

## Mission of Learning

Newforma Learning & Development offers courses designed for everyone on your project team – from new users to global administrators. Your firm will see immediate results in productivity and increased organization of project information with Newforma® Project Center after the very first training session. We also recognize that learning is best achieved in stages. Once a skill set is mastered, that knowledge becomes the foundation for the next level of attainment. Your Newforma Training Consultant will discuss with you a best practice path to ensure that the goals of your team are most efficiently met.

Along with instructor-led courses, Newforma also offers on demand learning with interactive learning modules and brief video tutorials so your users can learn when and where is best for them.

## Training Formats

Newforma understands that schedules are hectic and team members are often remotely located; therefore, we offer flexible training formats to fit the needs of your team. You can select the training environment and format that works best for your team, including on-site instruction in hands-on or presentation format or live web-based training.

### Hands-on Onsite Training

Hands-on training sessions create a comprehensive learning experience as they offer the opportunity for students to practice all the presented features and functions. In order for the Training Consultant to best monitor progress, these sessions are limited to (15) students per session.

### Presentation Onsite Training

Presentation style instruction allows for many people to be trained at the same time. Students are encouraged to begin using the software as soon as possible following the training. If time allows, the Training Consultant can circulate the office answering questions and making sure users are getting started successfully.

### Instructor-Led Remote Web Training

Remote web-based training offers the flexibility of training many users in multiple locations at the same time. Newforma remote training sessions are conducted using tools designed specifically for web-based training. They are also recorded so users who could not attend live can still benefit from the training.

### Online eLearning

[Newforma University](#) offers more than 40 eLearning courses, covering every aspect of Newforma, from Project Center, to Contract Management and beyond. Some course are interactive allowing users to test their knowledge. A training history is available for complete courses to help users measure their progress.

### Video Tutorials

If tracking completion of eLearning courses it not needed, a library of brief, on-demand video tutorials is also accessible from [Project Center Help](#).

### Newforma Project Center Instructor-Led Training Courses

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#### Training for New Users

*New users should participate in NPC 100, NPC 110, and NPC 111*

#### **NPC 100: Basics of Newforma Project Center – up to 60 minutes**

This training will quickly get new users started using Newforma Project Center by learning the basics of navigating project files, using project search, using the Newforma Viewer for basic markup and how to file emails to projects.

- Add projects to the My Projects tab and understand basic navigation in Newforma Project Center.
- Navigate Project Files.
- Search for files and other internal project information, including project email and attachments for all projects.
- Electronically view and mark up files, how to create PDF's of marked up files, and how to save a markup session.
- File emails to projects and understand the benefits of utilizing the Project Email activity center.

*Note: For customers with EDMS integration, this session will include an overview of the EDMS specific functions in Project Files.*

#### **NPC 111: File Sharing using Info Exchange – up to 90 minutes**

*Prerequisites: NPC 100: Basics of Newforma Project Center*

In this training users will learn how to give Project Team members access to the Info Exchange website and understand Permissions. Participants will also learn how to use the Info Exchange activity center to send, receive and track file transfers. Participants will learn how to set up and manage Shared Folders. Also, participants will learn how to access the Info Exchange website when out of the office, find project information, and view and mark up PDF files in the Web Viewer.

- Participants will learn how to grant Project Team members access to the Info Exchange website
- Participants will learn about Permissions.
- Participants will learn how to send and receive basic file transfers.
- Participants will learn how to use the Info Exchange activity center to track all transfers.
- Participants will learn how to send a quick transfer, request files, and send personal transfers from Outlook.
- Participants will learn how to set up and manage Shared Folders.
- Participants will learn how to use the Info Exchange website to access project information when out of the office and get an introduction to using the Web Viewer.

#### Training to Review the Basics with Existing Users

#### **NPC 102: Review the Basics of Project Center – up to 90 minutes**

The purpose of this session is to review some of the most important basic information for Newforma Project Center, make sure people are utilizing the tools, learn some new advanced tips, and have a general question and answer session.

