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**:

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:

> *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**.

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.*

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

Newforma Project Center Message ☒

ℹ️ Seaver Inc. is now connected to Harrison Inc.. You can now connect Newforma Projects.

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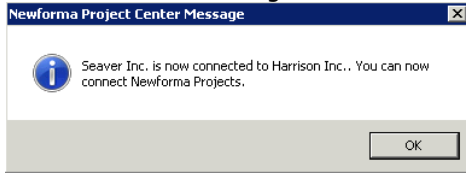
10. The connection appears as **Connected** in the **Connection Status** column of the **Project Center Administration activity center Companies tab** at both companies, as shown here:
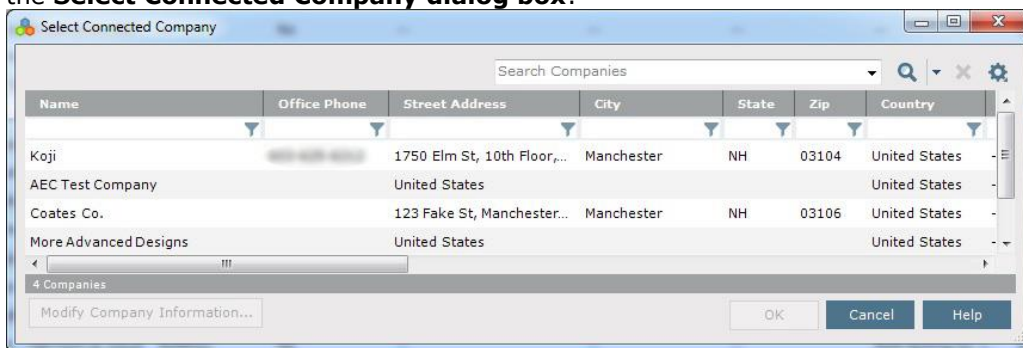
Connection Status

Not Connected
Not Connected
Not Connected
Not Connected
Not Connected
Connected
Not Connected
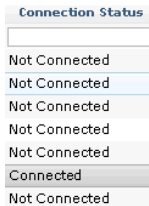
To connect company projects

> *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**:

Select Connected Company   ▢ ▣ ✕

Search Companies ▾ 🔍 ▾ ✕ ⚙

Name	Office Phone	Street Address	City	State	Zip	Country	
Koji		1750 Elm St, 10th Floor,...	Manchester	NH	03104	United States	
AEC Test Company		United States				United States	
Coates Co.		123 Fake St, Manchester...	Manchester	NH	03106	United States	
More Advanced Designs		United States				United States	

4 Companies

[Modify Company Information...]   [OK] [Cancel] [Help]

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:

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

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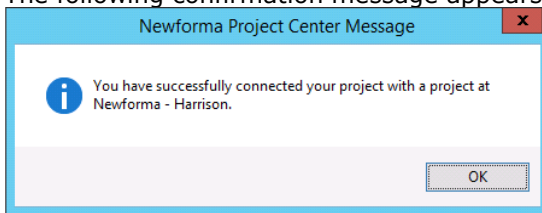
The email sent to the initiator will be similar to the following:

Greetings:

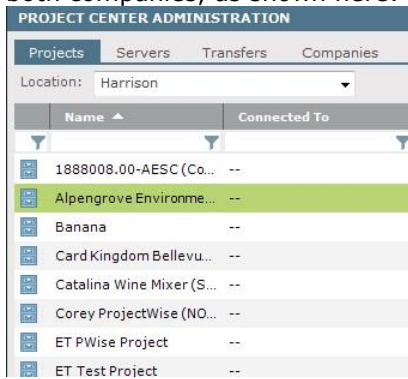Your connected project request has been accepted. You are now ready to share information.

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: