Newforma Project Information Link Quick Reference Guide

This topic provides a reference for **Newforma Project Information Link**.

Purpose

Newforma Project Information Link enables you to make a connection between your Revit® models and elements and Newforma building models and elements and other project information. Once the links are created, you can synchronize information back and forth between Newforma Project Center and Revit.

Audience

Internal project team members.

Key Features

- **Newforma Project Information Link** connects Revit models and elements to Newforma project information.
- See and track your list of registered Revit models and elements in the **Newforma Building Models and Elements** activity center.
- Sync elements, spaces, and record documents from Revit into Newforma Project Center and edit extended properties.
- Mass update elements, spaces, and record documents data using Newforma's **Edit in Spreadsheet** tool, then sync changes back to Revit.
- Create action items and markups linked to a Revit model.

Register an Autodesk® Revit Model

Before you can connect your Revit model to project information inside Project Center and sync data back and forth, you must register your models within Project Center. You can register multiple models with a single Newforma project. The two options for registering your models are explained below.

> *When registering an Autodesk Revit model, it is best to utilize a central model since it functions as the central organizing model for all team members.*

**Option 1: Register a model from Project Center:**

1. To register a model from within Project Center, go to the **Building Models and Elements** activity center and select **Register Model** from the **Tasks** panel.
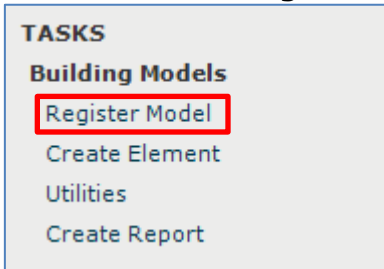
2. Fill in the **Name**, and browse to locate the **Model File** in the **Register Building Model dialog box**. Fill in any other information as desired and click **OK** to save.
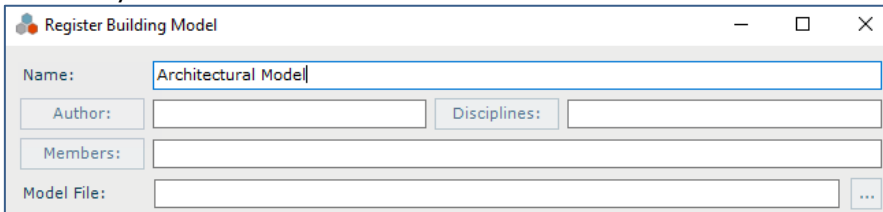
**Option 2: Register a Model from within Revit:**

1. To register a model from within Revit, select **Register Model** on the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon, and select the project. The model record is automatically created, linked to the model, and appears in the **Building Models and Element**s activity center.
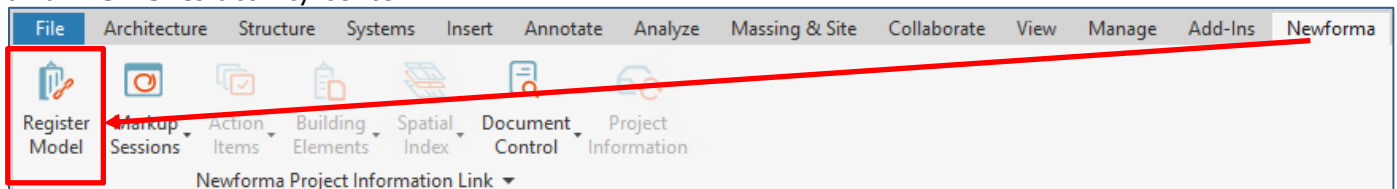
Synchronize Newforma Elements

Newforma elements are used to organize and track information related to objects in your models and can be seen in the **Building Models and Elements** activity center. Elements can be any building component such as windows, walls, piping, or room tags. Once the elements are created in Newforma you can use various tools to mass update information, and then sync those changes back to Revit.

1. To synchronize elements from Revit to the **Building Models and Elements** activity center in Project Center, go to the **Newforma Project Information Link** add-in, located on the Newforma portion of Revit's ribbon, and select **Building Elements > Synchronize Elements**.
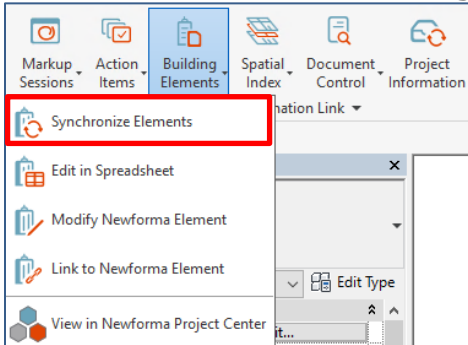

2. In the **Synchronize Building Elements dialog box**, click **Add Revit Elements** to select the elements you want to synchronize.
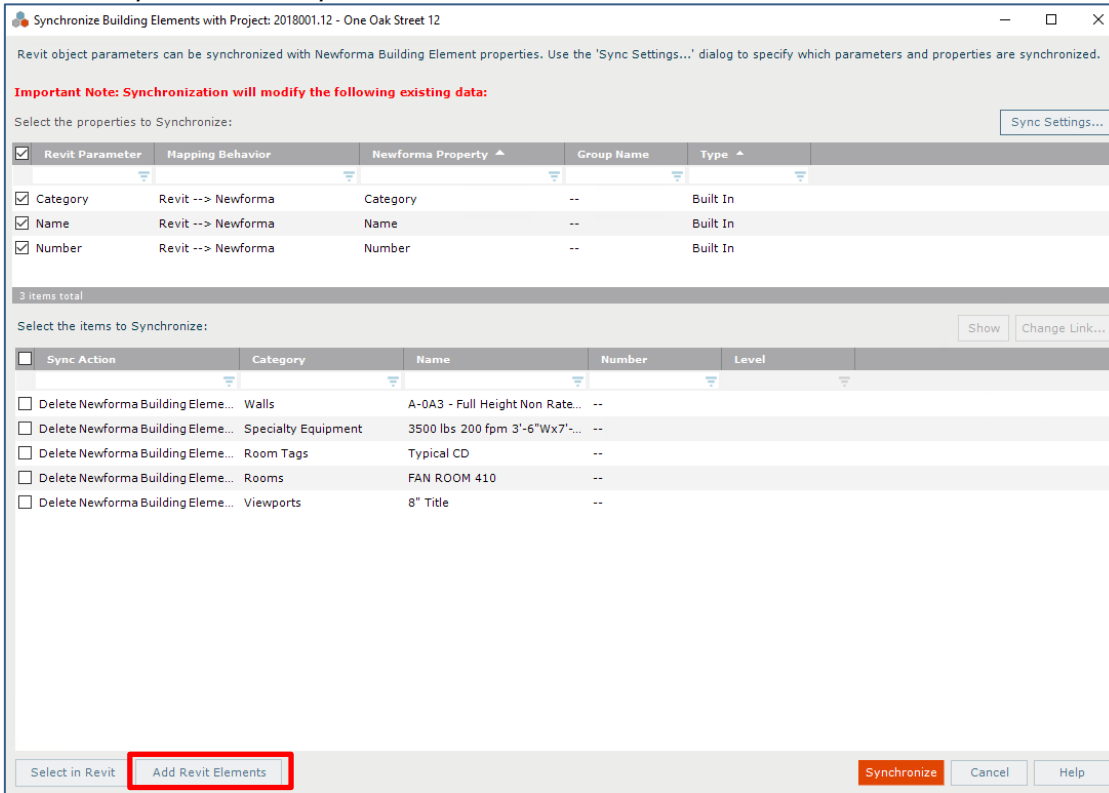
3. Select individual elements in the model or drag to select multiple elements. Once you've selected the elements you want, click **Finish**.
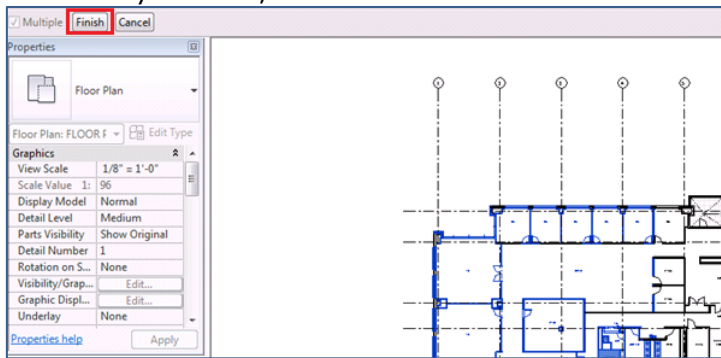

4. The selected elements appear in the **Synchronize Building Elements** dialog box. Use the column filters to isolate the elements you want, then mark the checkboxes of the items you want to synchronize. To create additional matching extended properties between Revit and Newforma Project Center, click **Sync Settings**.
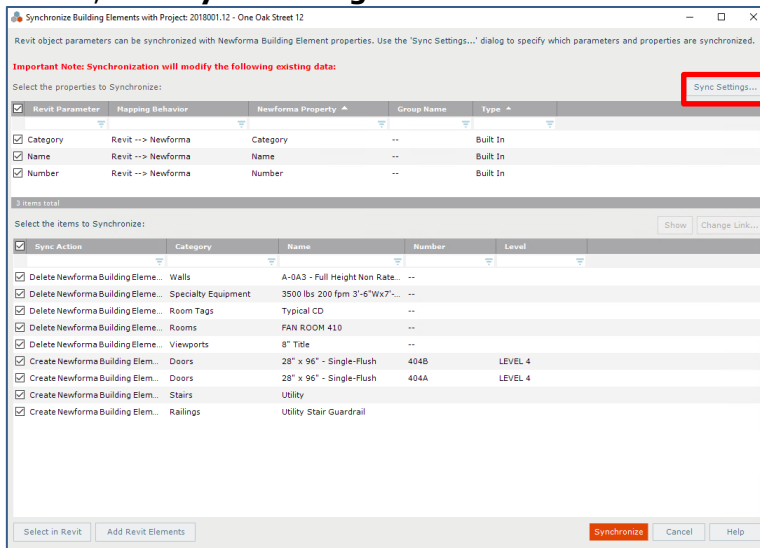
5. Highlight the Revit property and click **Create Matching Extended Property**. The property is created.
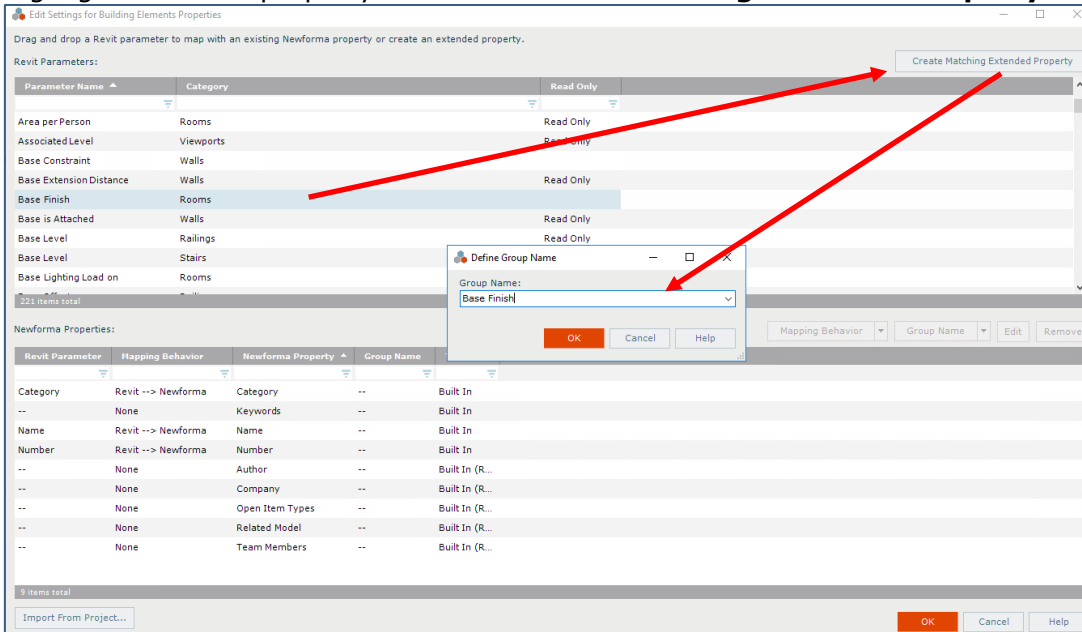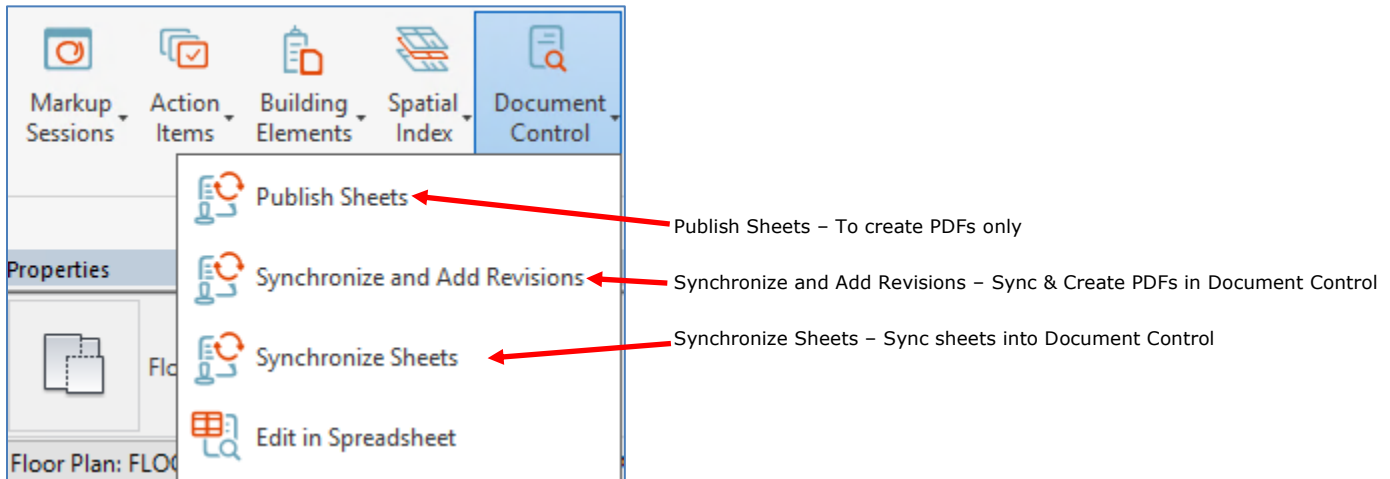

