# Newforma Info Exchange Quick Start Guide for External Users

## 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:



## 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: Newforma® Info Exchange part of Newforma Project Center. 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:
Click to sign in

*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 create a free Newforma® ID.

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.

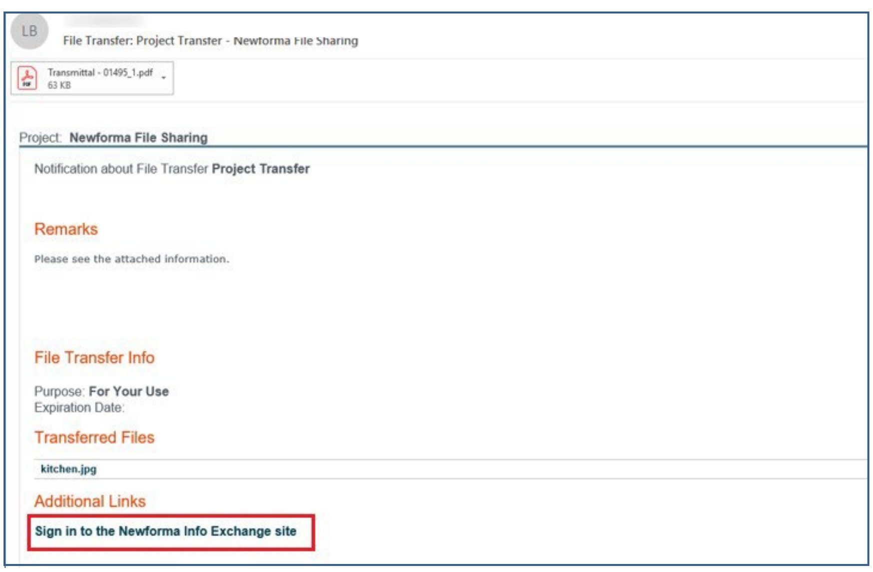
*Note that all of these IDs rely on your email address as your username, but password requirements may vary.*

1. 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**.

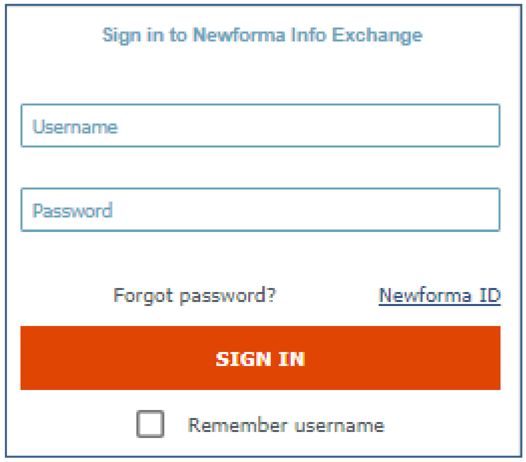

## To receive a file transfer

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.

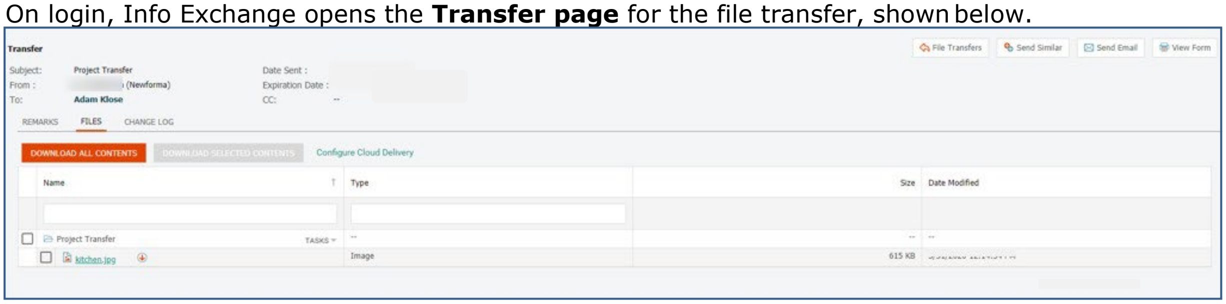


2. When you click the link to login to Info Exchange, you are prompted to enter your username and password. Enter your information and click **Sign In**.




*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. On login, Info Exchange opens the **Transfer page** for the file transfer, shown below.




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).*

5. 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.

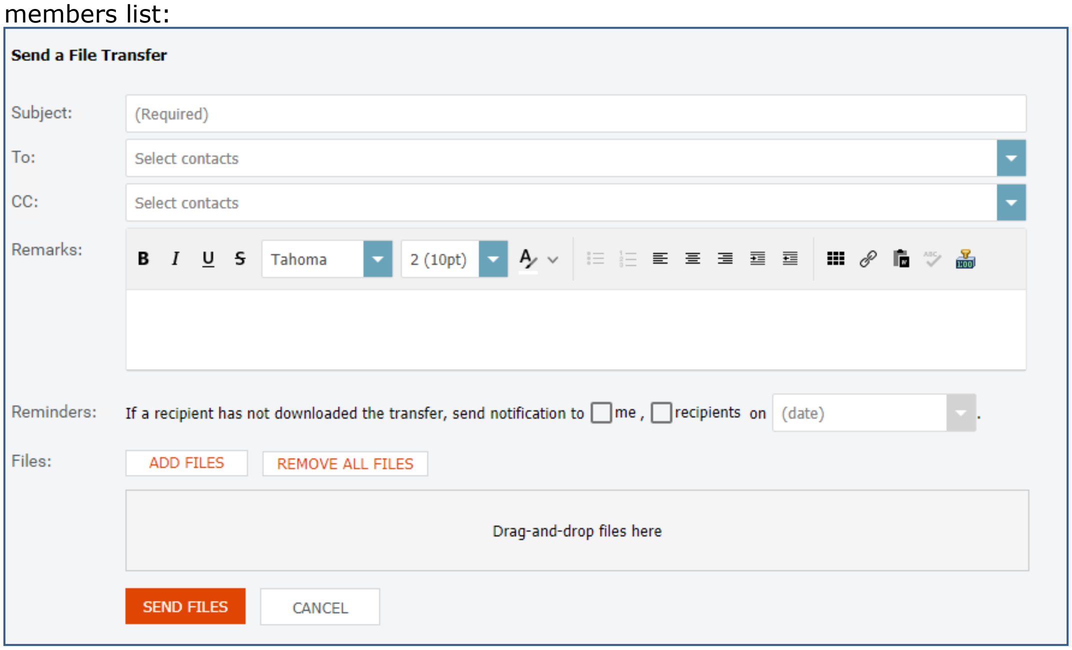
## To send files from Info Exchange

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**:


3. Fill in the transmittal information, including selecting recipients for the file transfer from the project team members list:

