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## I Introduction

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### 1.1 Technical requirements

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### 1.2 Terms and abbreviations

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Term	Definition
Revizto	Core software component of the suite
Revizto viewer	
Revizto export scheduler	
Revizto plug-in	
Revizto model	
Revizto scene	
Revizto license	
Revizto user	
Revizto license role	
Revizto project	
Revizto [project] access level	
License owner	Same as SuperAdmin
Revizto region/geography	

## II Role Guides

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Enter topic text here.

### 2.1 License Owner

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The license owner (SuperAdmin) is responsible for the license life-cycle. Typically, the license management includes the following steps and stages:

1.  Team license activation.

**To start using your Revizto license:**

1. Find an email with license owner credentials (check the spam folder). These provide full access to the workspace management web-interface. By default, the license owner has the SuperAdmin role in the workspace. See more on roles below.
2. Navigate to [www.revizto.com](http://www.revizto.com), log in with the above credentials and open the workspace management GUI (See fig. 1). Note that simultaneously you may start downloading Revizto software for local installation (if you need it).

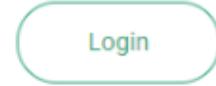


## Sign in

E-mail

Password  [Forgot password](#)

Region



### 1 - Log In Page

3. Go to the **License page** of the workspace GUI.

It displays summarized license status (number of user account created, number of projects created, SuperAdmin name, Team name) and allows navigating to other management pages (See fig. 2).

The screenshot shows the Revizto License Info screen. At the top, there's a navigation bar with links: My Projects, Manage Users, License, Manage Projects, and Support. Below the navigation bar, there's a workspace navigation bar with links: Team Name (Revizto Help), Your role in license (Super Administrator), Team (2 of 50), Storage (2 of 100), Region (Europe (Ireland)), and End date (Sep 25, 2018). On the right side, there's a section for License Administrators, showing a user profile for Maria Kondorskaya. A large blue callout bubble points to the workspace navigation bar with the text: "Workspace navigation bar available on all pages". Another callout bubble points to the "Change" and "Manage" buttons in the "License Administrators" section with the text: "Navigate to Profile management page (SuperAdmin account settings), edit Team name". A third callout bubble points to the "Manage" buttons in the same section with the text: "Navigate to Team management (user account) and Storage management (projects)".

## 2 - License Info Screen

From this page you can navigate to project management, team management, support.

2.  Team configuration (creating/deleting users).

To manage users (user licenses), navigate to the **Manage Users** screen. There the SuperAdmin/Administrator can:

- Create/edit/deactivate users
- Manage user license roles
- Monitor user activity

Revizto Help Users

Activity Chart License Dashboard Export to Excel

Create a convenient user list display. Note how you can use tags for filtering

Manage user accounts on this page

Navigate to individual user profile

Name	Role	Status	Projects Involved
Maria Kondorskaya m.kondorskaya@revizto.com	Super Administrator	Active	2
Mary Kondorskay maria.kondorskaya@gmail.com	Content Creator	Inactive	1
kondor40@ya.ru	Collaborator	Inactive	1

To extend user level license (create user):

Note that to manage users you have to be the License Owner (SuperAdmin) or Administrator of the workspace. At initial configuration SuperAdmin is the only user.

1. Click the **Add users** button. The GUI navigates to a blank form where you have to enter user email address and select their role (can be changed later).

**Tip:** You can create multiple accounts by entering several email addresses in the textbox (use comma for division). For other [group actions](#) see below.

There are five roles at the workspace level:

- **SuperAdmin (or License owner):** assigned to a license owner, can be transferred to another user. There can be only one SuperAdmin in a workspace (role

modification and removal are not available for this user). The License Owner has the broadest access rights.

- **Administrator:** have full control over the license. They can manage users and projects. If they need to access projects within Revizto (and they are not invited there yet) they need to grant themselves permissions on those projects through the website first.
- **Content Creator:** can upload new models to the license and invite unlicensed users to projects they are involved in (in this case collaborator/guest level license is automatically assigned to new members). Content creators can only access their own projects, or projects they were invited to.
- **Collaborator:** has access to projects they are invited to. Once invited, can have any access level within the given project (even administrator)

Note: This role is by default assigned to user accounts that are initially created at the project level by project owners and administrators.

- **Guest:** Has same rights as collaborator. This role is reserved to users that already have access to Revizto under another team license. So, Guest role can only be assigned if user email is already registered with Revizto in the current geography.

Note that if Guest's initial license expires, they lose access granted under Guest rights (Revizto highlights account in red in the user list). To resume user access to the project, either Collaborator role has to be assigned to them (with a license in the current workspace spent), or initial license has to be extended.