6. Select the group for the extended property and select **OK**. You will now see the new element in the **Items to Synchronize** list.
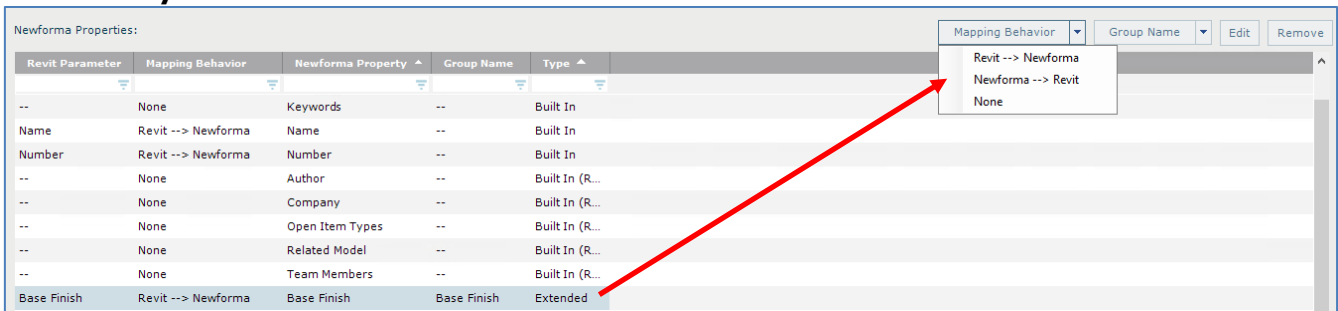
7. Use the edit buttons to edit any Newforma properties. Select **OK** when complete. The Elements appear in the **Building Models and Elements** activity center.

Create Record Documents and PDFs from Sheets in Revit

You can easily create record documents and attach PDFs in the **Document Control** activity center from the sheets in Revit. Once the record documents are created and the files are attached, you can track revisions and issuance of your important construction documents.


Publish Sheets – To create PDFs only

Synchronize and Add Revisions – Sync & Create PDFs in Document Control

Synchronize Sheets – Sync sheets into Document Control

To publish sheets to PDF(s)