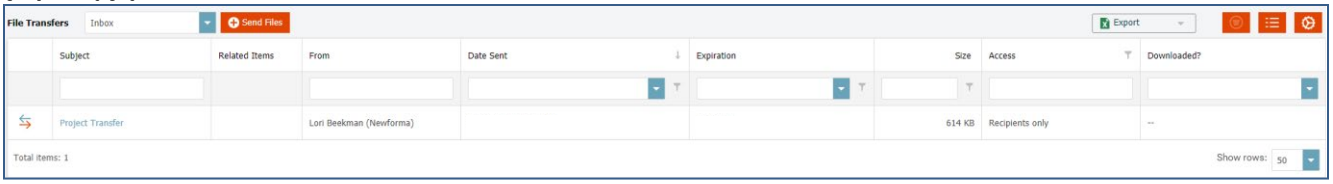



4. Click **Add Files** to add files to the transfer.

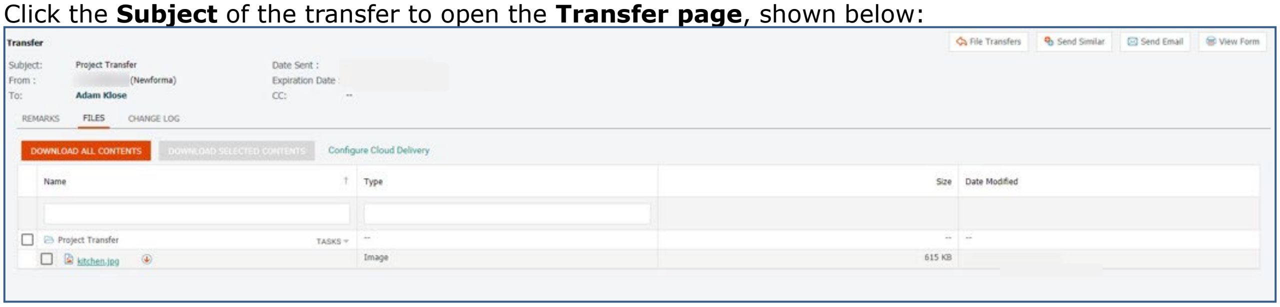
*Depending on your browser, you may also be able to drag and drop files to a transfer to upload them. Please see **Drag and Drop Files in a Transfer** for more information.*

*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**, shown below:




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

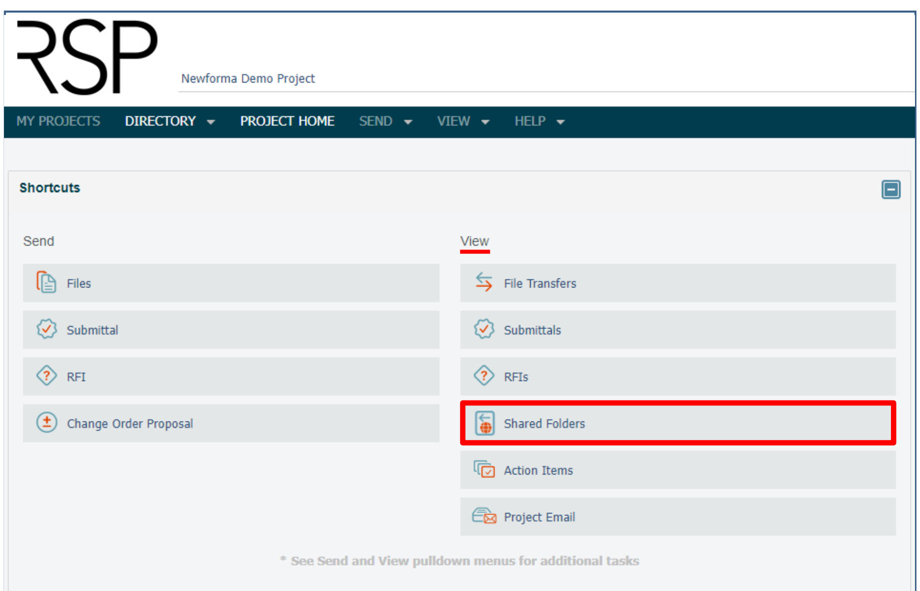



8. Click the **Change Log tab** to view the history of actions related to the transfer.

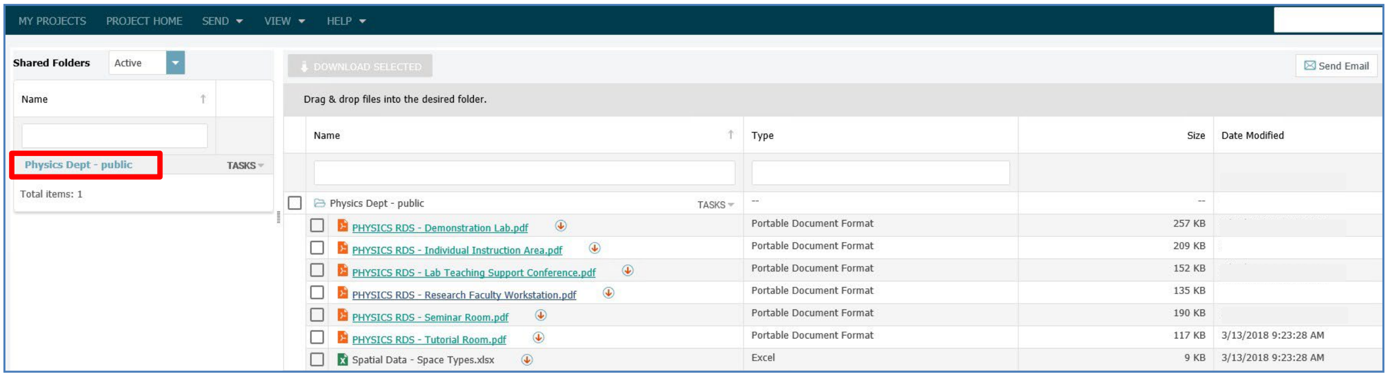
## To download files from shared folders on Info Exchange

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

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 click **View > Files and Documents > Shared Folders**.