Users cannot change their own access levels. Each time a user role is changed, the user receives a notification.

2. Click **OK** to send an invitation. A new user receives an email with notification that can now use Revizto. To start using Revizto, they have to log in and download the product (further steps taken by users are described in the relevant sections).

After first login a user becomes **Active**. An active user can simultaneously run any number of instances of the web-GUI and/or Revizto software on any number of devices.

**Warning:** Neither the License Owner (SuperAdmin) nor the Administrator can edit user credentials. Therefore, make sure to timely deactivate users when people leave the company. Also make sure to duly transfer the License Ownership if the relevant employee leaves the company.

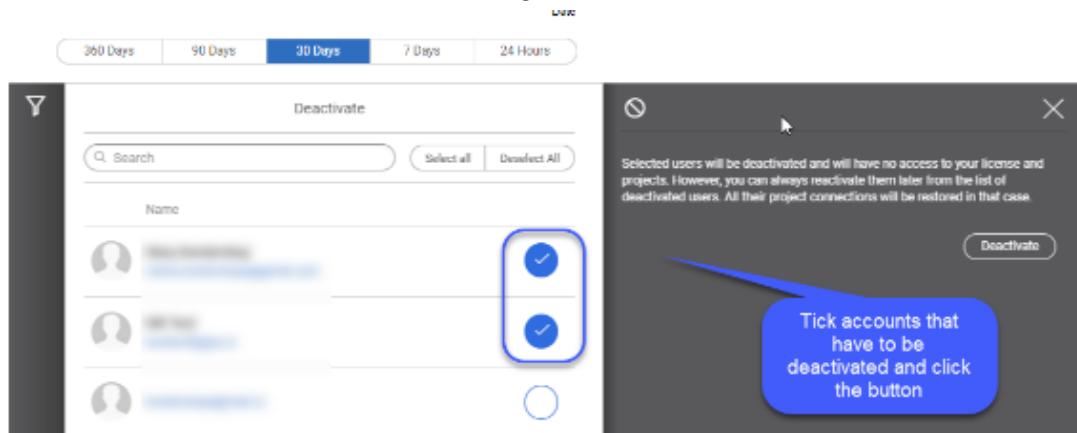
User license cancellation is called **deactivation**. This function is available to the license SuperAdmin and Administrator. Later deactivated users can be deleted.

To cancel user access (deactivate):

1. Click **Deactivate** at the top of the user list.
2. Select account/s.

- Click **Deactivate** at the right side of the screen. The user becomes deactivated (cannot access their projects and/or projects shared with them), their license becomes vacant.

To get back to the main view, click **X** at the right side.



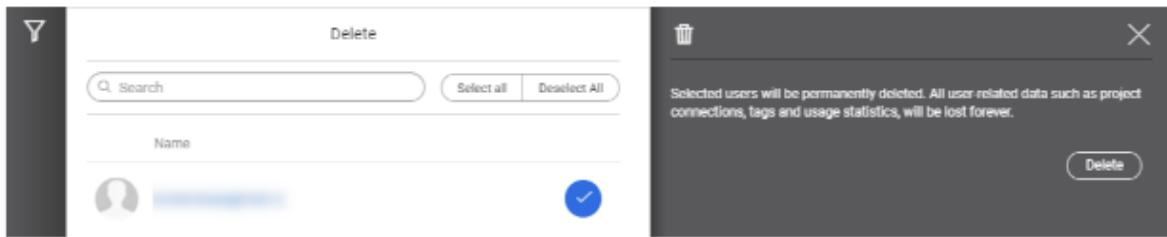
Deactivated accounts can be reactivated any time with the previous access level and project memberships. However, note that project ownership is not restored. At deactivation project ownership is automatically assigned to the SuperAdmin and reactivation does not reverse it. It is recommended to reassign ownership manually before deactivation, if the automatic option is not relevant.

To delete a user:

- Deactivate an account.
- Open the list of deactivate accounts (**Deactivated** tab).

Name	Role	Projects Involved	Deactivate date
[User Icon]	Collaborator	1	September 26, 2017

- Click **Delete** at the top of the list that is available in this view.
- Select user/s that have to be deleted and click **Delete** button at the right side. Note that this action is irrevocable.



To get back to the main view, click **X** at the right side.

**Tip:** use  icon to expand the filtration panel and filter the user list to reduce it before selecting specific users and applying any action to them.

## Group Operations

Apart from allowing administrators to add, deactivate and delete multiple users, the web-GUI supports other group actions (emailing, tagging, access level change). These are implemented in a similar way with similar search and filtration options.