1. To create PDFs from Revit, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Document Control > Publish Sheets**.
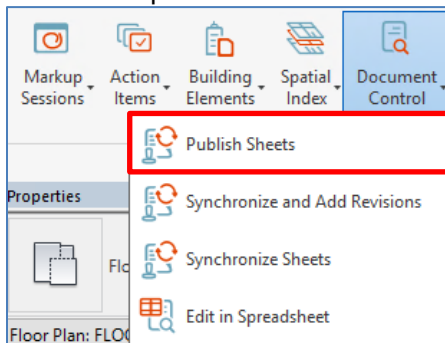
2. Select **Add Revit Parameters** if there is a need to include custom Revit parameters for custom sorting of a multi-page PDF.
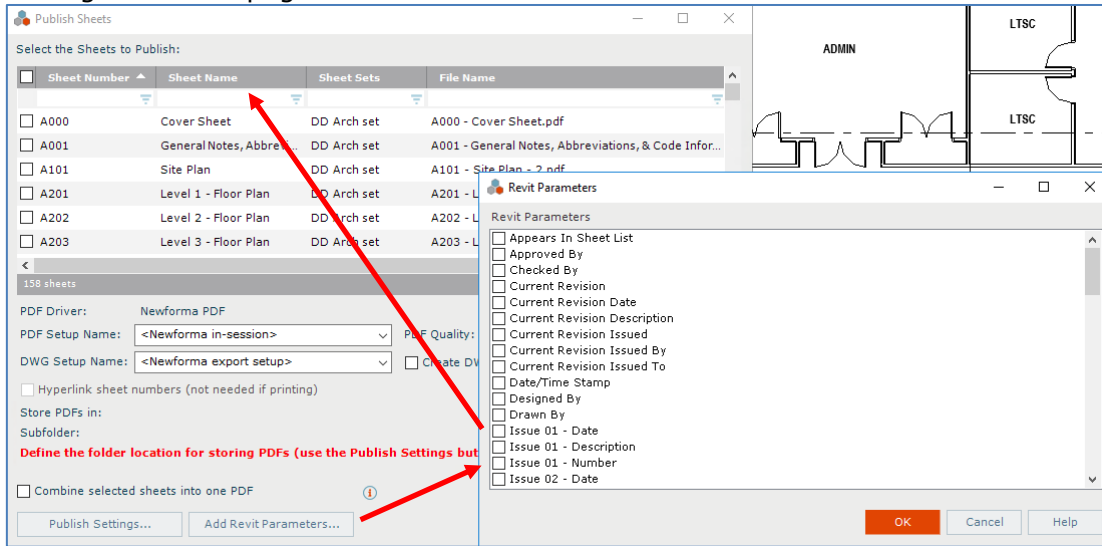
3. Select **Publish Settings** to control PDF print location, print driver settings and PDF naming conventions.
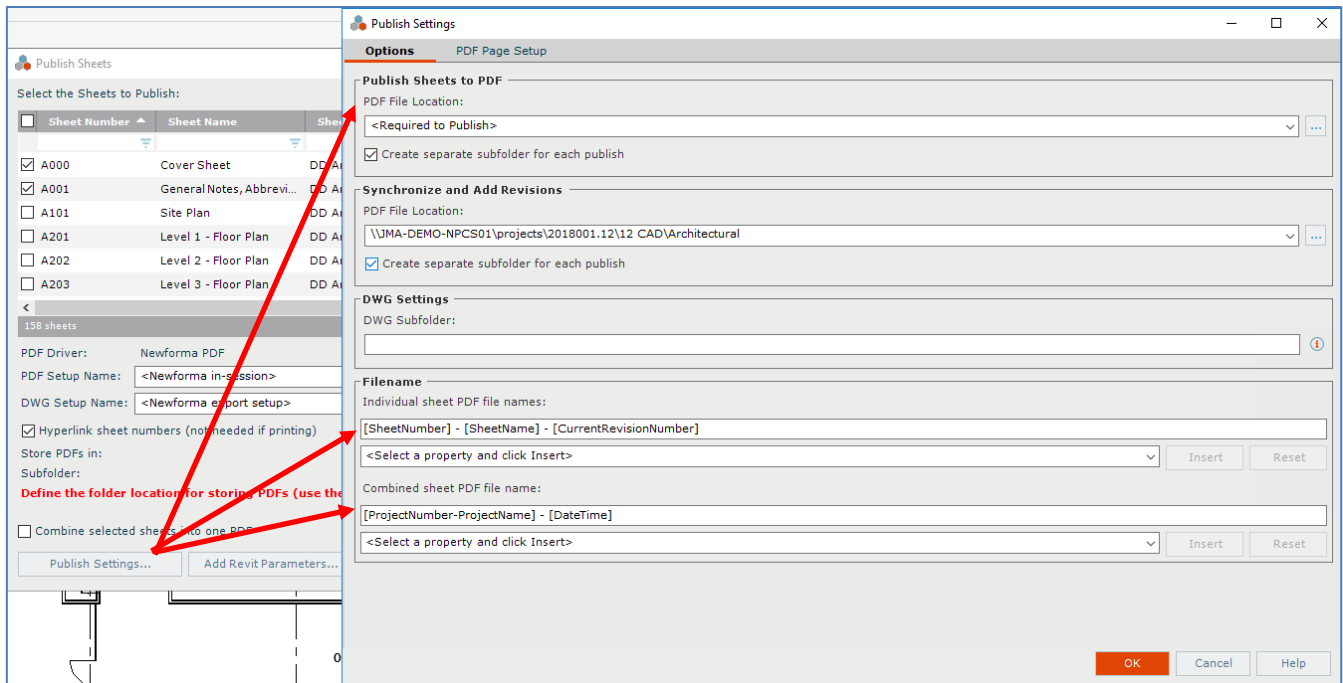
4. Control the naming of Combined PDFs (similar to individual PDF files). The name may also contain hard coded information.

```
Combined sheet PDF file name:

[ProjectNumber-ProjectName] - [DateTime]

<Select a property and click Insert>
<Select a property and click Insert>
--- Revit Parameters ---
[CurrentRevisionDate]
[CurrentRevisionNumber]
--- Newforma Properties ---
[ProjectName]
[ProjectNumber]
[ProjectNumber-ProjectName]
--- File System Properties ---
[Date]
[Time]
[DateTime]
[Day]
[Month]
[Year]
```
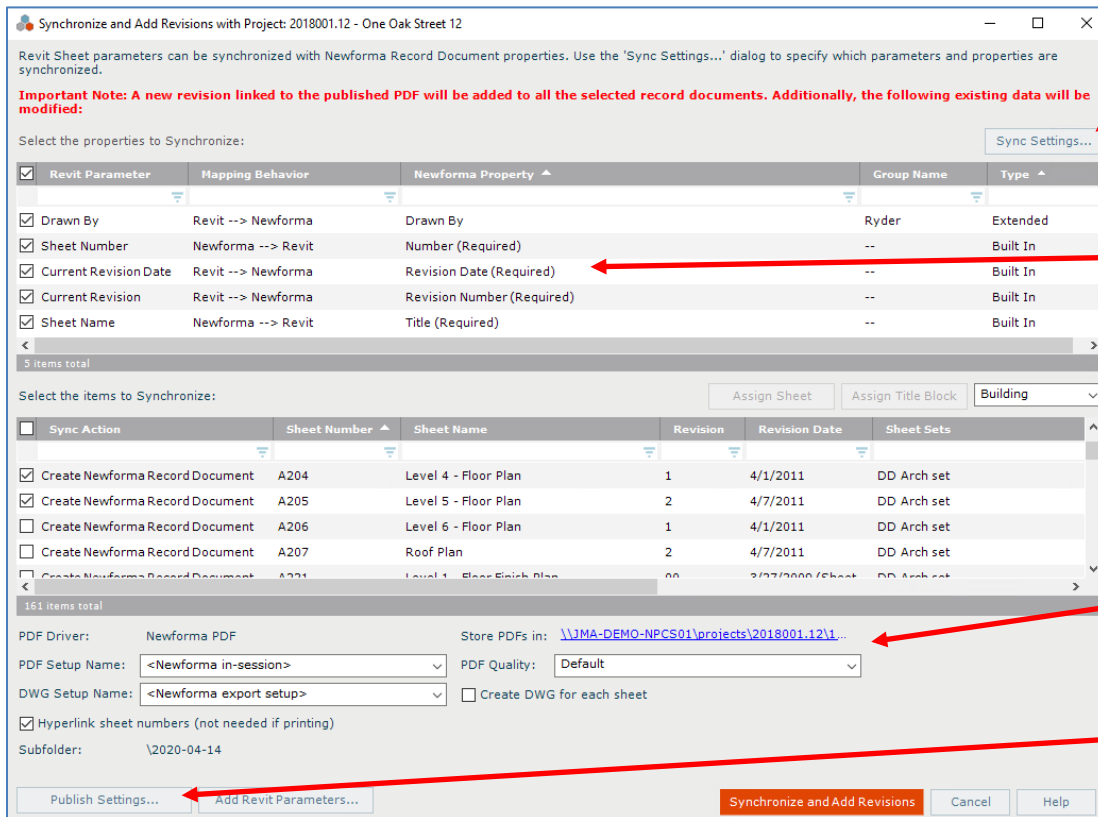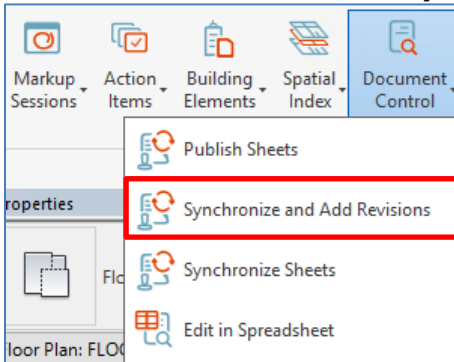
5. Click **Publish** to publish the sheets to PDF.