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



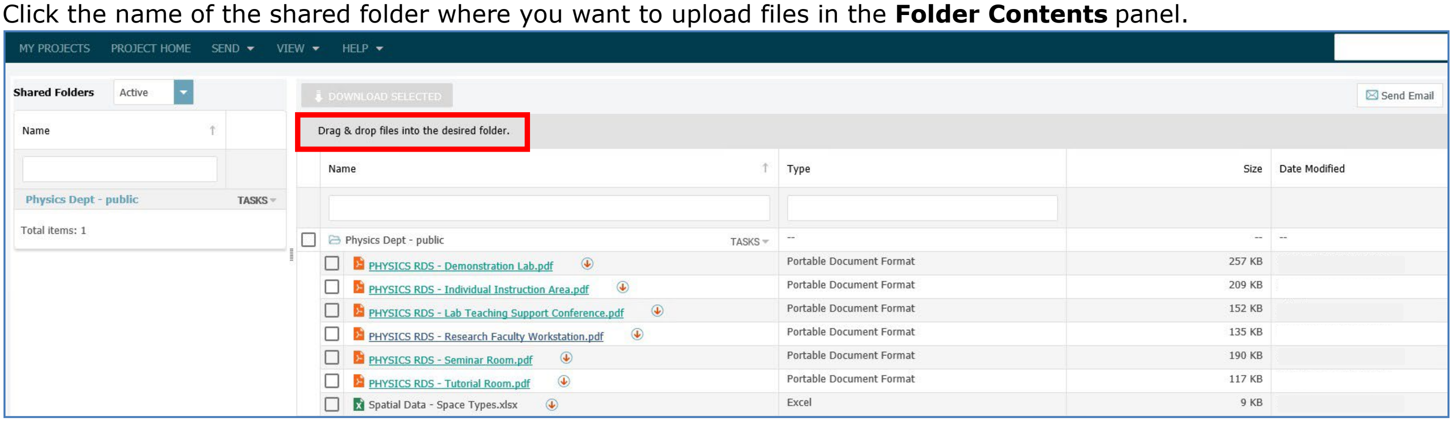

3. Click the **Tasks** drop-down for the shared folder and select **Download Folder** to download all files in the folder. You can also download specific files and subfolders by marking the checkbox next to them and clicking **Download Selected**.

## To upload files to shared folders

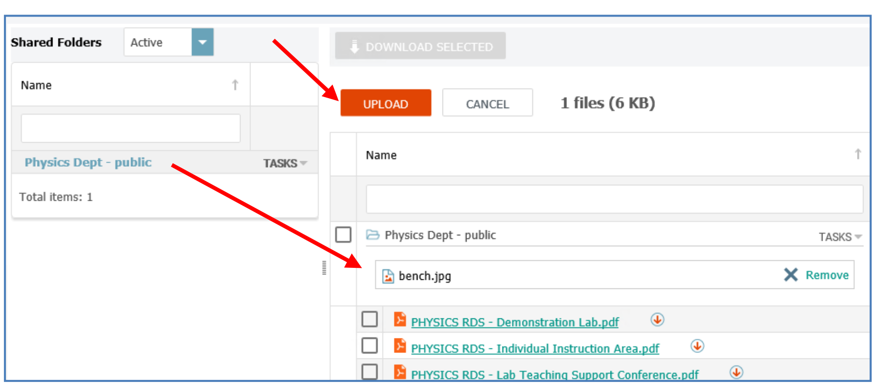
You may also have rights to upload new information to the shared folders through the website.

*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.*

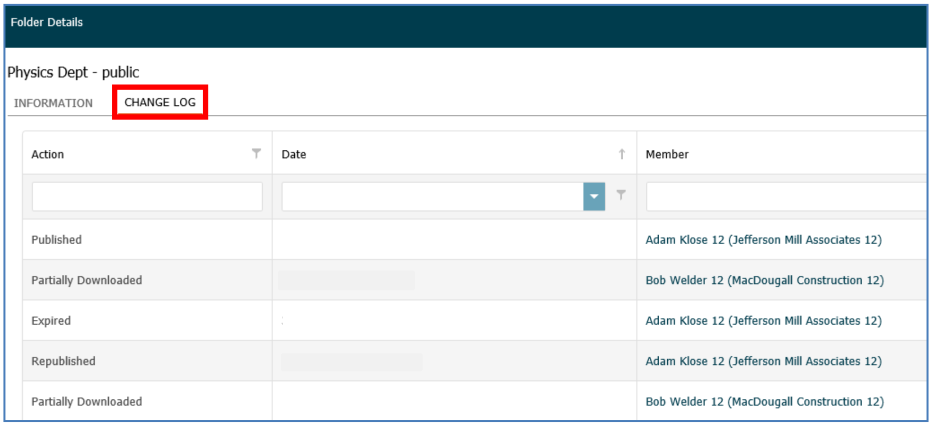
1. After logging in, go to **View > Files and Documents > Shared Folders** to open the **Shared Folders log**.
2. Click the name of the shared folder where you want to upload files in the **Folder Contents** panel.




3. Drag and drop files into the desired folder. There will be a preview of where the files will go prior to choosing **Upload**.



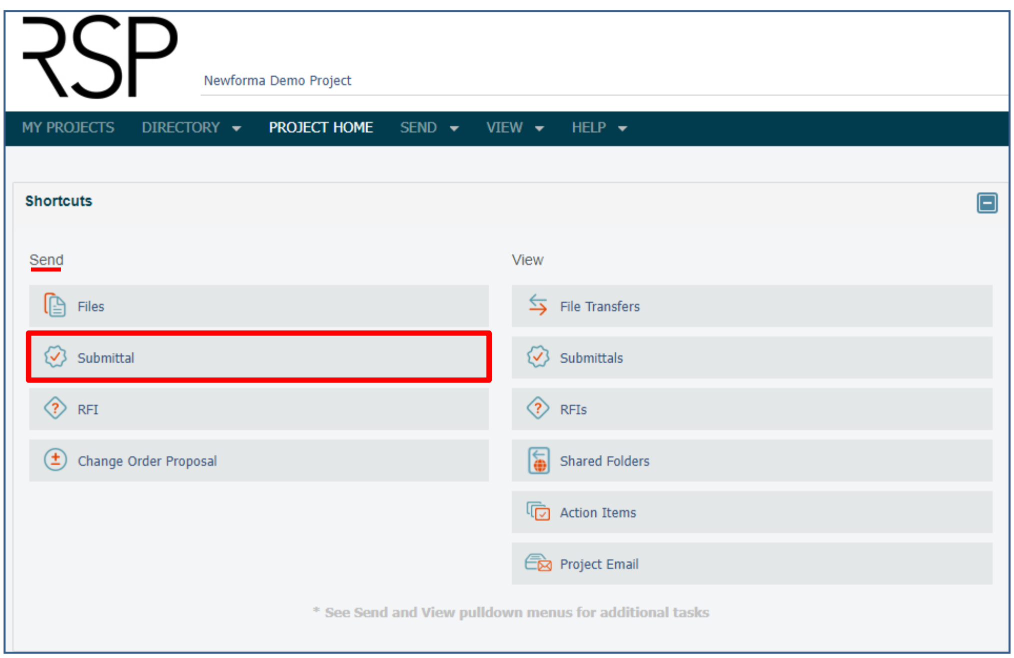
4. To track your upload and which recipients downloaded the new files, click the shared folder in the **Folder Contents** panel, then select **Folder Details** from the **Tasks** drop-down. Click the **Change Log** tab to view the folder status.



