



Project Email – Newforma Project Center enables project team members to gain control of the flow of project information into their email inbox and ensure that project-related email messages are captured as part of the project record. **The Project Email** activity center shows every email message filed to the currently selected project, simplifying the process of finding emails or any specific information buried in them. Column filters help users navigate quickly to the email they seek. In addition, the Search function makes it easy to find specific items of information in any filed email or email attachment. Members of the internal project team use the Project Email activity center for visibility to all project email whether or not they were included on the original distribution. Email messages related to action items, RFIs, submittals and transmittals can also be logged in through the appropriate processes from the Project Email activity center.

Filing Project Email – Project-related email messages can be easily and quickly filed to a project by dragging and dropping messages into project folders within your email client, or by including a project email address in the distribution of the message. Newforma Project Center automatically creates and manages these folders and the project email address for each of your projects. Messages that are filed to a project are automatically moved to the file server containing your project information and displayed in the Project Email activity center. This provides a unified project record containing all of your project information, including email and all of its attachments. Duplicates of emails filed into the Project Email activity center are automatically removed. These capabilities are available for any mainstream email client operating in conjunction with an IMAP-compatible email server, including Microsoft Outlook and Exchange Server, Lotus Notes and Domino Server, Novell Groupwise and Google Gmail.

Add-in for Outlook – In addition to the capabilities described above, the **Newforma Project Center add-in for Microsoft Office Outlook®** provides users of Microsoft Outlook with additional capabilities, including the ability to log and process emails specifically related to action items, RFIs, submittals, project timeline and transmittals, without leaving their Outlook inbox.



Search – The **Search** function of Newforma Project Center software finds search terms as they appear in documents and emails across all of your project information, including transmittals, submittals, RFIs, action items and markup sessions. It finds terms in nearly 200 commonly used industry formats, such as CAD, PDF, DWF and Microsoft Office files. It also finds terms in external references, email attachments and ZIP files. It even finds search terms as they appear in image properties, or in the object properties of DWG, DWF and IFC files. The ability to search within a search, and to filter and sort your search results, lets you narrow results quickly. You can search a single project, or include multiple active, archived and off-line projects. Search functionality supports international languages, including Chinese characters.

SharePoint integration for Search – Microsoft SharePoint® users can also search SharePoint project sites directly from Newforma Project Center. By selecting “SharePoint” as the search location on the Search menu, Newforma will retrieve and display documents and files from the SharePoint project site that contain the matching search term. Project-specific blogs, wikis and threaded discussions maintained in SharePoint may also be accessed and searched via Newforma Project Center.



My Project Center – **My Project Center** provides a single point of access to a customized list of your projects (which is used throughout the application) as well as to the firm's complete portfolio of active projects, archived projects and project opportunities. The Project Activity Summary displays a broad cross-section of project metrics as each project is selected, including current open items; a chart of historical trends in project activity; up-to-date financials from programs like Deltek Vision; and a list of most recently modified files. The Summary display is configurable to individual user needs. Lastly, team members can generate a series of reports for one or more selected projects from My Project Center to track My Open Items, RFIs, submittals, action items, transmittals, email and markups.



Project Home – **Project Home** displays activity centers from which project team members can conduct common AEC work processes such as sending transmittals; managing submittals; creating, sharing and organizing markups; managing action items and more. You can even configure Project Home to display shortcuts to your commonly used applications and links to websites of your choice.



Project Files – The **Project Files** activity center establishes a project context for files, allowing access to all folders and documents related to the current project from one place on your desktop, no matter where the files reside on the network. It allows easy browsing and searching, dramatically reducing the time needed to find critical project information. The software identifies duplicate files and missing or incorrect external references. You can cut, copy, paste, delete or rename files just as in Windows Explorer, all without leaving Newforma Project Center.



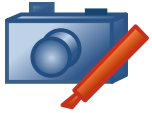
Project Keywords – Keywords can be associated with any email, file or other item created within Newforma Project Center, allowing you to establish a set of global default, or project-specific keywords that can be used to classify and retrieve information about high-value topics. This supplements the content-based search capabilities of Project Search to enable project team members to find project information regarding specific topics. The **Project Keyword** activity center displays a list of all keywords currently in use within a project, allowing the user to browse through the information that has been tagged.