- Adding My Projects
- Navigate My Project Files.
- Search project information.
- View and Mark-up.
- Filing and managing project email.
- Manage the Project Team
- Send File transfers using Info Exchange

### Training for Upgrading Customers

*The New User courses are prerequisites.*

#### **NPC 104: What's New and Improved Eleventh Edition - up to 60 minutes**

In this session, users will understand what new features are included in Newforma Project Center Eleventh Edition, through 11.9.2.

- Get an overview of the enhancements for Action Items and Shared Folders
- Learn about the new and improved interface
- Get to know the new emailing filing options
- Learn about the new Administration options for licensing

### Training for All Users

*The New User courses are prerequisites.*

#### **NPC 201: Advanced Project Center – up to 90 minutes**

This training will build on the users' knowledge from the 100 series courses. Users will learn advanced functionality of the Project Team such as creating and managing groups. They will also learn additional methods of file sharing including Shared Folders and Document Sets. Users will also learn the benefit of using Action Items to manage project tasks.

- Review how to add external contacts and themselves to the Project Team and how to grant access to the Info Exchange website.
- Create and manage Info Exchange Shared Folders.
- Create and manage Documents Sets.
- Share a Document Set with external users
- Access Document Sets through Info Exchange.
- Create and manage Action Items.
- Send and manage Personal Transfers
- Use the Personal Transfer link to receive Personal Transfers

#### **NPC 202: Viewer, Markup, Project Images and Compare - up to 90 minutes**

In this training, users will learn how the Newforma® Viewer enables you to quickly markup and annotate any CAD, PDF or image. You will also learn how to use the Project Images activity center to view all photos and videos saved within your project. Finally, you will learn how to use the Compare feature to visually compare two files and compare contents of folders.

- Use the markup tool with the different options to annotate a drawing.
- Create a PDF to send to external team members via email or Info Exchange.
- Save the Markup session for other internal users to review and comment.
- View and markup files in the Info Exchange viewer.
- Use the Compare feature to find changes that have been made between successive versions of drawings, project folders and files, document sets, or transmittals.
- Use the Project Images activity center.

#### **NPC 203: Action Items, Meeting Minutes, and Project Timeline - up to 90 minutes**

In this training, users will learn how to create and manage Action Items for each project. Users will learn how the Newforma® Meeting Minutes activity center synchronizes with Microsoft Office Outlook and links meetings with related action items, supporting documents and more. In addition, the training includes an overview of the Newforma® Project Timeline activity center where users can view events based on a defined time frame.

- Create and manage Action Items in Newforma Project Center client and on the Info Exchange website.
- Create and manage project meetings, agenda, meeting minutes, and related items.
- Participants will learn how Meeting Minutes and Timeline interact with Outlook.
- Participants will learn how to view Meeting Minutes and the Project Timeline on the Info Exchange website.

#### **NPC 204: Transmittals, Record Copies, and Keywords - up to 90 minutes**

In this training, users will learn how to use the Transmittal activity center to track and manage incoming and outgoing transmittals; how to track and manage record copies in the Record Copies activity center; and how to track and manage keywords in the Keywords activity center.

- Log incoming and outgoing transmittals.

- View and print transmittal forms.
- View and manage Record Copies.
- Create, apply and manage Keywords.

### **NPC 205: Document Control- up to 90 minutes**

In this training, users will learn how to create, manage and distribute record documents and document packages using the Document Control activity center.

- Create and manager Record Documents.
- Create and manage document packages.
- Issue Record Documents and document packages.
- Add and manage revisions of Record Documents.
- Generate the Document Register Report.
- Learn how Record Documents are seen on Info Exchange.
- Overview how Record Documents work with the Newforma Plans app.

### **NPC 210: Document Sets and Document Control – 90 minutes**

In this training, participants will learn about the advantages of Document Sets and when to use them as an alternative means of file sharing and distribution. Also participants will learn about Document Control. This activity center allows you to standardize the revision management of record documents issued for review, permitting and construction. The issued record documents can also be accessed through the Newforma Plans App.