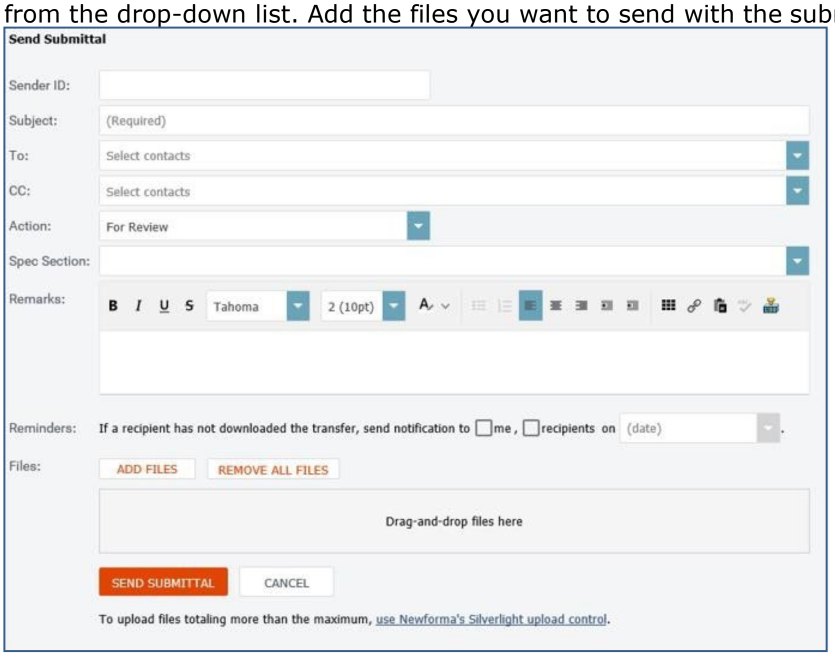

## To send an RFI, Submittal or Change Order Proposal via Info Exchange

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.



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.

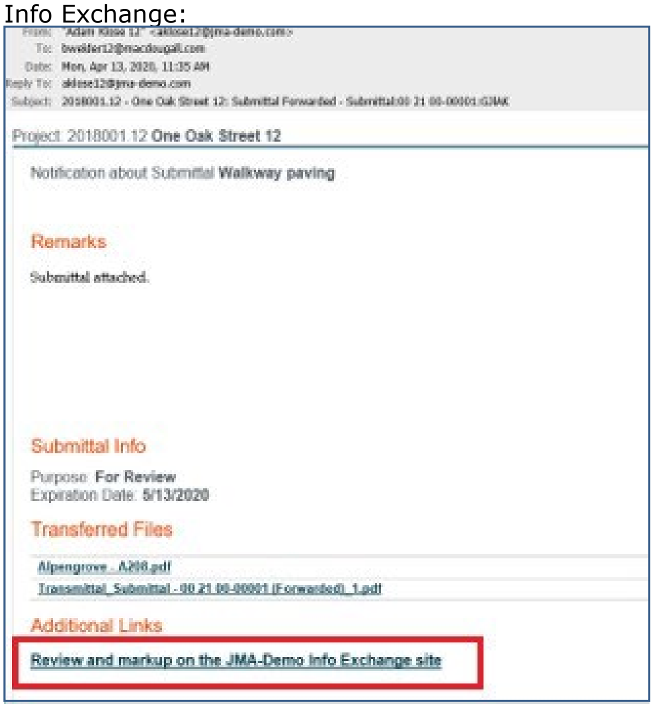



3. Click **Send Submittal**.

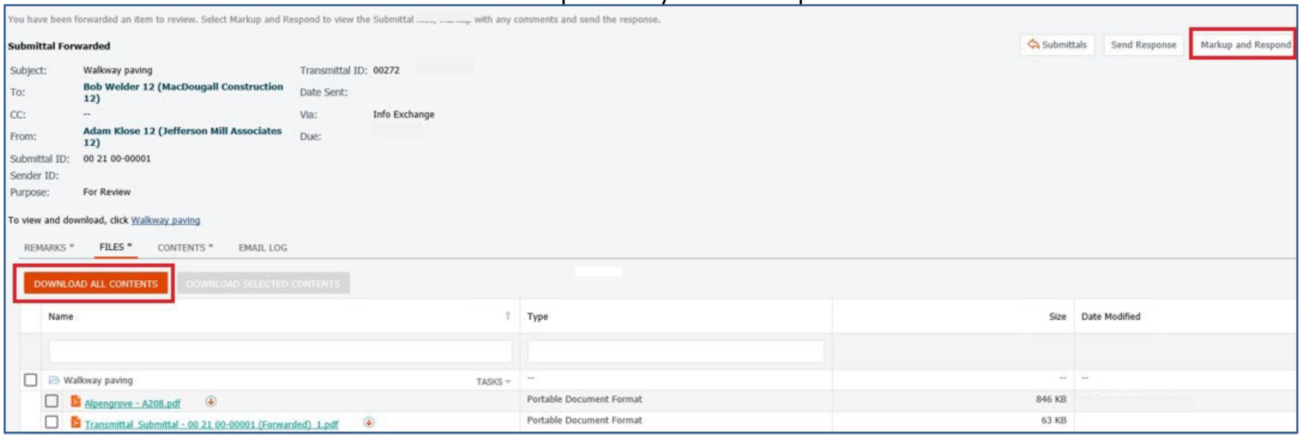
## To respond to a forwarded submittal

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

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

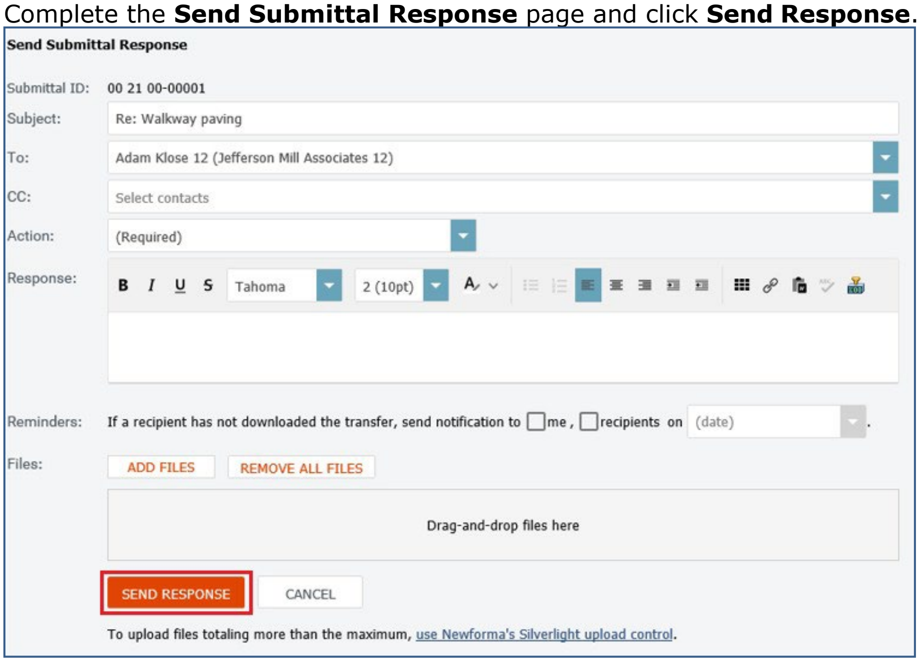


2. Log into the site. You are directed to the **Submittal Forwarded page**. Click the **Files** tab, then click **Download All Contents** to download the contents of the submittal. You may also choose **Markup and Respond** if you would like to use the Newform web viewer to provide your markups.

