

## Greetings Project Team –

Shive-Hattery has integrated a project information application called Newforma Project Center™, and your project will be managed with this software. One of its components is Newforma Info Exchange™, a server application that facilitates sending and sharing transmittals, and file sharing.

As an external team member, you will be directed to the Shive-Hattery/Newforma Info Exchange server for all of your project transmittals and the associated files, and you will have access to this server to download files via any Internet-capable computer running Internet Explorer. Depending on your access rights, you may also choose to create your own transmittals and upload your files to the project team through this application, as well. A benefit of this application is that it allows the project team to bypass the file size limits of email systems when transferring files. In addition, all data uploaded or downloaded through the Shive-Hattery/Newforma Info Exchange server is encrypted and logged; notifications and reminders can be optionally scheduled; and expiration dates for documents can be automatically set.

### IMPORTANT

An important part of this new system is what is known as **Notification Emails:**

- An **Account Notification** email is sent when a project member from your company is added to our system in advance of upcoming document availability, and it contains username and password login information.
- A **Transmittal Notification** email is sent to notify the project member when project documents become available.

**Please note** that some anti-spam systems may flag the account notification email as junk mail; please ask your IT administrator to **add Shive-Hattery.com and Shive-Hattery.net to your company's anti-spam whitelist.**

The steps required for team members to use this transmittal and file sharing solution are quite simple; the following is a summary of what to expect and what steps to take upon receipt of both an Account Notification email and a Transmittal Notification email.

#### **Account Notification**

The first communication you receive after this will be an Account Notification email that contains your username and password information. *(If you delete or lose your Account Notification email, ask the Project Manager at Shive-Hattery to resend it.)*

A username and password is not necessarily required for document downloads, but, if you choose and have access rights to use this application to *upload* files, a username/password is needed. The Account Notification email Sender will be "Newforma@Shive-hattery.com," and the email will look similar to this image:

**A Helpful Hint!** When you receive an Account Notification email, take a moment to click on [Click here to login](#) and login using the temporary password supplied to you in the Account Notification email. (You will be prompted to change your password to one of your own choosing at that time). If you then **bookmark** or add the Shive-Hattery/Newforma

Info Exchange web server URL to your browser Favorites, you will be all set to upload or download files as needed; simply click on this Favorite in your browser to login.

### **Transmittal Notification – Transferring Files**

When transmittals are created for your project and you are a recipient, you will receive Transmittal Notification emails. These are messages telling you that a Transmittal has been created, and they contain links to the information published on our Shive-Hattery/Newforma Info Exchange server.

You may use **either of two quick steps** to retrieve these documents:

- 1) Open the email and click on [Click here to download](#). This link will automatically download the available documents (no username/password required), **OR**
- 2) Go to the site by clicking on your Shive-Hattery/Newforma Info Exchange bookmark in your browser, login, and then download the documents.

*If you have not previously logged in and bookmarked our site via the Account Notification Email, then you may go to <https://www.shive-hattery.net/userweb/Login/login.aspx?> to login. (Do not add "www" to this URL). However, you will still need the username and password that was sent to you in the earlier Account Notification email.*

A Transmittal Notification email will look similar to this image:

If you login to the site to transfer files, you will be directed to a list of one or many projects for which you have transmittal access. When you choose a project, you will see a list of all transmittals sent to you, or sent by you, for that project. When you choose a transmittal from the list, you will be able to read covering information about the transmittal and associated files, as well as any messages from the sender. The links for downloading the contents will appear in the left pane.

You may, depending on your project access, have the ability to create your own transmittals and upload your files to our server from this site. Further instructions for uploading files is available in [Help for Newforma Info Exchange](#) which can be accessed from all pages of the site by clicking on the "?" icon in the upper right corner. Additional help information is available at the bottom left corner of the Shive-Hattery/Newforma Info Exchange web page, labeled "Common Questions".

### **Important Notes Regarding Transmittals**

Please be aware that data sent via transmittals through Shive-Hattery/Newforma Info Exchange may have an **expiration date**. The main reason for this is to eliminate the possibility of old data being accidentally downloaded. In addition, some download links will be encrypted with automatic download actions. **You may receive a popup blocking automatic downloads**; most security settings will allow you to temporarily override them and you can immediately save the data to your local hard drive or server. The file you download will always be a single .ZIP compressed file, regardless of the number of project files being transferred within.

**Thank you** for your attention to this introductory email regarding how to use this new file sharing and transmittal facility. If you have further questions, please contact the Shive-Hattery Project Manager for assistance.

Shive-Hattery