- Participants will learn how to create and manage Document Sets.
- Participants will learn when to use Document Sets over Shared Folders, and other use cases.
- Participants will learn how to create and issue Record Documents.
- Participants will learn how to revise Record Documents.
- Participants will learn how to create and issue Record Document Packages.
- Participants will learn how to use the Document Register Report.
- Participants will learn how Record Documents are seen on Info Exchange.
- Participants will understand how Record Documents work with the Newforma Plans app.

## **Training for Electronic Document Management Systems Users**

*The New User courses are prerequisites.*

### **NPC 206: NPC and EDMS User Training- up to 60 minutes**

In this training, users will learn how to search, view and manage files stored in an EDMS system through Newforma Project Center.

- Interact with documents stored in the EDMS system through Project Files.
- Use the EDMS functionality for document management through Project Files.
- Send files from the EDMS system through Info Exchange.
- Search and view files from the EDMS system from Project Center.
- Relate files stored in the EDMS system to other Newforma Project Center items.

## **Training for Project Close Out**

*The New Use courses are prerequisites.*

### **NPC 207: Project Publisher – up to 60 minutes**

In this training, users will learn how to create a close-out or hand-off package including transmittals and closing files.

- Use the Project Publisher to create a close-out package that is indexed with included transmittals and files from the initiating and closing actions.
- Configure the Project Publisher with the types of items, files and transmittals that are included in the package.
- Use different templates to publish the results.
- Distribute the package as needed.

## **Training for Mobile Field Users**

*The New User courses are prerequisites.*

### Mobile 101: Using Newforma Mobile Apps– up to 90 minutes

In this training, users will learn how to use Newforma apps to manage project email as well as how to capture and manage action items, punch list items and field notes from the mobile apps.

- Use the Project Teams app to view contact information for the project team.
- Use the Project Email App to view, search, sort, forward and reply to project email.
- Capture field notes, punch list items and action items with the Capture App.
- Manage field notes, punch list items and action items with the Tasks App.
- Use the Plans mobile app to view PDF plans and specs, annotate plans, locate field notes, punch list and action items.

### Mobile 201: Document Control and the Plans Mobile App - up to 90 minutes

In this training, users will learn how to manage revisions and issuance of record documents using Document Control. You will also learn how to use the Plans App when in the field to access record documents.

- Discuss the different needs of Internal and External users using the Plans App.
- Create and issue Record Documents.
- Add new revisions of Record Documents.
- Use the Plans mobile app to view PDF plans and specs, annotate plans, locate Field Notes, Punch List and Action Items.

### Mobile 202: Field Notes, Site Visits and Daily Reports – up to 90 minutes

In this training, users will learn how to create and capture Field Notes and then create Daily Reports and Site Visits from within Newforma Project Center.

- Capture Field Notes with the mobile app and manage through the activity center.
- Pull Field Notes into the Daily Reports and Site Visits and add other observations.
- Finalize the Daily Report and Site Visit Report.
- Manage a series of Site Visits and create the next site visit in the series.
- View Field Daily Reports and Site Visits from the Info Exchange website, and learn how to add, modify, finalize, and send Site Visit and Daily Reports from the project website.

### Mobile 203: Punch List and Spatial Index- up to 90 minutes

In this training, users will learn how to create and manage spaces through the Spatial Index and how to create and manage Punch List items through the Punch List activity center and Punch list apps.

- Create and manage spaces and elements in Newforma.
- Create and manage Punch List elements and descriptions in the Punch List activity center.
- Use the Capture and Tasks apps to create and manage Punch List Items.
- Edit and manage punch list items in the Punch List activity center.

### Mobile 204: Info Exchange for the External User – up to 60 minutes

In this training, users will learn how to interact as an external user with the Info exchange website. Students will learn how to send and receive files, RFIs and Submittals, manage action items and how to use the site to track information. Users will also learn how to use the PDF mark up tools.

- Receive files from the notification email and the Info Exchange website.
- Send files, RFIs and Submittals through the Info Exchange website.
- Create and manage project items on the Info Exchange website.
- View and mark up PDF files on the Info Exchange website.