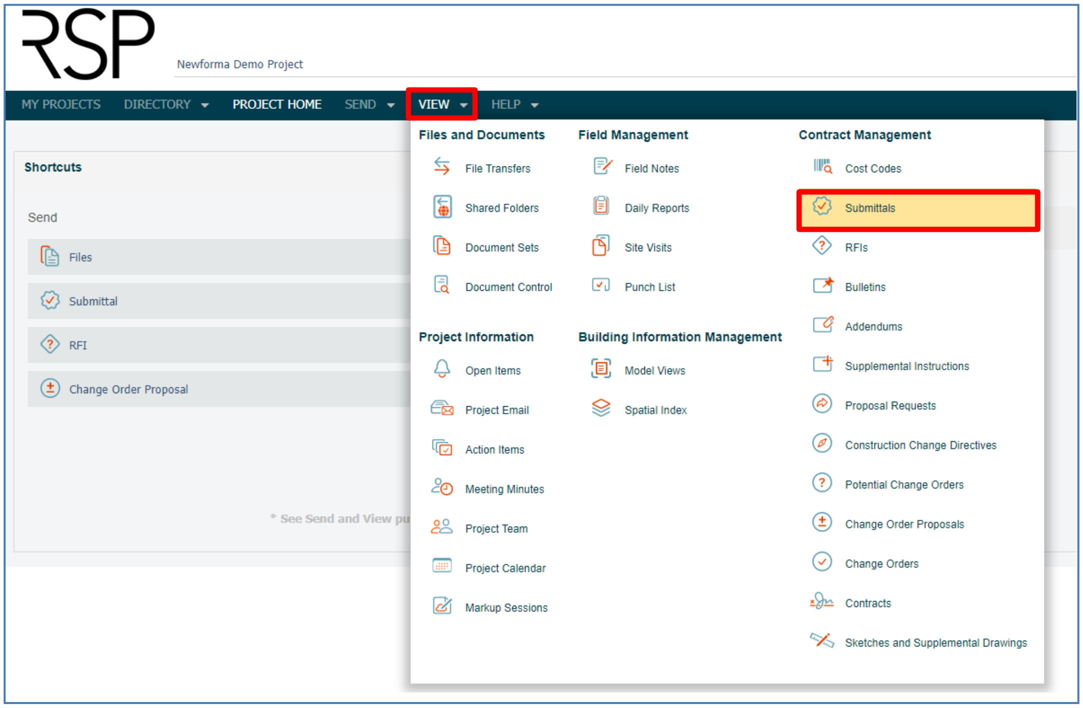



3. Click **Send Response** to respond to the submittal.

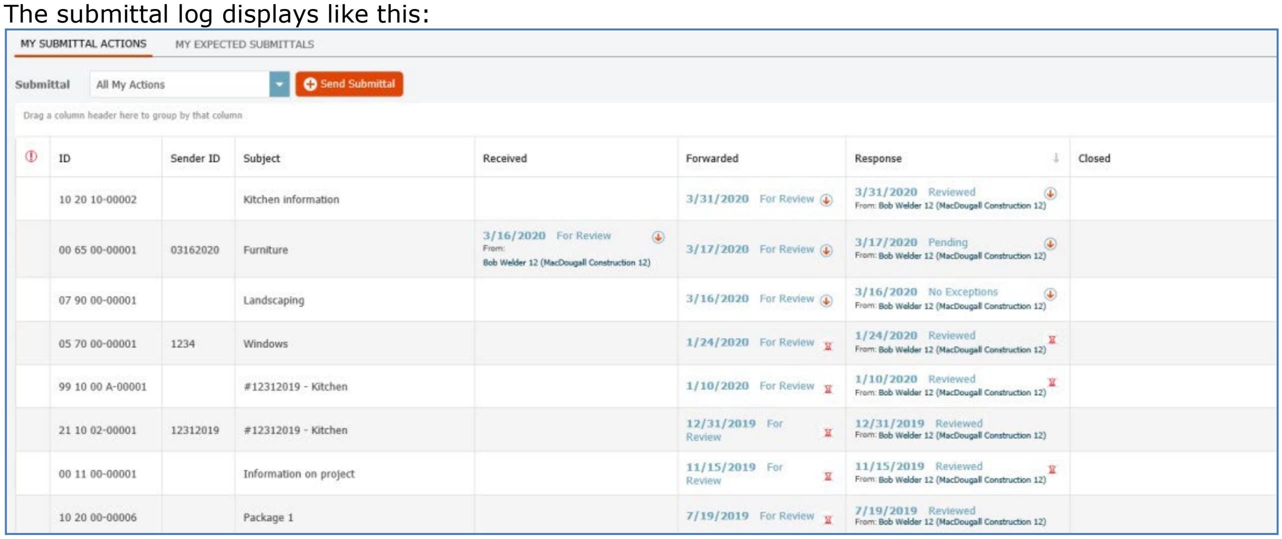

4. Complete the **Send Submittal Response** page and click **Send Response**.



5. 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:




6. The submittal log displays like this:

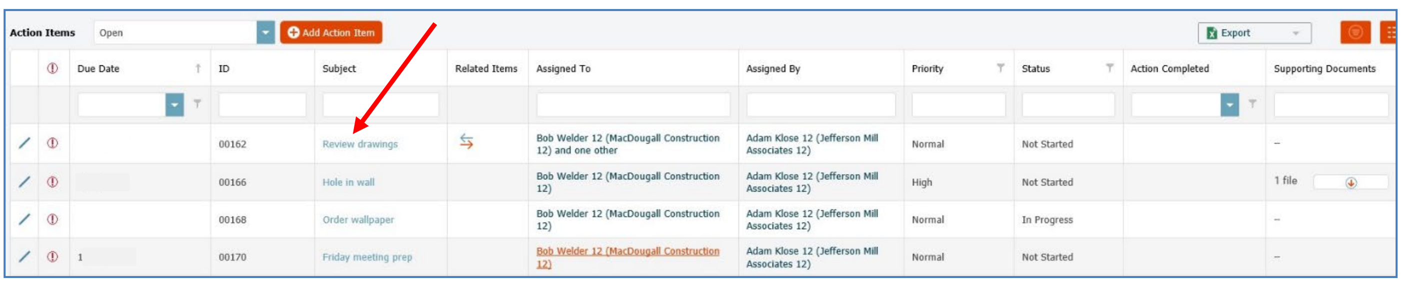


## To view and update action items

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.