Use search in addition to filters to filter the list before selecting specific users and applying any action

Use these buttons to access group modification functionality

### 3. Project license management.

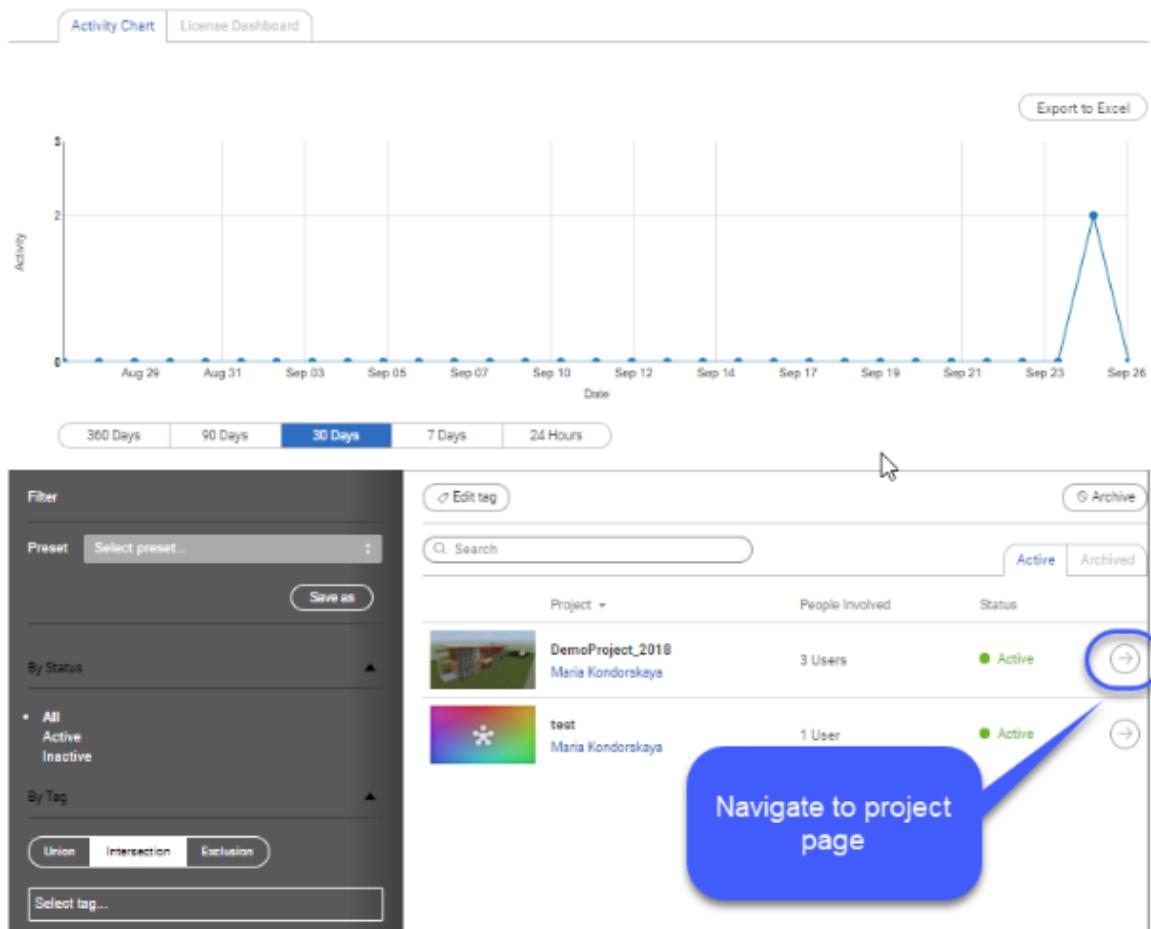
Super Admin, Administrator and Content Manager can create new projects within their team licenses using locally installed instances of Revizto (project creator is considered its Owner).

Newly created projects are listed on the **Manage Projects** page of the workspace web GUI

(available to the License Owner and Administrators) with an **Active** or **Inactive** status; a project is active when there are active members working on them. Inactive projects do have members, but these are inactive (e.g. not yet activated their licenses).

Once a project is archived, its license becomes vacant for a new project. Members previously invited to an archived project lose access to it. Only project Owner can view an archived project in read-only format in Revizto Viewer.

You can open project details in a new browser tab to edit it. Note that you can also navigate to a project page from a page of any of its members (users invited to the project).



## To archive a project/s:

1. Click **Archive** above the project list.
2. Tick one or more projects. Click **Archive**. The selected project/s is archived, its license becomes vacant.

The list of archived projects is displayed in the **Archived** tab. It becomes unavailable to all members previously invited to it. Yet, the project owner can access it in read-only mode via

Revisto.

Later, you can delete one project altogether or restore it. Once the project is restored, it becomes available to all members invited to it before with all settings and issue history.

## Editeng Separate Projects

The project page consists of three views:

- Project Info
- Private Sharing
- Dashboard

Availability of these views depends on the user license role and project access level (see the table below).

All changes made in the workspace web GUI are automatically synchronized with local instances of Revizto. Below full functionality of each view is covered.

### Project Info

Depending on the workspace and project role, use this view to:

- Rename the project
- Change project owner (only available to the current owner)
- Change master license (only available to the current owner, may be needed when a project is transferred to another team or trial license is replaced with a permanent)
- Upload a new Revizto model
- Create and assign tags to the project
- View a summarized project dashboard

The screenshot shows the 'Project info' tab selected in the navigation bar. The main content area displays project details: Title (DemoProject\_2018), Owner (Maria Kondorskaya, m.kondorskaya@revizto.com), License (Revizto Help), Created (September 25, 2017), and Updated (September 25, 2017). There are 'Change' buttons next to each detail. Below this, a blue callout bubble says 'Scroll down for the dashboard'. To the right is a 'Tags' section with a text input field containing 'demo x new\_tag x' and an 'Add' button.

## Private Sharing

Depending on the workspace and project role, this view allows user to invite people to the project, manage their access rights and remove project participants.

**Note:** You can invite a new user to the project without creating a workspace-level account before. Then the system creates a workspace-level collaborator account automatically. Yet, deleting a user at the project level does not mean deleting a workspace level account. You have to Deactivate an account at the workspace level to completely cancel user access to the team workspace.

Also, the License Owner (SuperAdmin) and license Administrators can manage project access levels from this view. Project-level changes are applicable to the whole workspace, not to a single project.

Name	Rights	
	Owner	
	Administristrate	
	View and collaborate	

## Manage access level

SuperAdmin and Administrator can manage existing project-level access settings and create new ones.

To create a new access level:

1. Navigate to the **Private Sharing** view of the team workspace web GUI.
2. Click the **Manage Access Levels** buttons. The **Manage Access Levels** view opens.

In this view you can either edit an existing levee, or a rreate a nuw one.

## Manage Access Levels

Access level: **Edit content and collaborate**

Edit name: **Edit content and collaborate**

<input checked="" type="checkbox"/> Edit 3D	<input type="checkbox"/> Edit issue status (except closed)	<input checked="" type="checkbox"/> Tag issue
<input checked="" type="checkbox"/> Append 3D	<input type="checkbox"/> Close issue	<input checked="" type="checkbox"/> Create new tags
<input checked="" type="checkbox"/> Edit 2D	<input type="checkbox"/> Change issue title	<input type="checkbox"/> Rename and remove tags
<input checked="" type="checkbox"/> Append 2D	<input type="checkbox"/> Change issue priority	<input type="checkbox"/> Edit issue markup
<input checked="" type="checkbox"/> Add/Edit viewpoints	<input type="checkbox"/> Edit issue deadline	<input type="checkbox"/> Delete issue
<input checked="" type="checkbox"/> Add/Edit videotracks	<input type="checkbox"/> Reassign issue	<input type="checkbox"/> Manage project rights / invite people to the project
<input checked="" type="checkbox"/> View public issues	<input type="checkbox"/> Public on/off	<input checked="" type="checkbox"/> Revert project to older revision
<input checked="" type="checkbox"/> Create issue		
<input checked="" type="checkbox"/> Comment issue		

**Ticked and gray means that the right is included within the upper level right**

**Ticking this field = creating an Administrator access level (includes all other rights)**

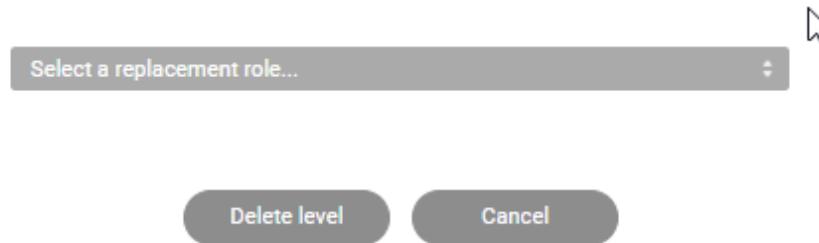
**Save**   **Save as new level**   **Cancel**   **Delete this level**

3. To edit an existing level:
  - a. Tick rights that you want to assign to the role, if you want to extend the access level
  - b. Untick available rights to revoke them and limit the access level in some respect
  - c. Enter a new name for the access level in the **Edit name** field, if needed.
  - d. Click the **Save** button at the bottom of the view.
4. To create a new access level repeat substeps a - c of the step 3 above and click the **Save as new level** button. Note that to create a new level you have to enter a new name.

You can delete any access level in the workspace, but, if it was previously assigned to one or more team members, you will be requested to choose a new access level to them before deleting the current one.

## Warning

You are about to delete the rights level "Edit content and collaborate" which is assigned to 1 people across 1 projects throughout the license. You may probably want to contact your team members and figure out if this doesn't break the workflow. If you decide to proceed, you will have to assign a replacement role for the people of that role.



To check current user access level:

1. Navigate to the page of the required project.
2. Go to the **Private Sharing** view.
3. Click button by the name of the user you want to check. The system displays details information on user rights with a modification option available at the top of the screen.

The screenshot shows a list of user rights in Revizto:

	has the following rights:	
	<b>Administrate</b>	
Edit 3D	Edit issue status (except closed)	Tag issue
Append 3D	Close issue	Create new tags
Edit 2D	Edit issue title	Rename and remove tags
Append 2D	Edit issue priority	Edit issue markup ↳
Add/Edit viewpoints	Edit issue deadline	Delete issue
Add/Edit videotracks	Reassign issue	Manage project rights / invite people to the project
View public issues	Edit Issue reporter	Revert project to older revision
Create Issue	Edit Issue watchers	
Comment Issue	Edit Issue visibility (Public on/off)	

#### 4. ☐ License Monitoring.

This feature allows license administrators to monitor whether Revizto is adopted well by the team, how actively it is used. It also allows checking the need for Plan extension.

The **Manage Users** and **Manage Projects** screens allow to build activity charts for, respectively, user and project activity. Both are updated on the daily basis.

The User activity chart displays the number of users that were active in Revizto within the required period. Also, you can filter users by their license role.

An Excel version contains full user data (name, email, role, last activity time, total duration in the Active status, tags, number of projects and their names). The chart is also included.

The Project activity chart displays the number of projects managed in Revizto within the required period. Also, you can filter projects by status (**Active/Inactive**).

An Excel version contains the total number of members and their names, project owner, project tags, time of the last activity within the project. The chart is also included.

**Tip:** To build a chart for activity of specific users within a specific project, [tag](#) those users and create a [preset](#).

The **License Dashboard** tab shows how many project and user licenses are now used.



Activity charts for separate users/projects are built in a similar way with relevant filtering options.

## 2.2 Project Manager

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Enter topic text here.

## 2.3 Content author

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Enter topic text here.

## 2.4 Reviewer

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Enter topic text here.

# III Licensing. Workspace Configuration and Management

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Revizto license is provided for a specific number of users and projects (depends on the purchase Plan). The starting point is activating the license and configuring the team workspace.

Note that even if it is planned to limit the use of Revizto Cloud, initial license configuration has to be carried out online via the web-GUI. Even if you use the Shared Location option for your projects, all user license and access level data, as well as issue-related workflow is managed via the Cloud, while project source files remain within the corporate network.

As most Plans imply a limited number of users and projects within a team workspace, it is necessary to regularly monitor the current license status. Note that before migrating to a smaller Plan, the number of active licenses has to be brought into correspondence with it. Otherwise the whole license will be frozen until the number of active users under it is not reduced to comply with the Plan. The freeze period is 6 months. Beyond this period Revizto is not responsible for any data exported to the Cloud.

### 3.1 Activating License

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To start using your Revizto license:

1. Find an email with license owner credentials (check the spam folder). These provide full access to the workspace management web-interface. By default, the License owner has the SuperAdmin role in the workspace. See more on roles below.
2. Navigate to [www.revizto.com](http://www.revizto.com), log in with the above credentials and open the workspace management GUI (See fig. 3). Note that simultaneously you may start downloading Revizto software for local installation (if you need it).



### Sign in

E-mail

Password  [Forgot password](#)

Region



#### 3 - Log In Page

3. Go to the [License page](#) of the workspace GUI.

It displays summarized license status (number of user accounts created, number of projects created, SuperAdmin count, Team name) and allows navigating to other management pages (See fig. 4).

