LOG	SUPPORTING DOCUMEN	rs Related Items	CHANGE LOG
review inclu	ded drawings.				

 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			
Туре:	Action Item	-	ID:	00162
Status:	Not Started	-	Disciplines:	▼
Percent Complete:	0	$\hat{\mathbf{v}}$	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 C days before	e 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> 5	Tahoma 🔻 2 (10pt) 🔻	A _∕ ∨		III 2 III 8 1 1 1
review inclu	ded drawings.		_	
SAVE	SAVE & CLOSE CANCEL	Senc	l change notificatio	on email

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

Ac	tio	n Items lo	g								
Acti	on Item	ns Open	-	Add Action Item						Export	•
	0	Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority T	Status T	Action Completed	Supporting Documents
		•								• •	
1	1		00162	Review drawings	\$	Bob Welder 12 (MacDougall Construction 12) and one other	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	Not Started		-
1	1		00166			Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	High	Not Started		1 file
1	٢		00168	37		Bob Welder 12 (MacDougall Construction 12)	Adam Klose 12 (Jefferson Mill Associates 12)	Normal	In Progress		7
1	1		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	Assigned To:	Select contacts	-
Priority:	Normal	•		
Assigned:	(No Assigned Date)	-		
Due Date:	4/21/2020	-		
	Remind 2 adays before due	CC:	Select contacts	-
Action Completed:	(No Completed Date)	 Assigned By: 	Select team member	-
Keywords:				-
DESCRIPTION	DISCUSSION			
B I <u>U</u> S	Tahoma 2 (10pt) X	✓ III III III III III	3 3 3 3 111 2 11 2 11 2 11	
	Send c	hange notification ema	ail SAVE SAVE & CLOSE	CANCEL

3. 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 5 Tahoma ▼ 2(10pt) ▼ A, ∨ i= i= i= = = = = = :: P ii P ii ∵	. 🔒
	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	NCEL

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**.

Fransmittal ID: Date Sent: /ia: Due:	00272 4/13/2020 Info Exchange 4/17/2020	
Date Sent: /ia: Due:	4/13/2020 Info Exchange 4/17/2020	
/ia: Due:	Info Exchange 4/17/2020	
Due:	4/17/2020	
	1/1//2020	
NTENTS		
d <u>) 1.pdf</u>)	TASKS
	NTENTS	NTENTS d) 1.pdf ●

- 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. Enteryour 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.



 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	\bowtie
Name	
statusReport_1_24_2014	X
Upload New Stamp	
В	rowse
Upload	
Note: The web markup tool only supports stamps created from Word Documents. Click the Help button to access example stamps and mor information about Word based stamps.	e
OK 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				
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OK CANCEL HELP				
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Do you want to open or save Alpengrove - A208(Walkway paving).	.pdf from infoexchange.jma-demo.com?	Open Save 🔻	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 addadditional 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.

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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**.

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Review #1

Closed