## Training for Newforma Contract Management

*A Contract Management workflow consultation will be done prior to any Newforma Contract Management (NCM) training. This workflow analysis will help to determine the correct modules to train. The New User courses are prerequisites.*

### NCM 100: Contract Management Workflow Consultation - up to 90 minutes

In this meeting, specific workflow needs will be discussed so that the training can be customized to include the correct modules. Current workflow and configuration options for the NCM activities will also be addressed.

- Review current workflow of NCM related activities.
- Overview the available NCM activities and how they relate.
- Discuss Newforma workflow options.

- Discuss configuration options for NCM activities.

### **NCM 101: Submittal and RFI Workflow - up to 90 minutes**

In this training, users will learn the basic workflow of the Newforma Contract Management activity centers and how the items relate. Also, users will learn the specific workflow of Submittals and RFIs and how they can relate to other Newforma project items.

- Log/create and track electronic and physical RFIs and Submittals.
- Forward electronic and physical Submittals to reviewers.
- Stamp and respond to Submittals using the mark up and stamp tool.
- Close item and respond appropriately.
- Export RFI and Submittal logs.
- Learn how both internal and external team members can submit and receive RFIs and Submittals via Info Exchange.

### **NCM 102: RFI, Addenda and Sketch Workflow - up to 90 minutes**

In this training, users will learn the basic workflow of RFI, Addenda and Sketches including how the items relate.

- Log and track electronic and physical RFIs.
- Create and manage Addenda.
- Log and relate Sketches.
- Learn how to relate and track items together.

### **NCM 201: Supplemental Instructions, Construction Change Directives, Proposal Requests and/or Bulletins - up to 90 minutes**

In this training, users will learn the basics of the workflow and relationship of Construction Change Directives, Proposal Requests, Supplemental Instruction or Bulletins.

- Create, log and manage Bulletins or ASI/CCD/PR.
- Manage and link contracts to the items.
- Relate to other Contract Management items.
- Access reports and logs from the respective activity centers and on the Info Exchange website.

### **NCM 202: Contracts, Change Order Proposals, and Change Orders- up to 90 minutes**

In this training, users will learn the basics of the workflow and relationship of Contracts, Change Order Proposals and Change Orders.

- Create and manage and relate Items to Contracts.
- Create and manage Change Order Proposals.
- Create and manage Change Orders.
- Relate to other Newforma items.
- Run reports of all the activity centers.

### **NCM 203: Contract Management for the Internal Reviewer – up to 90 minutes**

In this training, Newforma Project Center users internal to your organization will learn how to respond to Newforma Contract Management items that have been sent to them for review.

- Log a reviewer response to a NCM item through the activity center.
- Stamp Submittals using the mark up and stamp tool and log reviewer response.
- Log a reviewer response from an email.
- Respond to Contract Management items on Info Exchange.

### **NCM 204: Contract Management for the External Reviewer – up to 60 minutes**

In this training, those reviewing items that are external to your organization will learn how to respond to Contract Management items that have been sent to them for review.

- Respond to Contract Management items on Info Exchange.
- Markup, stamp and respond to Submittals using the mark up and stamp tool on Info Exchange.
- Track status of items and review details from the Contract Management logs.
- Export logs from Info Exchange

### **NCM 205: Commitments: Contracts, Cost Codes, Potential Change Orders and Change Orders – up to 90 minutes**

In this training, users will overview the workflow involved with commitment management between the General Contractor and Sub-Contractors and then learn how to set up Cost Codes and create Contracts.

- Create and import Cost Codes.
- Create Contracts and track workflow of approvals and signatures.
- Relate other Newforma items to Contracts.
- Create Potential Change Orders from other Newforma items (like drawing or RFI).
- Set up a pricing grid in association with Potential Change Order (PCO).
- Send, track, and expedite pricing requests from subcontractors.
- Use the PCO Scoreboard for monitoring real-time status.
- Use the Info Exchange website interface for subcontractors to submit pricing proposal.
- Create change orders by bundling up approved PCO line items.