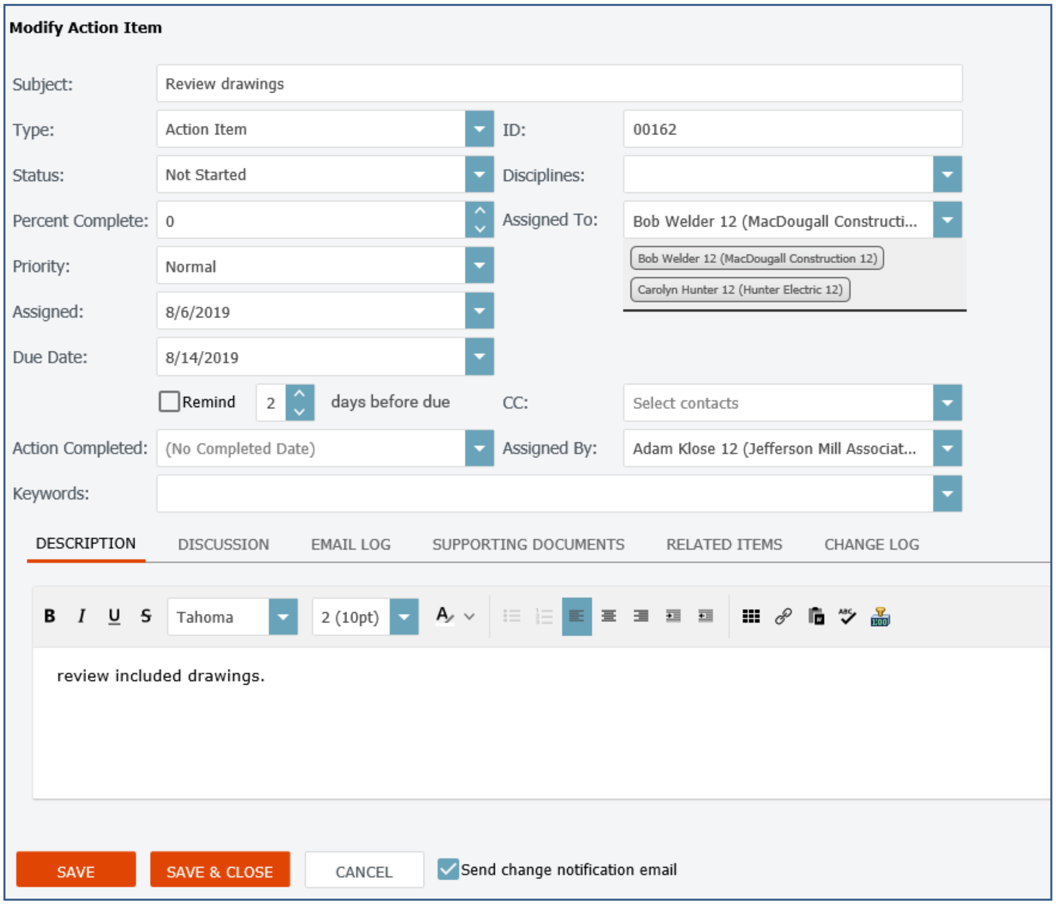
1. If you receive an email notification that you have been assigned an action item, you can follow the link in the email to log into the site and view or update the action item. You can also log into the site and click **View > Action Items** from the menu bar or use the shortcut from the **Project Home**:


2. Click 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**.

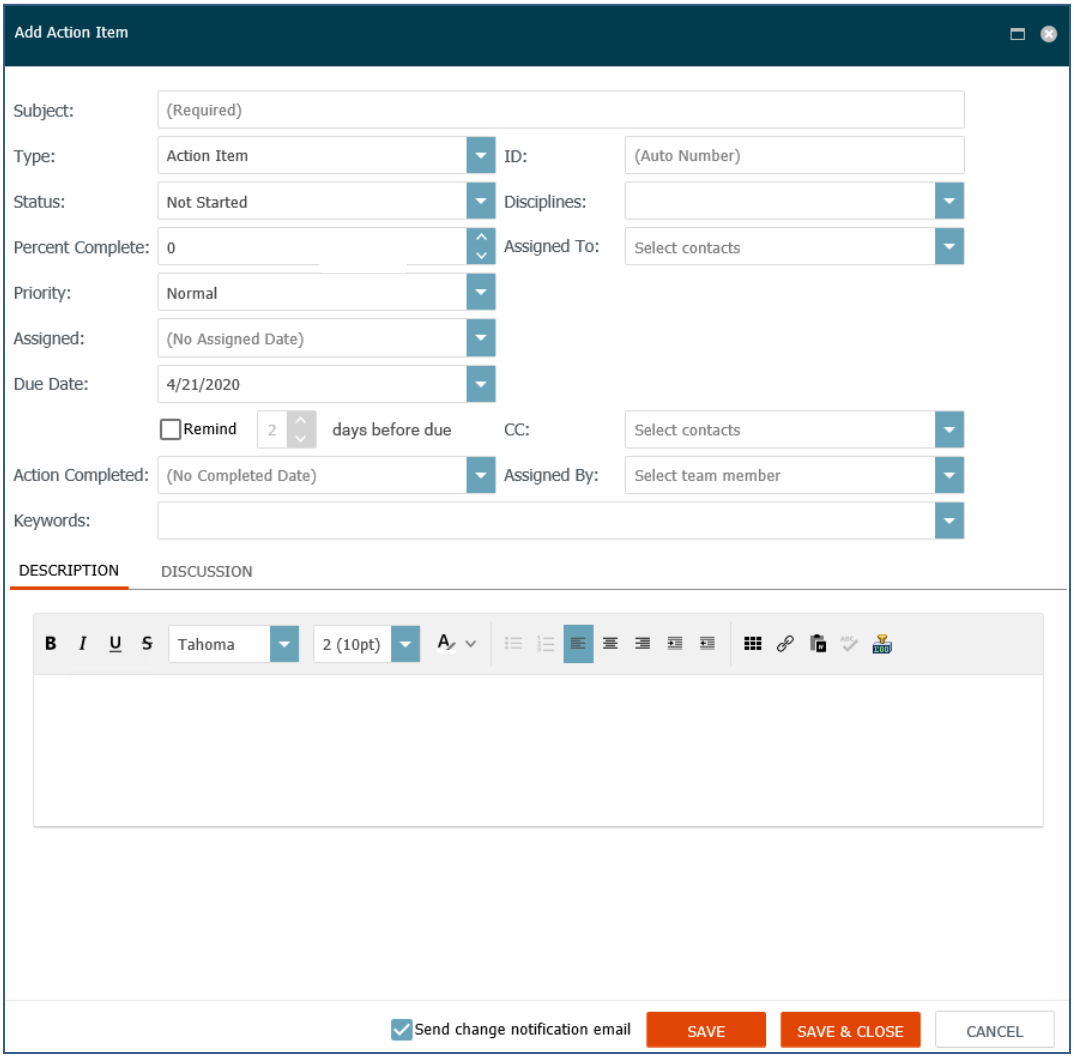
4. You may have rights to edit action items. To update an action item, click **Modify** to open the **Modify Action Item page**. For example, you can change the status or add notes in the **Description** field regarding progress on the item. Select **Save and Close** when done.