To synchronize sheets and publish PDFs

The Synchronize and Add Revisions process described here is the recommended method for synchronizing revision data, as it is specifically intended to be used for synchronizing revision data between Revit and Project Center.

1. To sync and create PDF sheets from Revit to create Newforma record documents, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Document Control > Synchronize and Add Revisions**.

2. After changing any needed settings, select **Synchronize and Add Revisions** in the **Synchronize and Add Revisions dialog box** to synchronize sheets and create PDFs.

3. The record documents appear in the **Document Control** activity center along with the linked PDFs.

DOCUMENT CONTROL - ONE OAK STREET 12 (2018001.12)			
Select View	**All Active Record Documents (5)**		
	Number ▲	**Revision Description**	**Revision State**
All Packages			
All Record Documents	⊞ 🅰 A000		Draft
	⊞ 🅰 A001		Draft
	⊞ 🅰 A101		Draft
	⊞ 🅰 A204		Draft
	⊞ 🅰 A205		Draft

To synchronize sheets

*It is recommended that you do **NOT** synchronize revision data using **Synchronize Sheets**, as this could cause data inconsistencies between Revit and Newforma. To synchronize revision data, use **Synchronize and Add Revisions**, as it is specifically intended to be used for synchronizing revision data between Revit and Project Center.*

This option synchronizes only the sheet data from Revit to Document Control. This function does not publish PDFs.

1. To sync sheets from Revit to create Newforma record documents, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Document Control > Synchronize Sheets**.
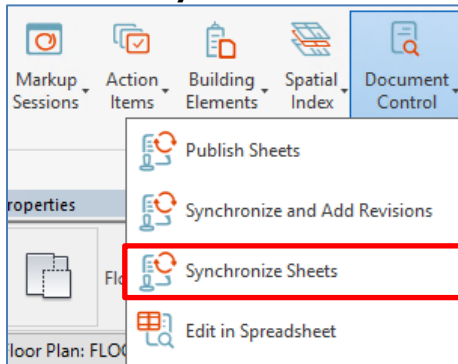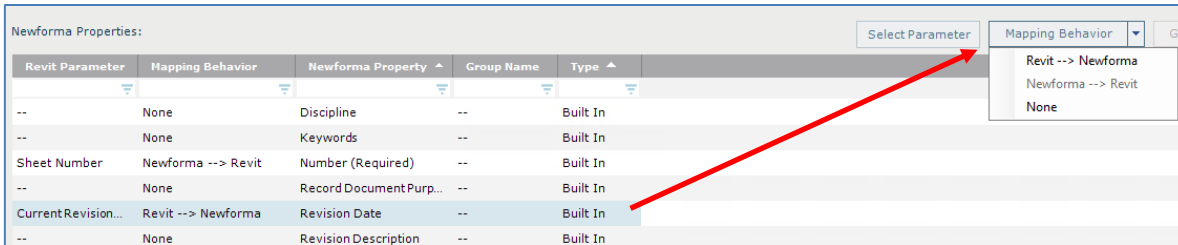