## Training for Building Information Management

*The New User courses are prerequisites.*

### NBIM 101: Project Information Link Training- up to 90 minutes

*Project Information Link, Models and Elements, and Spatial Index*

In this training, users will learn how the Newforma® Project Information Link connects with Autodesk® Revit® to synchronize project information created and maintained in Newforma® Project Center with building information model data created in Revit.

- Register a building model in Newforma.
- Publish PDF files from Revit sheets.
- Synchronize and publish Revit sheets with Newforma Record Documents.
- Synchronize Newforma Spatial Index with Revit Rooms.
- Synchronize Building Elements from Revit to Newforma.
- Create Action Items and Markups from Revit.

### NBIM 201: Newforma Model Viewer Admin Training – up to 90 minutes

In this training, users will learn how to set up the Newforma® Model Viewer and how to configure Revit to export the model to the Model Viewer.

- Configure the Newforma project to best work with the Model Viewer
- Learn the needed prerequisites for getting users started in the Model Viewer
  - Newforma ID, Info Exchange Settings, Project Team Settings
  - Software download and installed
- Model Viewer project setup
- Model Viewer custom settings
- Publish the Revit model
- Create Styles and Style Sets
- Search and assign styles to elements
- Create Master Presets for viewing
- Create and link views back to Newforma

### NBIM 202: Newforma Model Viewer User Training - up to 90 minutes

*Newforma Model Viewer Admin Training is a prerequisite to User Training.*

In this training, users will learn how to use the Newforma Model Viewer and how to link views to Newforma Project Center items.

- Get started using the Newforma Model Viewer
- Launch projects within the Newforma Model Viewer
- Create custom Style Sets and Master Presets
- Learn to use Sectioning, Measurements, and First Person tools
- Link NPC items to the model views
- Use the Model Viewer and the Model Views activity center from Info Exchange

## Training for Administrators

*The New User courses are prerequisites.*

**Note:** Any of these trainings will be presented from your environment - we will be using Newforma Project Center on one of your workstations where the user is signed in as a Global Administrator.

### Admin 101: Newforma Project Center Administration – up to 90 minutes

*This training is designed for both Global and Project Administrators who are using either Cloud Services and/or Info Exchange for sharing files and other project information. If only Project Administration is needed, refer to Admin 102.*

In this training, the Newforma Project Center Global Administrators will learn the basics on how to manage your Newforma servers, create projects, and apply global and project level settings.

- Review managing servers
- Review managing system Companies & Contacts
- Review managing internal user Licensing
- Review managing system Keyword lists
- Review managing external user Security settings
- Review creating projects and project templates
- Edit project settings

### Admin 102: Newforma Project Center Project Administration – up to 90 minutes

*This training session is designed specifically for Project Administrators and Project Creators who are using either Cloud Services and/or Info Exchange for sharing files and other project information. The topics in this session are also covered in Admin 101. If Global Administration is needed as well, refer to Admin 101.*

In this training, Project Administrators will learn how to create and manage Newforma projects.

- Create new projects and apply project templates.
- Create and manage project templates.
- Edit project settings.
- Manage Info Exchange settings for the project.

### Admin 103: Newforma Project Center Contact Directory – up to 60 minutes

*This training session is designed specifically for Content Administrators based on their administrative privileges. Most of the topics in this session are covered in Admin 101.*

In this training, the Newforma Project Center Content Administrator will learn how to create and manage Newforma Contacts, Companies, Keyword lists and form letters.

- Create and manage Newforma Contacts.
- Create and manage Contact Companies.
- Create and apply form letters.
- Create and edit global Newforma Keyword lists.

### Admin 111: Newforma Project Center Administration (with Info Exchange) – 60 to 90 minutes

*Prerequisite: Admin 110: Newforma Project Center Administration (with Cloud Services). This session is intended for Newforma Project Center Global and Project Administrators who have already implemented a Project Center Server, and are subsequently implementing an Info Exchange server for sharing files and other project information.*

Participants will learn how to manage their Info Exchange server along with global and project settings used across all of their projects.