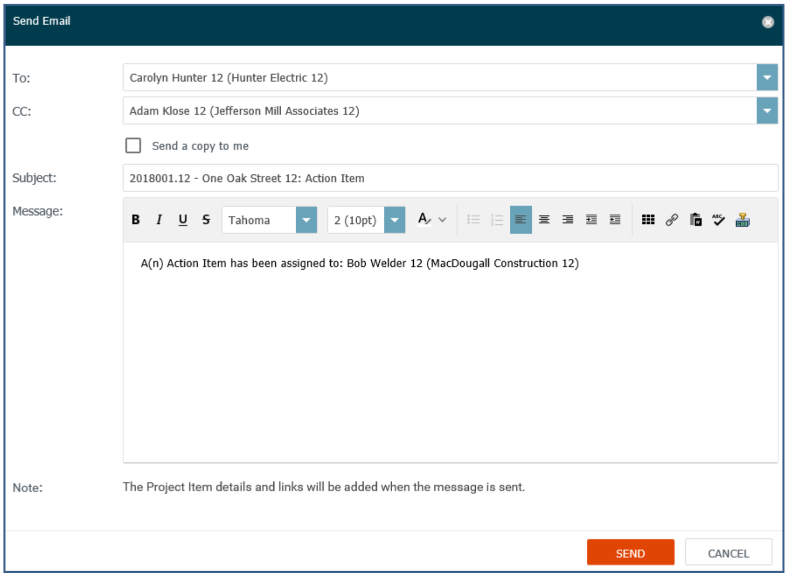

## To create action items

1. Based on your permissions, you may have the ability to add new action items. Click **Add Action Item** in the **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. Click **Save and Close** when done.



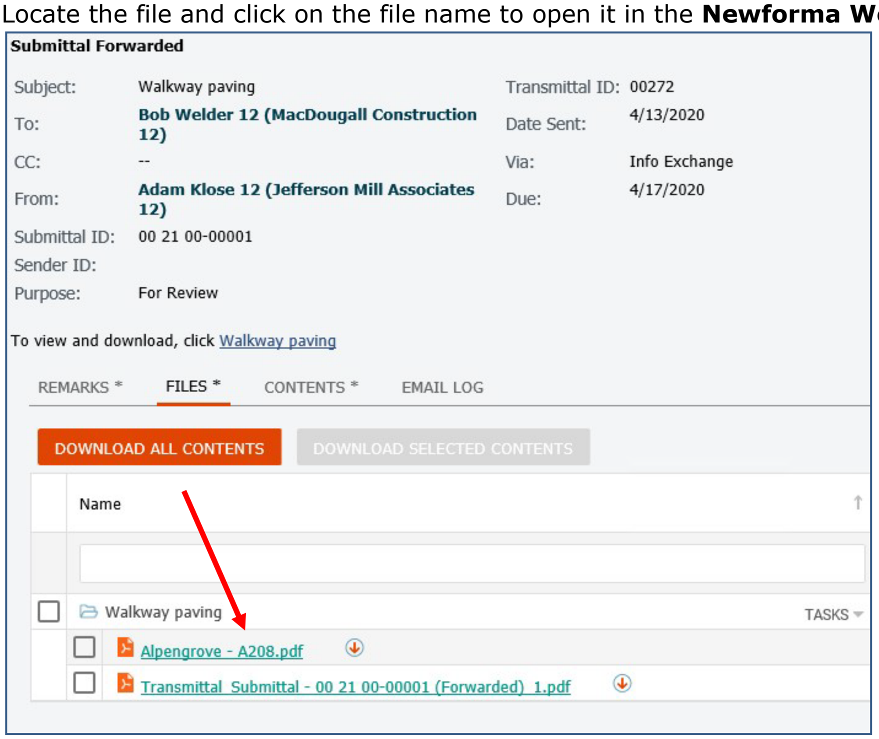
3. If you selected **Send Change Notification Email**, the **Send Email dialog box** appears. Add recipients and make other changes as needed. Click **Send** when ready. People in the **To:** and **CC:** fields receive an email notification of the action item.




## To use Newforma Web Viewer to markup or stamp files

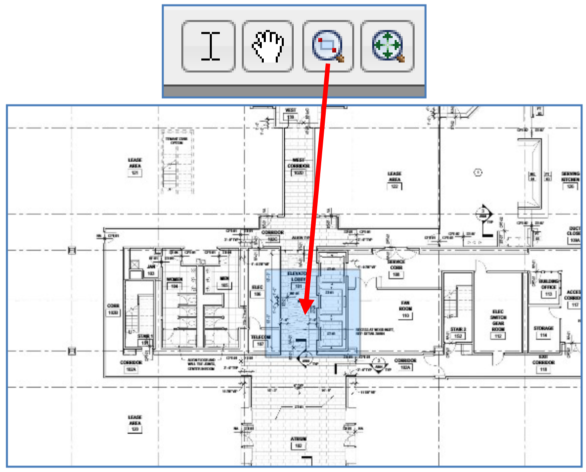
You can use the Newforma Web Viewer to view, stamp, and markup most image files, including PDFs. You can pan and zoom in a file, use search to locate text, navigate pages in a multipage file, insert an image or stamp, export to PDF, or create a new markup session.

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

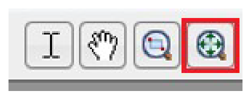


2. Place the cursor over any of the buttons in the toolbar for a tool tip to help you select the tool you need.

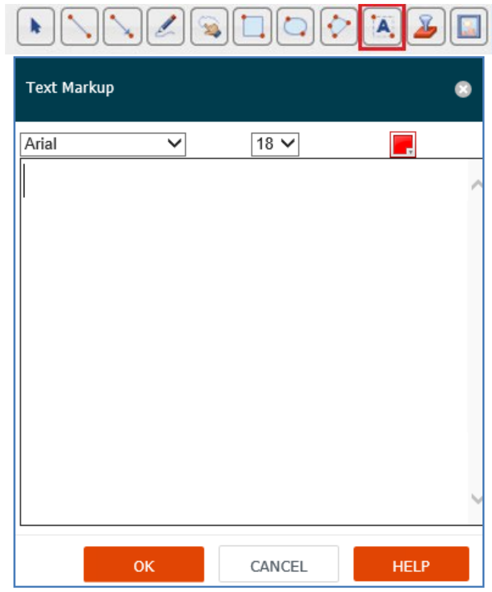
3. To zoom into a particular area of the file, click **Zoom Rectangle** on the toolbar. Click and drag a rectangular area to zoom into.