Project Team – The **Project Team** activity center is used to assemble, manage, and group project teams; generate project team reports; and view the ongoing and completed activity associated with individual team members. Most importantly, it facilitates communication between internal and external team members when using functions such as Transmittals, Submittals, Action Items and Newforma Info Exchange. Project Team contact data is stored and managed in a central database on the Newforma Project Center Server; project team members can be added from the database, synchronized with the Exchange Global Address list, imported from Deltek Vision or dragged in from your Outlook Contacts.



Viewer – Newforma **Viewer** allows you to view graphics files and mark them up with easy-to-use annotation and drawing tools. Newforma Viewer opens the file types BMP, DGN, DWF, DWG, DXF, GIF, JPEG, PDF, PLT, PNG and TIFF, and raster images. The file's underlying authoring software, and expertise in that software, are not required. Newforma Viewer markup tools do not alter the original source file; instead, they create a new markup using the underlying source file as a background. Enter search terms in the Find window to zoom to where they appear in the displayed markup.



Snapshot – When working with modeling software such as Autodesk Revit® or Graphisoft® ArchiCAD® software, **Snapshot** functionality allows you to take a picture of the model as it's displayed on your screen, then mark it up. You can then aggregate a sequence of annotated model views into a markup session for review and comment by members of the project team. Similarly, anything that can be displayed on your screen can be captured and marked up, such as results from analysis software or a spreadsheet.



Markup/Markup Sessions – Newforma Project Center users can review, mark up and comment upon project drawings and documents just as you do in a physical redlining process. You can quickly create multiple markups for a CAD drawing or BIM model, link them to action items, stamp them as part of a design or CA review process and then email or transmit them via Info Exchange as bookmarked PDF files to members of the external project team.

Using the **Markup Sessions** activity center, Newforma Project Center users can browse, preview and add comments to each and every markup session created on the project, providing an audit trail of the decisions in a design, submittal or RFI review workflow. After markups have been reviewed and corrections incorporated into the underlying source drawings and models, markup sessions can be closed, but remain a permanent part of the project record. You can also publish multiple markup sessions to PDF and generate markup reports as responses to a multi-sheet design or shop drawing review. Newforma Markup Session functionality also works with markups created by Adapx, Adobe, Bluebeam and Autodesk software.



Project Timeline – The **Project Timeline** activity center enables the team to track and manage important project-specific events ranging from phases, tasks and milestones to meetings, phone calls

and local holidays. You may import and synchronize items from Microsoft Office Project, Microsoft Office Outlook, and Deltek Vision. Importantly, you can associate events with supporting documents and related items like action items. In this way, you can use it to effectively log and track meeting minutes and action items associated with meetings or phone calls. Events can be displayed in either an event log, calendar or journal view.

Project Timeline–Calendar View provides a monthly view of project activities, helping align everyone on both the internal and external teams to a common set of events, tasks and milestones. Newforma Project Center users can file Microsoft Outlook calendar items into the Project Timeline calendar and subscribe to the project calendar to view it in Outlook as well. External team members can also access and subscribe to the project calendar via your Info Exchange website, although you have the ability to control the types of information that external team members can view.

Project Timeline–Journal View displays project events along a linear scale of dates that can be selected in daily, weekly, monthly, quarterly or yearly increments. As date ranges are selected above, the journal below displays a comprehensive list of all project items that occurred during this time range, including project files, emails, transmittals, submittals, RFIs, action items and any other activities. You can filter the list by item type or project team member and adjust the date ranges to refine the list.

The **Event Log** displays project timeline items in a list you can easily sort or filter by team member or type. In this way, it can be used to quickly retrieve phases, milestones, phone logs, meeting minutes and other events on the Project Timeline.



Compare – The **Compare** functionality of Newforma Project Center graphically identifies differences between iterative sets of drawings, eliminating the time-consuming process of manually comparing different

versions. By color-coding additions, deletions and changes, and by providing the ability to animate changes and filter out dimensionally insignificant changes, Compare enables the project team to focus its attention on important coordination issues, and to evaluate the quantity, cost and scheduling impact of design revisions.

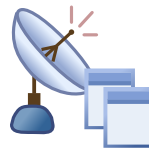
The **Batch Compare** functionality eliminates the time and cost of comparing large drawing sets manually. The software displays color-coded differences between any two folders or document sets you select to compare. Compare functionality can also graphically display the differences between three or more versions of a drawing. A Compare animator shows the transitions between sequential versions of a drawing for a clear understanding of how the design has evolved over time.