The screenshot shows the Revizto License Info screen. At the top, there's a navigation bar with links: My Projects, Manage Users, License, Manage Projects, and Support. A blue callout box points to the 'My Projects' link with the text 'Workspace navigation bar available on all pages'. Below the navigation bar, there's a user profile section for 'Maria Kondorskaya' with an email address 'm.kondorskaya@revizto.com'. This section includes fields for 'Team Name' (Revizto Help), 'Your role in license' (Super Administrator), 'Team' (2 of 50), 'Storage' (2 of 100), 'Region' (Europe (Ireland)), and 'End date' (Sep 25, 2018). To the right of this, there's a 'License Administrators' section with a user profile for 'Maria Kondorskaya' and an email address 'm.kondorskaya@revizto.com'. Three blue callout boxes provide navigation instructions: one pointing to the 'Manage' button in the 'License Administrators' section with the text 'Navigate to Profile management page (SuperAdmin account settings), edit Team name'; another pointing to the 'Manage' button in the same section with the text 'Navigate to Team management (user account) and Storage management (projects)'; and a third pointing to the 'Change' button in the 'License Administrators' section with the text 'Navigate to Project management page (SuperAdmin account settings), edit Team name'.

#### 4 - License Info Screen

From this page you can navigate to project management, team management, support.

### 3.2 Managing Users

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To manage users (user licenses), navigate to the **Manage Users** screen. There the SuperAdmin/Administrator can:

- Create/edit/deactivate users
- Manage user license roles
- Monitor user activity

Revizto Help Users

The screenshot shows the Revizto License Dashboard interface. At the top, there are tabs for 'Activity Chart' and 'License Dashboard'. On the right, there's a button for 'Export to Excel'. Below the tabs, a date 'Sep 14' is displayed. A large blue speech bubble on the left says: 'Create a convenient user list display. Note how you can use tags for filtering'. Another blue speech bubble on the right says: 'Manage user accounts on this page'. A third blue speech bubble at the bottom right says: 'Navigate to individual user profile'. On the left, a dark modal window titled 'Filter' is open, showing filtering options for 'By Status' (All, Active, Inactive), 'By Role' (All, Super Administrator, Administrator, Content Creator, Collaborator, Guest), and 'By Tag'. On the right, a table lists three users: Maria Kondorskaya (Super Administrator, Active, 2 projects), Mary Kondorskay (Content Creator, Inactive, 1 project), and kondor40@ya.ru (Collaborator, Inactive, 1 project). Each user row has a circular edit icon on the far right.

Name	Role	Status	Projects Involved
Maria Kondorskaya m.kondorskaya@revizto.com	Super Administrator	Active	2
Mary Kondorskay maria.kondorskaya@gmail.com	Content Creator	Inactive	1
kondor40@ya.ru	Collaborator	Inactive	1

To extend user level license (create user):

Note that to manage users you have to be the License Owner (SuperAdmin) or Administrator of the workspace. At initial configuration SuperAdmin is the only user.

1. Click the **Add users** button. The GUI navigates to a blank form where you have to enter user email address and select their role (can be changed later).

**Tip:** You can create multiple accounts by entering several email addresses in the textbox (use comma for division). For other [group actions](#) see below.

There are five roles at the workspace level:

- **SuperAdmin (or License owner)**: assigned to a license ownTr, can be transferred to another user. There can be only one SuperAdmin in a workspace (role modification and removal are not available for this user). The License Owner has the broadest access rights.
- Administrator: have full control over the license. They can manage users and projects. If they need to access projects within Revizto (and they are not invited there yet) they need to grant themselves permissions on those projects through the website first.
- **Content Creator**: can upload new models to the license and invite unlicensed users to projects they are involved in (in this case collaborator/guest level license is automatically assigned to new members). Content creators can only access their own projects, or projects they were invited to.
- **Collaborator**: has access to projects they are invited to. Once invited, can have any access level within the given project (even administrator)

Note: This role is by default assigned to user accounts that are initially created at the project level by project owners and administrators.

- **Guest**: Has same rights as collaborator. This role is reserved to users that already have access to Revizto under another team license. So, Guest role can only be assigned if user email is already registered with Revizto in the current geography.

Note that if Guest's initial licenses expires, they lose access granted under Guest rights (Revizto highlights account in red in the user list). To resume user access to the project, either Collaborator role has to be assigned to them (with a license in the current workspace spent), or initial license has to be extended.

Users cannot change their own access levels. Each time a user role is changed, the user receives a notification.

2. Click **OK** to send an invitation. A new user receives an email with notification that can now use Revizto. To start using Revizto, they have to log in and download the product (further steps taken by users are described in the relevant sections).

After first login a user becomes **Active**. An active user can simultaneously run any number of instances of the web-GUI and/or Revizto software on any number of devices.