2. In the **Synchronize Sheets dialog box**, click **Sync Settings** to create extended properties to be synchronized. The **Edit Settings for Document Control Properties dialog box** opens:
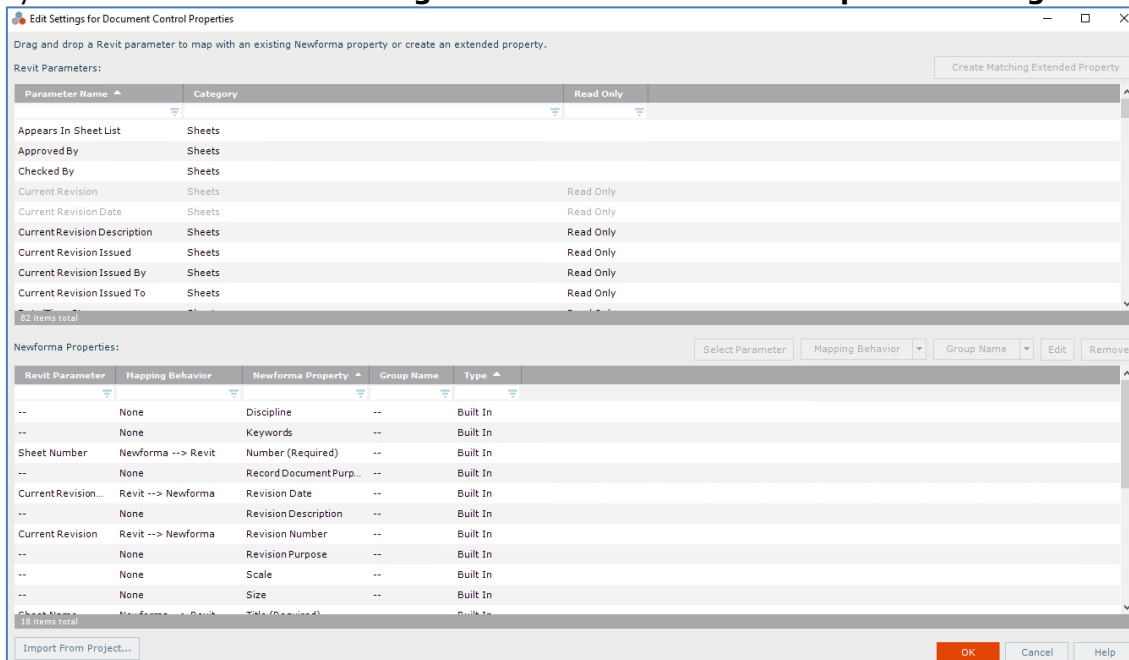
3. Highlight a Revit property and click **Create Matching Extended Property** to create a corresponding Newforma property.
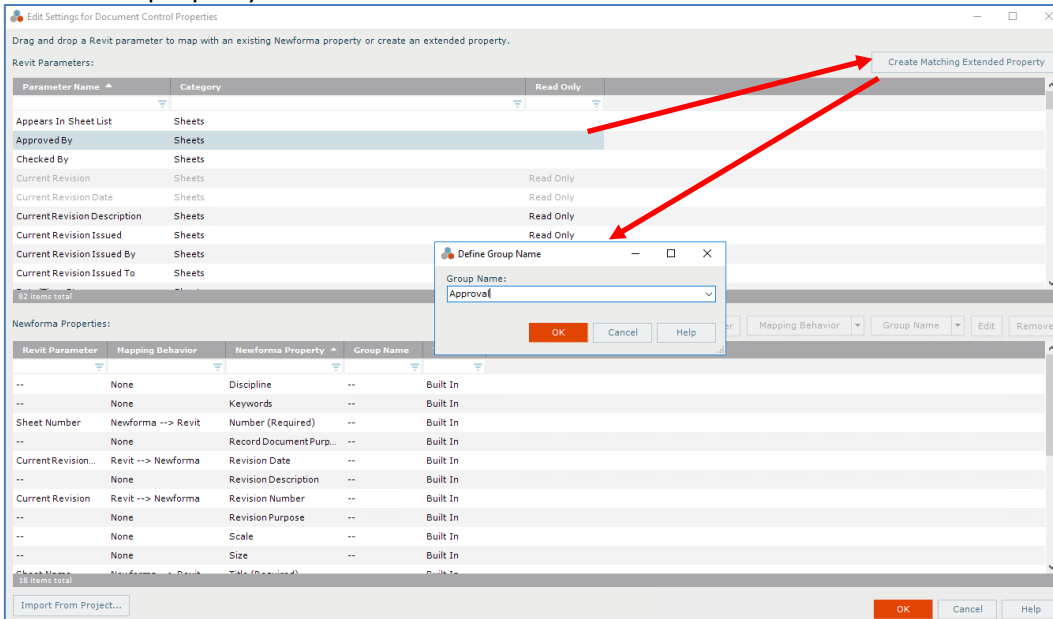
4. Highlight the Newforma property to change options such as **Mapping Behavior** and **Group Name**. Click **OK**.