When comparing drawing files that are not iterative versions of the same CAD file, you can use **Newforma Digital Light Table** to electronically call out the differences between versions. It color-codes changes between files of different or incompatible origins. For example, use Digital Light Table to see changes between a PDF and a DWF. It displays raster, CAD or PDF files. To present the changes to others, you can generate an animated GIF that shows the transition from the baseline drawing to the revision.



Action Items – The **Action Items** activity center engages the power of the extended project team to identify and manage critical issues, helping to keep your projects on budget and on schedule. Team members can seamlessly create action items while reading and answering email in their email Inbox; while reviewing a drawing, BIM model or PDF in the Newforma Viewer; or from any other activity center in Newforma Project Center. Action Item users can also import items in bulk from spreadsheets created outside of Newforma Project Center. Internal team members can access project action items from a common, central list

and contribute updates or generate reports. External team members receive email notifications for the action items in which they are involved and access the items on the Newforma Info Exchange web site. As the action items are created and completed, the parties involved are notified via email. Any email correspondence, markups or supporting documents associated with the action item can be electronically linked to it, as well, providing a permanent connection and audit trail of all related information.



Newforma® Info Exchange – **Newforma Info Exchange** is an automated and secure means of working with your external team members, allowing the project team to transfer

project information, coordinate distributed CAD or BIM datasets, streamline CA and design review workflows, and gain access to a common set of project phases, tasks, milestones and meetings in a shared project calendar.

File Transfers via Newforma Info Exchange overcome the file size limitations encountered when transferring files via email. Simply select files to be transferred from any activity in Newforma Project Center and designate the recipients. Newforma Info Exchange takes care of packaging the selected files and their external reference files. It posts them to the Newforma Info Exchange website hosted on the Newforma Info Exchange Server within your company's IT infrastructure. Each recipient then receives an email notification containing a link to the Newforma Info Exchange website, from which the recipient securely downloads the file. This same web interface, which you can customize to your company's graphical standards, can be used by external team members to upload files.

Info Exchange Folders are used to coordinate the revisions on referenced CAD or BIM datasets by distributed teams. Simply select a file folder or document set in Newforma Project Center, designate the external participants and publish to a Newforma Info Exchange Folder. External participants will

receive an email with a link to the Newforma Info Exchange web interface where they can download the published files and upload their reference files. Newforma Project Center users can then merge these uploads with the current source files on their network. As work progresses, internal and external team members can seamlessly republish and receive future revisions, ensuring that all members of the design team are working from a common, up-to-date set of coordinated reference drawings and models.

Through a **browser interface**, the Newforma Info Exchange website allows the internal project team members who are not connected to their firm's local area network to view key project information, including email messages filed to the project, and the status of key work processes such as action items, submittals and RFIs.

The same **browser interface** allows external project team members to participate in work processes managed through Newforma Project Center activity centers such as Action Items, Submittals and RFIs. Email logs associated with these items can also, optionally, be viewed via Newforma Info Exchange for messages sent to or from external project team members. Newforma Info Exchange tracks download activity and sends reminders to members who have yet to download files. The Newforma Info Exchange Home page displays the projects to which a team member has access, while the Project Site page shows the team member any open or pending file transfers, RFIs, submittals and action items for the currently selected project.

Finally, Newforma Info Exchange also automates the **administrative functions** that typically plague FTP and extranet sites. Permissions and password security are maintained automatically, and file transfers are automatically removed from the Newforma Info Exchange website on designated expiration dates. Record copies of each file transfer are transparently maintained in a designated project location, allowing users to resend or review the contents of expired transfers, as well as compare them to updated versions, without any IT administrative assistance.



Transmittals – Use the **Transmittals** activity center to create and log transmittals that accompany the exchange of both physical and electronic materials with external project team members. Transmittal forms can be customized to match your company's existing forms or the needs of the project. Transmittals are often created as by-products of other processes, such as file transfers, markup sessions and RFI or submittal responses sent via Newforma Info Exchange or email. The transmittal log consolidates all electronic and physical exchanges into a single view, providing the project team with easy access to every incoming or outgoing transmittal transaction on the project.



Document Sets – The **Document Sets** activity center enables you to organize related project files and folders without duplicating or modifying the underlying file folder structure. Live links to Microsoft Windows folders and advanced file name filtering allow the document set to be dynamically updated as the underlying folder contents change. Team members can then view, mark up and review the document set contents, send them to other project team members, create record copies of document sets at key project milestones, and compare their contents with record copies or updated versions.