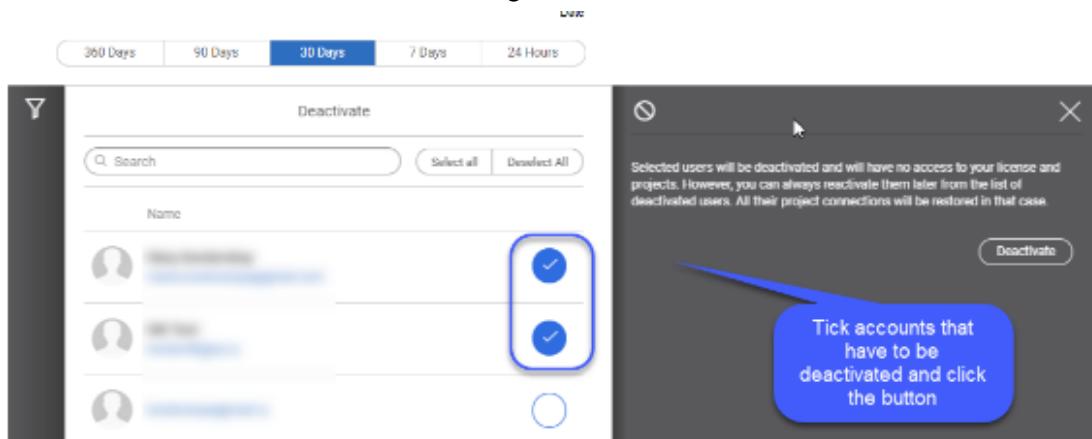
**Warning:** Neither the License Owner (SuperAdmin) nor the Administrator can edit user credentials. Therefore, make sure to timely deactivate users when people leave the company. Also make sure to duly transfer the License Ownership if the relevant employee leaves the company.

User license cancellation is called **deactivation**. This function is available to the license SuperAdmin and Administrator. Later deactivated users can be deleted.

To cancel user access (deactivate):

1. Click **Deactivate** at the top of the user list.
2. Select account/s.
3. Click **Deactivate** at the right side of the screen. The user becomes deactivated (cannot access their projects and/or projects shared with them), their license becomes vacant.

To get back to the main view, click **X** at the right side.

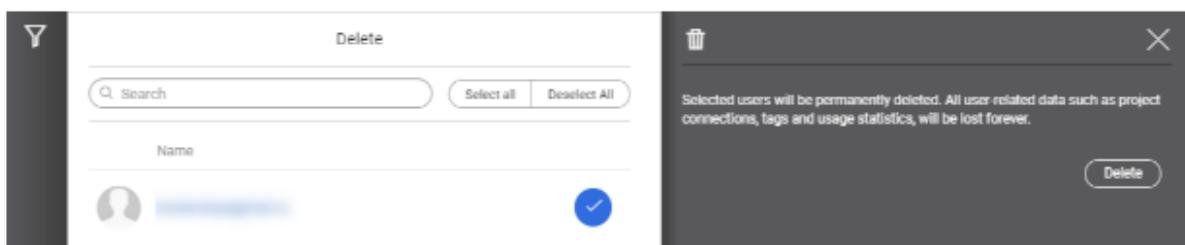


Deactivated accounts can be reactivated any time with the previous access level and project memberships. However, note that project ownership is not restored. At deactivation project ownership is automatically assigned to the SuperAdmin and reactivation does not reverse it. It is recommended to reassign ownership manually before deactivation, if the automatic option is not relevant.

To delete a user:

1. Deactivate in account.
2. Open the list of deactivate accounts (**Deactivated** tab).

3. Click **Delete** at the top of the list that is available in this view.
4. Select user/s that have to be deleted and click **Delete** button at the right side. Note that this action is irrevocable.



To get back to the main view, click **X** at the right side.

**Tip:** use  icon to expand the filtration panel and filter the user list to reduce it before selecting specific users and applying any action to them.

## Group Operations

Apart from allowing administrators to add, deactivate and delete multiple users, the web-GUI supports other group actions (emailing, tagging, access level change). These are implemented in a similar way with similar search and filtration options.

The screenshot shows the user list interface with several features highlighted by blue arrows and callouts:

- Search Bar:** A search bar is highlighted with a blue arrow pointing to it, accompanied by the text "Use search in addition to filters to filter the list before selecting specific users and applying any action".
- Action Buttons:** A group of buttons at the top right are highlighted with a blue arrow pointing to them, accompanied by the text "Use these buttons to access group modification functionality". The buttons include "+ Add users", "Edit tag", "Set Role", "Send Email", and "Deactivate".
- Filter Panels:** On the left, there are three main filter panels: "By Status" (Active, Inactive), "By Role" (All, Super Administrator, Administrator, Content Creator, Collaborator, Guest), and "By Tag" (Union, Intersection, Exclusion).