- Participants will learn about settings related to their Newforma Info Exchange server.
- Participants will learn how to allow and manage Personal Transfers.
- Participants will learn how to add and edit Permission Sets for Info Exchange.
- Participants will learn how to limit file size sent by email and offer the user the ability to send files via Info Exchange instead.
- Participants will learn how to make a project available on the Info Exchange website and understand Info Exchange settings.
- Participants will learn which project settings information can be seen on the Info Exchange website.
- Participants will learn how to edit their project creation templates to include Info Exchange settings.

## Advanced Administrator Training

These four courses are intended for Newforma Project Center Global Administrators who want to learn more in-depth administration information and troubleshooting. The focus of these sessions is to troubleshoot common issues that occur. They do not cover setup or configuration of features. The course's intended audience is Newforma Project Center Global Administrators,



Newforma Champions who have access to the Newforma Project Center server as the Newforma admin account, and IT staff responsible for troubleshooting/supporting a company's Newforma environment. The IT staff could be internal or 3rd party IT.

*Prerequisites: NPC 100: Basics of Newforma Project Center, NPC 100: Basics of Newforma Project Center, NPC 110: Basic Project Team and File Sharing with Cloud Services, NPC 111: File Sharing Using Info Exchange, and Admin 101: Newforma Project Center Administration. Participants will need to have Global Administrator permissions in Newforma and have access to the Project Center server and Info Exchange server.*

### Admin 301: Advanced Project Center Administration

This session is intended to build upon the Admin 101 training and go into more depth around managing project data, best practices for project and user management, and common issues that may arise with each. A portion of this class also focuses on leveraging the Servers tab in Project Center Administration to view and troubleshoot errors.

- Participants will learn how to effectively manage Newforma project scopes. This will focus on the common functions of repathing, repining, and moving projects.
- Participants will learn best practices on managing contacts and companies in Newforma Project Center.
- Review what causes Max Path violations and the options for resolving them.
- Participants will learn how to troubleshoot and resolve some of the most common errors seen under the Servers tab.

### Admin 302: Outlook Add-In & Auto-file

This session is intended to cover troubleshooting common causes of end-user Outlook add-in issues, review the how the autofile process works, including key elements of making sure this process runs smoothly, and troubleshooting common errors/issues that users may experience with managing emails through both the Outlook add-in and the autofile process.

**\*\*** This course content is based on an Outlook/Exchange environment (in-house, hosted, or Office365). Large portions of this content are not applicable if customer is running a different mail environment, such as Gmail or Lotus Notes. **\*\***

- Participants will learn how to troubleshoot issues with Outlook add-in not loading and common errors that can occur during use.
- Participants will learn best practices for managing end user's My Projects list and Items to File Folders as well as how to troubleshoot issues that can occur when trying to add project/folders to Items to File folders.
- Participants will understand the autofile process and learn to troubleshoot autofile issues on both end-user client side and server side.
- Review considerations and best practices for managing Project Email.

### Admin 304: Indexing & Work Service

This session focuses on the Indexing and Work services, which are the core pieces that enable the Search functionality. Will review the functions and roles of each service and cover how to use Search Queries in Newforma to identify indexing issues. Discuss common issues that can impact the indexing of project data as well as how to leverage log files to troubleshoot these issues.

- Participants will learn the roles that the Indexing and Work services play in creating searchable project data.
- Review common environmental issues that impact both the Index and Work services.
- Participants will learn how to leverage Search Queries to determine a files indexing and filtering status
- Participants will learn how to use MySQL error logs and various Project Center Server log files to troubleshoot common indexing and work service issues.