Record Copies – The **Record Copies** activity center maintains a ZIP archive of the contents of each and every Newforma Info Exchange transfer and transmittal, submittal or RFI transaction, eliminating the tedious chore of archiving the countless file transfers that occur on a project. Team members can also save record copy archives of document sets or project folders at key project milestones without an associated file transfer or action. All record copies are linked to their source folders, document sets or transactions as **Related Items**, enabling team members to easily discover and retrieve prior versions and use Newforma Compare to visually identify changes between revisions.



Submittals – Use the **Submittals** activity center to log, forward for review, capture reviewer response and respond to submittals. It provides you with the ability to batch-import scheduled submittals from Microsoft Excel®; to accept, reject and forward submittals; to request re-submittals; and to track and report submittal status and history – including submittal-related email exchanges between project team members. You can track and review bundled submittals by line item. Notifications keep project team members on track to assure timely turnaround.

Electronic submittals can be logged through Microsoft Outlook or Newforma Info Exchange, and be reviewed and marked up in Newforma Viewer. You can even insert a user-customizable submittal stamp. A bookmarked PDF can be seamlessly generated, logged and transferred as a submittal response via Newforma Info Exchange or email.



RFIs – An RFI can be logged from an incoming email in Microsoft Outlook, from a filed email message in the Project Email activity center, received via Newforma Info Exchange or simply entered from the RFI activity center. You can forward the RFI to an external consultant, track the progress and due dates of all open RFIs and generate reports showing the status of all RFIs from the RFI activity center. The RFI activity center also tracks any related email correspondence or supporting project files and provides a searchable audit trail for each RFI in the project.

Access to contract administration records

The ability to create or modify contract administration records is limited to named users specifically authorized to process CA information. However, all internal project team members can list, view and report the status of all CA records through view-only access to the submittal and RFI activity centers. All internal project team members can also enter their review responses directly into the CA records for items that have been assigned to them for review.

By default, external project team members can view the status of all CA items in which they are specifically involved via Newforma Info Exchange. External users can, optionally, be granted broader or more restricted access to view CA items based on their role in the project.

Administration and Help features

Newforma Project Center Administration – All key administrative functions of Newforma Project Center have been grouped in an activity center that can, optionally, be hidden from everyday users. Administrative functions include creation or deletion of projects; administration of contact data, Newforma Info Exchange user accounts and file transfers; administration and monitoring of the Newforma Project Center and Newforma Info Exchange Servers; and support for project templates that automate the setup of new projects according to your preferred project settings. During the initial deployment of Newforma Project Center, this project setup process can be scripted to automate the setup of existing active projects and opportunities, as well as archived projects, making them immediately accessible and searchable from within Newforma Project Center. Global administrators may designate project administrators who have authority to modify project settings, reset Newforma Info Exchange passwords, and delete RFIs, submittals, transmittals and action items.



Newforma Support – Newforma Project Center Support offers a broad set of customer support resources. A comprehensive knowledgebase provides a wealth of tips, materials and Newforma-validated answers to technical questions posed live and online. A key part of the knowledgebase is the Customer Support Discussion Forum, where Newforma administrators, Newforma representatives and Newforma consulting partners can address technical questions. Finally, a collection of online tutorials called Take 5's supplement Newforma Training Services with just-in-time learning. The Support activity center also provides contact information for those requiring personal attention.

Common Questions – For new users of Newforma Project Center, or for users exploring new capabilities, the **Common Questions** area on the left of the user interface provides context-sensitive help for the typical questions that might arise at that particular location of the product. Common Questions is an area that can be expanded or contracted from view as appropriate to the needs of the user. Selected Common Questions also provide links to Take 5 video tutorials that give further explanation of key topics.

Send a suggestion – You can send along ideas and feedback from your personal use of Newforma Project Center to the product design team. Sharing your experience can help to shape an upcoming release.

Help – Newforma Project Center provides a comprehensive and searchable Help resource that includes Help Topics, Take 5 video tutorials, new feature summaries and more.

Newformant user community website

Directly accessible via Help or Search from Newforma Project Center, www.newformant.com is an online community for Newforma users. Users can search for guides and tech tips provided by Newforma or other users, post a question to the community, or share product suggestions.

For more information:

View [2-minute conceptual overviews](#) of the key feature areas of Newforma Project Center.

See how to manage email, search across your network, share large files and more using Newforma® Project Center software for project information management.



AEC PROJECT INFORMATION MANAGEMENT

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