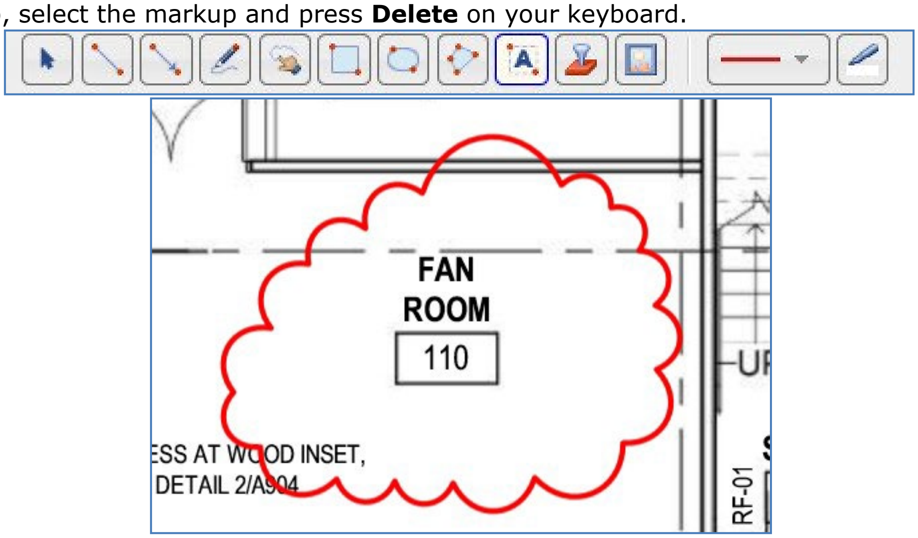
4. To zoom back out, click **Zoom to Full Page**.



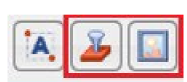
5. To add text in the markup, click **Text** on the toolbar. Click where you want to locate the text box. Enter your text and click **OK**.




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.



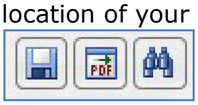

7. You can insert images and stamps as part of your markup. Adding a stamp is similar to adding an image, but the stamp must be prepared before you can add it to your markup. The Newforma Web Viewer supports adding stamps created in Microsoft Word.

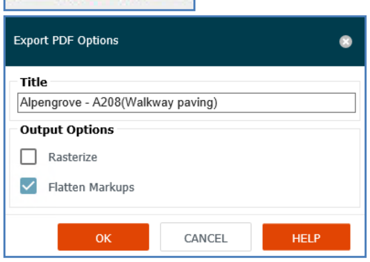


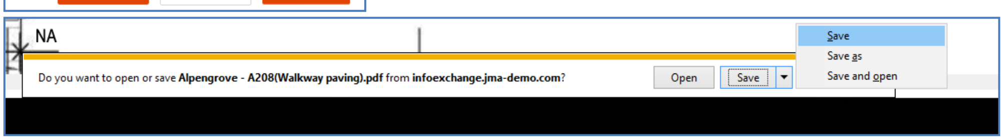
*Refer to the online help topic **Add a New Stamp** for more details on how to create a stamp.*

8. **Stamps:** After 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**.

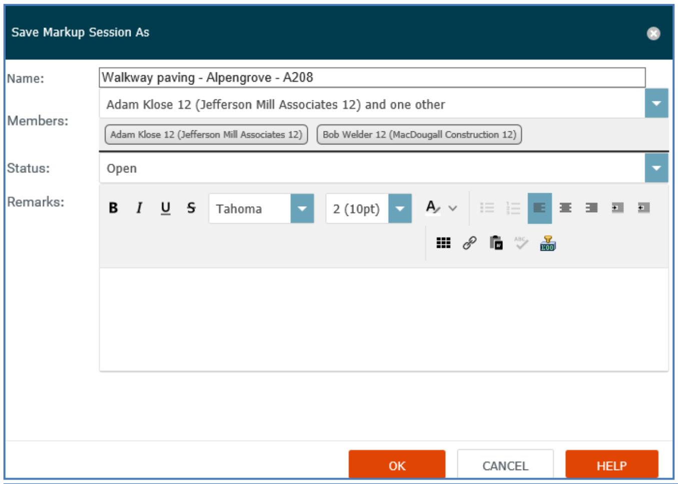

9. Fill out any additional information needed in the **Edit Stamp Contents dialog box**, then click **OK**. The stamp is placed in the markup. Reposition the stamp as needed.
10. To create a PDF, click **PDF** on the toolbar. In the **Export PDF Options dialog box**, enter a name, select your output 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.

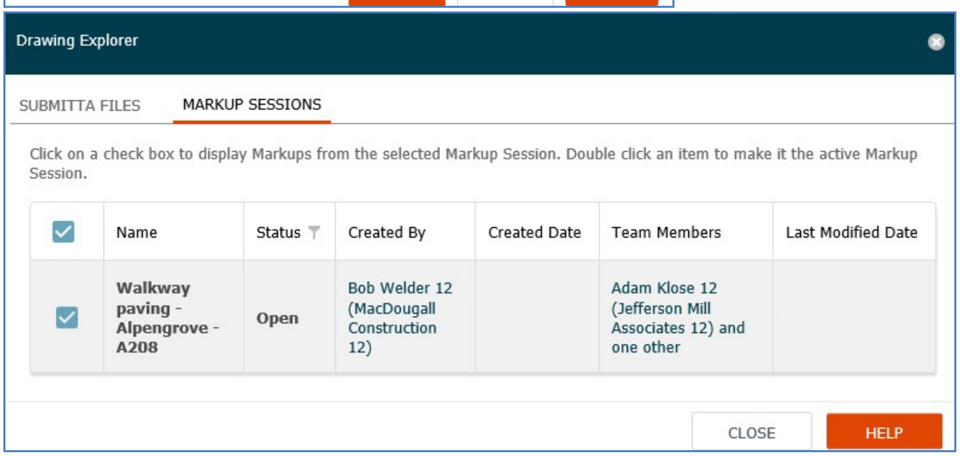




11. To save your markup session for later editing or viewing by you and others, click **Save** on the toolbar. In the **Save Markup Session As dialog box**, enter a name for the markup session. Optionally, you can add additional members from the project team, change the status and add remarks. Click **OK** when done. The **Drawing Explorer dialog box** opens to show the markup session. Click **Close** when done.




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**.