
Newforma to Newforma (N2N) Setup Quick Reference Guide

This guide provides a reference for connecting a Newforma Project Center project from your company to a project at another company that uses Project Center.

Purpose

Newforma to Newforma (N2N) enables your company to seamlessly connect to other companies that use Project Center to streamline the coordination and exchange of critical project information. N2N uses a direct, secure communications channel between Project Center Servers and Info Exchange Servers within each company's corporate firewall.

Audience

Project Center administrators at the partnering companies.

Key Features

- Connect two companies via N2N
- Connect company projects

Notes

- The Project Center administrators from each company should perform the following procedures on the phone.
- Before connecting with Newforma to Newforma, partnering companies should enter into a trusted business relationship providing for the level of transparency required of the project information being shared.
- You must know the URL of the Info Exchange Server of the company you are connecting to.

To connect two companies

It takes two consenting companies to complete an N2N connection. This section describes the steps required for a company (Company A) to initiate the connection and the corresponding steps that the other company (Company B) must take to confirm the connection.

1. Before initiating a connection, the administrator at Company A needs to know the URL of Company B's Info Exchange Server and the email address of the Project Center administrator at Company B.
2. The company initiating the connection (Company A) must open the **Project Center Administration activity center** by clicking **Project Center Administration** from the **Tasks** panel of the **My Project Center activity center**, or from the **Activities** list.
3. Click the **Companies** tab, then select the name of the company you want to connect to.

If you first need to add the company to Project Center, refer to the [Add Company dialog box topic](#).

4. Click **Newforma to Newforma > Send Connection Request** from the **Tasks** panel to open the **Send Connection Request dialog box**:

The screenshot shows the 'Send Connection Request' dialog box. The 'Company Name' is set to 'ColoNIX'. Under 'Select Connection:', the radio button for 'Another Newforma Project Center' is selected. Below this, there is a text input field for 'Info Exchange Server address' and a 'Verify' button. The 'Newforma Project Cloud' option is unselected. An 'Important' note states: 'You are initiating a direct, secure communication channel with ColoNIX. If you haven't already, you should consider entering into a trusted business relationship with ColoNIX that provides for the automated and transparent exchange and coordination of project information.' Below the note, it says 'Next Step: After selecting OK, send the email that is automatically generated to the company.' At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.

5. Enter the URL of Company B's Info Exchange Server in the **Info Exchange Server Address** field, as shown above. Click **Verify** to confirm the connection, then click **OK**. This generates an email message containing a link that the recipient at Company B will use to verify the connection.

You can get the URL from the link embedded in an Info Exchange email notification from the company you are connecting to.

6. When the email message opens, enter the email address of the contact who will be confirming the connection request at Company B and click **Send**.

7. Company B: The recipient of the connection request must open the email message and click **Link My Company** to complete the connection request, as shown here:

Send

From: [Redacted]

To: [Redacted]

Cc: [Redacted]

Subject: **Newforma** Company Connection Request

Greetings,

A company that you work with, Newforma - Harrison, is also using a Newforma product to manage their Projects. By responding to this email you can receive Shared Folders, RFIs, Submittals and other items directly in your Newforma Project, eliminating the need to download or retype information. All activities continue to be logged in your Newforma Project.

To get started, click the link below.

[Link My Company](#)

No email message is returned to the contact at Company A who initiated the request.

8. In the following dialog box, the recipient must click the appropriate link to select whether to **Open in Newforma Project Center** or **Open in Newforma Project Cloud**.



You have been directed here from a Newforma email link. Please choose which Newforma product your company is using from the list below:

Your Newforma Project Links

[Open in Newforma Project Center »](#)

[Open in Newforma Project Cloud »](#)

Having trouble? [Click here for more information.](#)

This page can be closed after you have made your selection.

9. Company B: When the **Confirm Integration Request dialog box** opens (as shown below), the contact at Company B who is responding must verify that the company name in the **Matching Company** field is correct, then click **OK**.

*If Company A is not automatically selected in the **Matching Company** field, the recipient at Company B needs to click **Browse** to locate and select Company A.*

Confirm Integration Request

[Redacted] sent you a request to exchange company information in order to setup a link between your Newforma Project Center installations.

Requesting Company Name: [Redacted]

Requesting Info Exchange Server address: [Redacted]

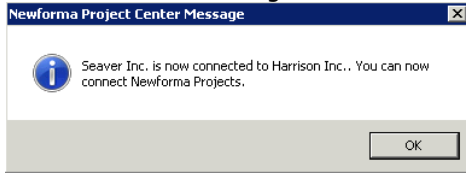
Select the Company in your Newforma Company list that matches the requesting company.

Matching Company: [Redacted]

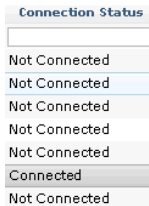
*A company with the same name was preselected.

Important: This action will establish a direct, secure communication channel with [Redacted]. If you haven't already, you should consider entering into a trusted business relationship with [Redacted] that provides for the automated and transparent exchange and coordination of project information.