5. In the **Synchronize Sheets dialog box**, review the information and select the items you want to sync, then click **Synchronize** to create the record documents.
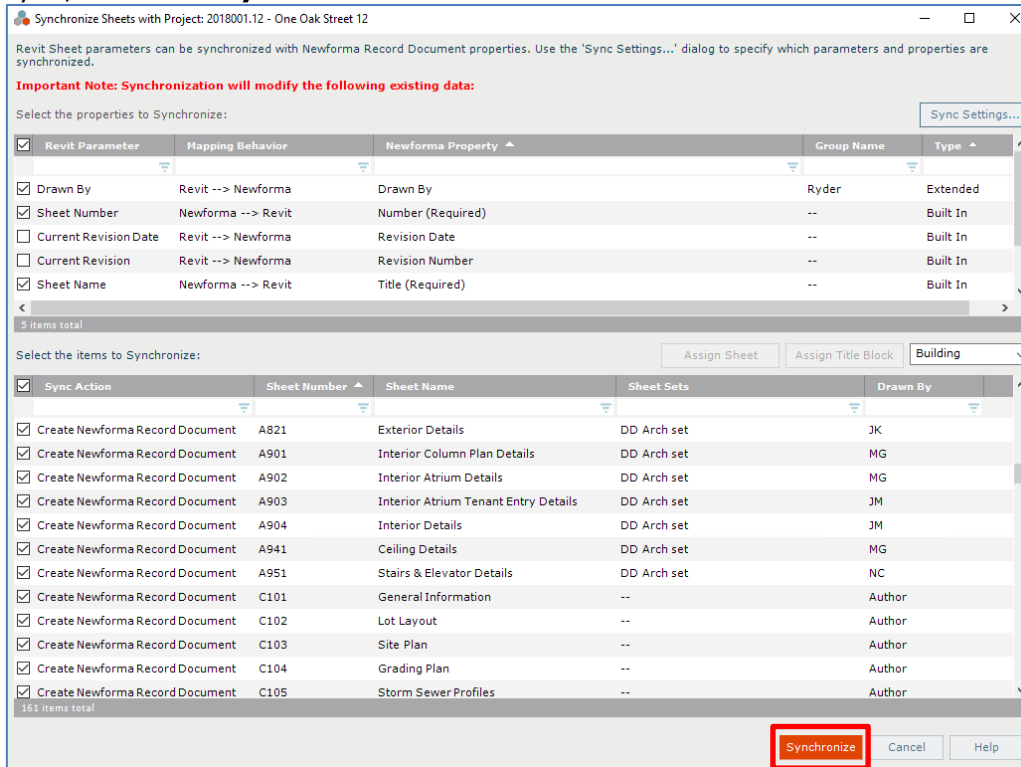
Create Newforma Spaces

You can take Revit rooms and areas and sync them to Newforma to create spaces in the **Spatial Index** activity center. Spaces are needed in Newforma if you plan to use the Punch List app. In addition, you can easily mass update items like finishes and other properties once they are in Newforma, then sync that data back to Revit.

1. To sync spaces from Revit, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Spatial Index > Synchronize Spaces**.
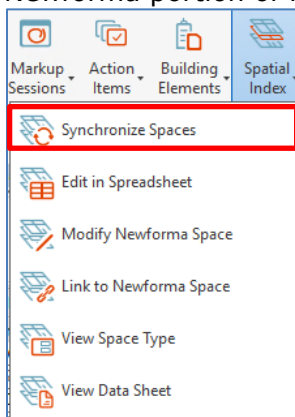
2. In the **Synchronize Rooms, Spaces, and Areas dialog box**, click **Sync Settings** if you want to add, edit or remove any extended properties as described above. Click **OK** when done.
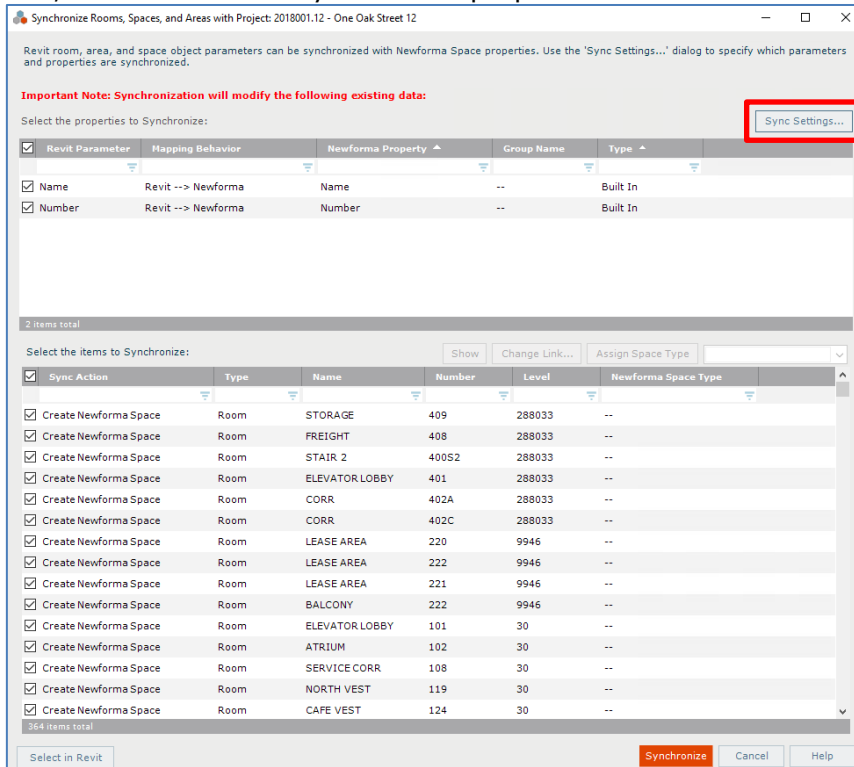
3. Use the column filters to isolate the spaces you want, then mark the checkboxes of the items you want to synchronize. Click **Synchronize**.

4. The spaces appear in the **Spatial Index** activity center.

Use Edit in Spreadsheet to Mass Update Elements, Sheets, or Record Document Data

You can use the **Edit in Spreadsheet** task in Newforma when editing elements, sheets, or record documents to utilize Excel's streamlined copy/paste functionality to expedite editing. You can also utilize formulas within Excel to quickly generate various calculated totals. This tool is especially helpful if you want to utilize office staff to edit element, sheet, or record document data who may not be well versed in Revit.

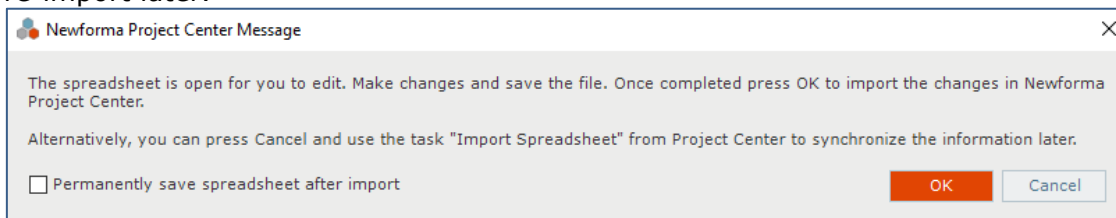> *The **Edit in Spreadsheet** task can also be run from the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon.*
>
> *If you are using **Synchronize and Add Revisions** to synchronize record document data between Revit and Newforma, you should **NOT** also edit record document data in a spreadsheet. Mixing synchronization methods can cause data misalignment for your record documents.*

1. To mass update space data, go to the **Spatial Index** activity center and select **Edit in Spreadsheet** from the **Tasks** panel.