## Training for Forms Customizations

*These sessions are designed for Newforma Administrators.*

### Forms 101: Project Center Basic Form Customization – up to 90 minutes

*Prerequisites: The New User courses, and training in any activity center associated with the needed report customizations.*

This session is designed for users who want to learn to customize basic Newforma Project Center (NPC) transmittal forms for their internal organization. Information on customizing Standard and Contract Management transmittals will be covered. The goals of the training include:

- Learn base knowledge of Forms Customization
- Learn best practices on customizing transmittal forms
- Learn how to setup and apply Custom Form Template Styles
- Create an internal support team to assist users in company specific workflows to identify which forms need customization
- Provide realistic examples to test the custom forms

- Maximize return on investment by having in-house resources fully informed on the customization techniques and best practices

### Forms 102: Project Center Advanced Form Customization – up to 90 minutes

*Prerequisites: The New User courses, training in any activity center associated with the needed report customizations, and Forms 101.*

This session is designed for users who want to learn advanced customization of Newforma Project Center (NPC) forms for their internal organization. Information on customizing the following templates will be covered: Meeting Minutes, Site Visits, Daily Reports, Contracts, and Change Orders. The goals of the training include:

- Learn advanced knowledge of forms customization
- Learn best practices on customizing forms
- Learn how to setup and apply Custom Form Template Styles
- Create an internal support team to assist users in company specific workflows to identify which forms need customization
- Provide realistic examples to test the custom forms
- Maximize return on investment by having in-house resources fully informed on the customization techniques and best practices

### Forms 103: Project Center Specialized Reports Customization – up to 90 minutes

*Prerequisites: The New User courses, training in any activity center associated with the needed report customizations, Forms 101, and Forms 102.*

This session is designed for users who want to learn how to customize Newforma Project Center (NPC) Specialized Reports for their internal organization. Information on Excel-based and Word-based Specialized Reports will be included. The goals of the training include:

- Learn base knowledge of Specialized Reports Customization
- Learn best practices on customizing Specialized Reports
- Learn how to setup and apply Custom Form Template Styles
- Create an internal support team to assist users in company specific workflows to identify which Specialized Reports need customization
- Provide realistic examples to test the custom Specialized Reports
- Maximize return on investment by having in-house resources fully informed on the customization techniques and best practices

## Newforma Champion Certification

*This is a formal program for users to become Certified Newforma Champions. The agenda for this course will be based on a customized plan to best fit the needs of your organization. Please discuss with your Newforma Training Consultant if you are interested.*

Newforma champion certification is designed for Newforma customers who desire to be the lead for the implementation of Newforma Project Center implementation at their firm. This certification is focused on discussion and planning for implementation, roll out and increasing user adoption. The goals of the program include:

- Discuss how Newforma Project Center will improve how you work on your projects.
- Review the key features and benefits of Newforma Project Center.
- Learn through doing with hands-on activities throughout the training.
- Discuss how the features of Newforma Project Center can be applied in your workflow.
- Certification levels:
  - Core Essentials – 2-day workshop
  - Contract Management – 1-day workshop

## Train the Trainer Certification

*This is a formal program for users to become Certified Newforma Trainers within your organization. Please discuss with your Newforma Training Consultant if you are interested.*

Newforma training certification is designed for Newforma customers who want certified internal resources to support and train Newforma Project Center (NPC) in their organization. The goals of the program include:

- Certify base knowledge of Newforma Project Center modules.
- Recognize in house training staff for their knowledge and accomplishment with Newforma Project Center.
- Create internal support team to assist users in company specific workflows.
- Maximize return on investment by having in-house resources fully informed on the functionality of Newforma Project Center so they can best implement the solution in their organization.
- Certification levels:
  - Core Essentials – 2 1/2-day workshop

- Contract Management – 2-day workshop

### Third Party IT Certification

*This is a formal program for IT Professionals who wish to gain knowledge to support Newforma customers throughout the Deployment, Configuration and Maintenance of Newforma Project Center. Please discuss with a Newforma Training Consultant if you are interested.*

The Project Center Solution Overview for IT Professionals walks the IT professional through the solution from a use case and infrastructure perspective, giving IT professionals overview of the breadth of functionality delivered by the product and all relevant client, server and infrastructure building blocks. The goals of the program include:

- Learn how Newforma client functionality works
- Learn about the backend components of Newforma Project Center
- Understand the process of a Newforma Project Center Upgrade
- Learn how to scale Newforma Project Center
- Learn about maintaining Newforma Project Center
- Certification level:
  - IT Foundation – 3-hour workshop

*Participants may qualify for AIA learning units with the completion of courses of 60 minutes or more.*