A confirmation message similar to the following appears when the connection is complete:



10. The connection appears as **Connected** in the **Connection Status** column of the **Project Center Administration activity center Companies tab** at both companies, as shown here:

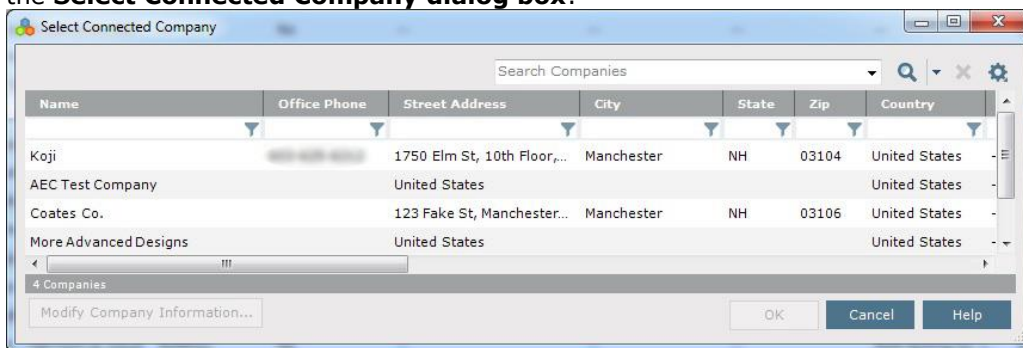


To connect company projects

This procedure can be done at either of the connected companies. The two companies must be connected before performing this procedure, as described in the procedure above.

Both of the projects must be available on Info Exchange.

1. Initiating company: If you are not already there, open the **Project Center Administration activity center** by clicking **Project Center Administration** from the **Tasks** panel of the **My Project Center activity center**, or from the **Activities** list.
2. Click the **Projects** tab.
3. Select the project you want to connect to another company's project.
4. Click **Newforma to Newforma > Connect with Another Company's Project** from the **Tasks** panel to open the **Select Connected Company dialog box**:



5. Select the company whose project you want to connect to and click **OK**. The following confirmation message opens, which contains information about the connection. Click **Yes** to continue.



6. Open the email message (as shown below) and enter the email address of the contact who will be confirming the connection request and click **Send**.
7. Recipient company: The company receiving the connection request must open the email message and click **Select a Matching Project and Complete the Connection** to select the project to connect to and complete the connection, as shown here:

Greetings:

A company that you work with, Bangor Architects, is also using Newforma Project Information Management application and would like to connect their Newforma project to your Newforma project.

Click on the link below to complete the connection.

[Select a matching project and complete the connection](#)

Sender's Project Name: 20010601-School of Arts & Aesthetics RENAMED
 Sender's Project Number: 20010602
 Sender's Project Server: colonix.newforma.com

Notification generated by [Newforma Project Center](#)

8. In the following dialog box, click the appropriate link for your company: **Open in Newforma Project Center** or **Open in Newforma Project Cloud**:



You have been directed here from a Newforma email link. Please choose which Newforma product your company is using from the list below:

Your Newforma Project Links

 [Open in Newforma Project Center »](#)

 [Open in Newforma Project Cloud »](#)

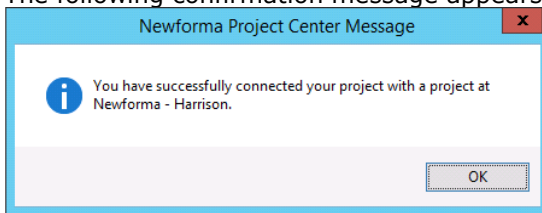
Having trouble? [Click here for more information.](#)

This page can be closed after you have made your selection.

9. When the **Confirm Project Connect Request dialog box** opens (as shown here), the recipient company must click **Browse** next to the **Associated Project** field to open the **Select a Project dialog box** to locate and select the corresponding project. Click **OK** when finished.

Mark the **Reply to Sender with a Confirmation Email** checkbox to send an email message to the contact who initiated the request.

The following confirmation message appears when the project connection is complete. Click **OK**.



The email sent to the initiator will be similar to the following:

Greetings:

Your connected project request has been accepted. You are now ready to share information.

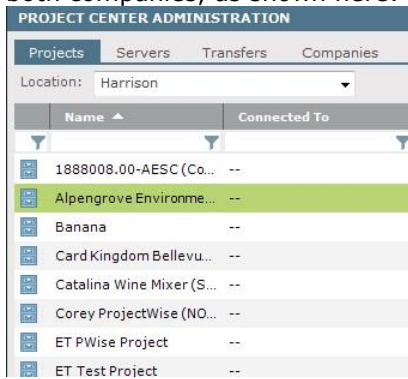
[Open the connected project](#)

Company: Newf
Project Name: School of Arts & Aesthetics
Project Number: 20010601

Company: Newforma QA
Project Name: 20010601-School of Arts & Aesthetics RENAMED
Project Number: 20010602

Notification generated by [Newforma Project Center](#)

10. The projects are now connected and the connected company's name is listed in the **Connected To** column at both companies, as shown here:



The screenshot shows the 'PROJECT CENTER ADMINISTRATION' interface. At the top, there are tabs for 'Projects', 'Servers', 'Transfers', and 'Companies'. Below the tabs, there is a 'Location' dropdown menu set to 'Harrison'. The main area contains a table with two columns: 'Name' and 'Connected To'. The table lists several projects, with 'Alpengrove Environme...' highlighted in green. The 'Connected To' column for all listed projects shows '--'.

Name	Connected To
1888008.00-AESC (Co...	--
Alpengrove Environme...	--
Banana	--
Card Kingdom Bellevu...	--
Catalina Wine Mixer (S...	--
Corey ProjectWise (NO...	--
ET Pwise Project	--
ET Test Project	--