   TASKS
   Spatial Index
   Create Space
   Create Space Type
   Edit in Spreadsheet
   Utilities
   Create Report
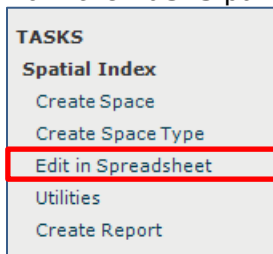
2. When prompted, navigate to a location in which to save the exported data. After saving the file, it opens in Excel. Edit the data as desired, then save and close the file. A message appears prompting you to click **OK** to re-import the modifications. If you are not ready to import changes, click **Cancel** to re-import later.

   Newforma Project Center Message ✕

   The spreadsheet is open for you to edit. Make changes and save the file. Once completed press OK to import the changes in Newforma Project Center.

   Alternatively, you can press Cancel and use the task "Import Spreadsheet" from Project Center to synchronize the information later.

   ☐ Permanently save spreadsheet after import   OK   Cancel

Add Action Items from Revit Model

If you are working in a Revit model and want to add a to-do item for yourself or someone else, it is easy to add an action item. Once added, it can be accessed from Newforma in the **Action Items** activity center.

1. To add an action item, go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Action Items**, then one of the following:

   - Select **Identify** if you want to add an action item related to the model in general; or
   - Select **Identify for Element** if you want to add an action item related to a specific element.
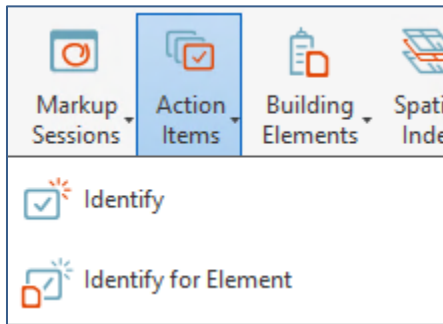
2. Fill out the action item details as desired in the **Identify Action Item dialog box**. Modify the **Subject** if needed. If you know who to assign the item to, fill out the **Assigned To** field, or it can be assigned later. Add any details in the **Description** as needed. Note the model appears on the **Related Items** tab. Select **Create** when done.


3. If the action item is assigned, and the **Send change notification email** box is checked, an email is created. Review the email and click **Send and File in Action Item** to send it.

Create Newforma Markup Sessions from Revit Model

You can use the Newforma Markup tools while working in a Revit model. Once added, markups can be accessed from the **Markup Sessions** activity center.

1. To mark up a drawing, zoom into the area of the drawing you want to markup. Go to the **Newforma Project Information Link** add-in located on the Newforma portion of Revit's ribbon and select **Markup Sessions**, then one of the following:

   - Select **Markup Snapshot** if you want to do a markup related to the model in general; or
   - Select **Markup Snapshot of Element** if you want to do a markup related to a specific element.
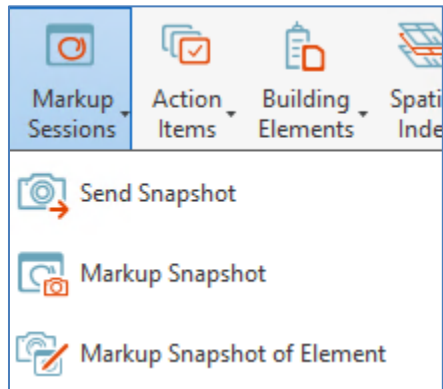
2. Click and drag the **Newforma Snapshot** camera to select the rectangular area you want to capture for the markup. It appears in the **Newforma Viewer**. Use the markup tools to mark up the drawing.
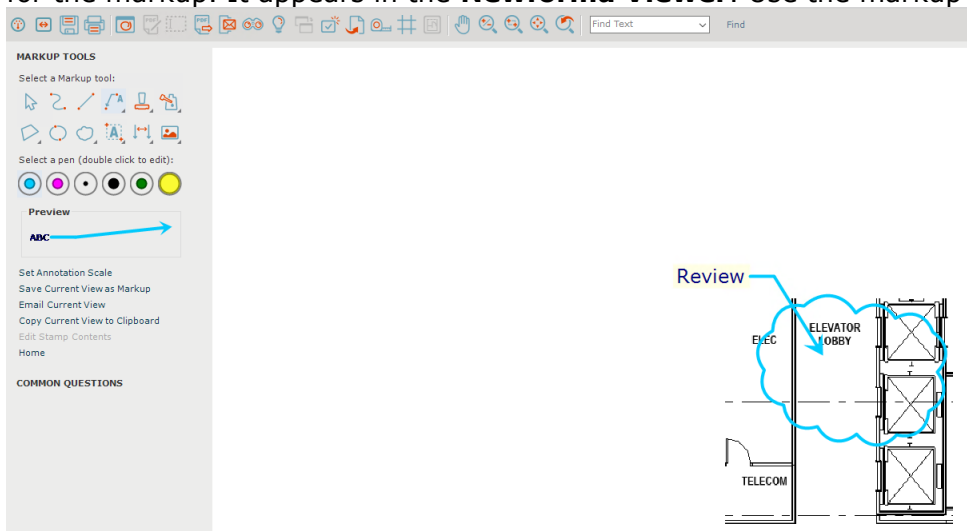
3. To save a markup session in Newforma, click **Save**. Modify the **Name** and/or add **Remarks** if desired in the **Save Markup Session As dialog box**. Note that the model appears on the **Related Items** tab. Click **OK** when done.