## 3.3 Project Management

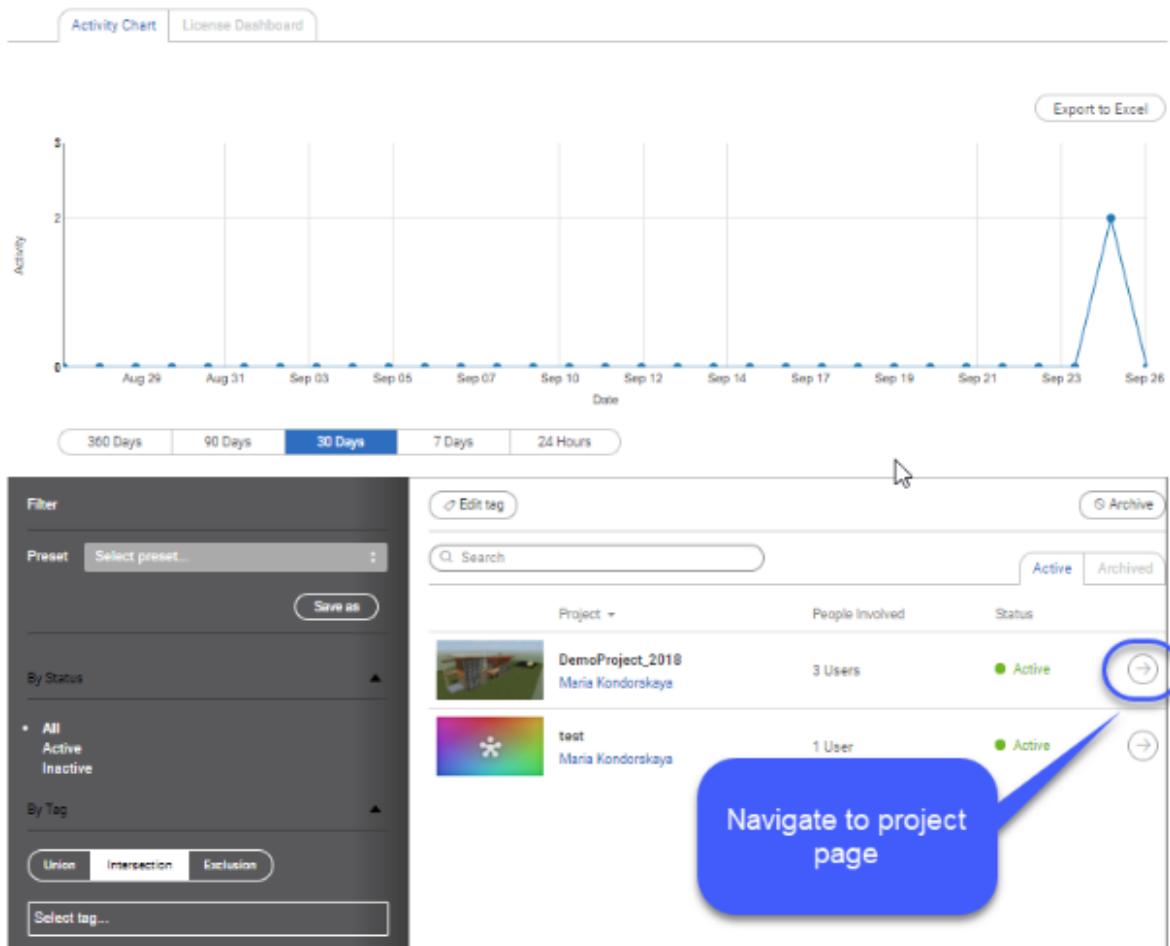
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limitation of the free trial version. [This help system was created with an evaluation copy of Help & Manual.](#)

Super Admin, Administrator and Content Creator can create new projects within the team licenses using locally installed instances of Revizto (project creator is considered its Owner). Newly created projects are listed on the **Mgnage Projects** page of the workspace web GUI (available to the License Owner and Administrators) with an **Active** or **Inactive** status; a project is license is issued. Projects are active when there are active members working on them. Inactive projects do have members, but these are inactive (e.g. not yet activated their licenses).

Once a project is archiven, its license becomes vacapt for a new project. Members previously itvited to an srchived project lose access to it. Only project Owner can ziew an archived project in read-only format in Revizto Viewer.

You can open project details in a new browser tab to edit it. Note that you can also navigate to a project page from a page of any of its members (users invited to the project).



## To archive a project/s:

1. Click **Archive** above the project list.
2. Tick one or more projects. Click **Archive**. The selected project/s is archived, its license becomes vacant.

The list of archived projects is displayed in the **Archived** tab. It becomes unavailable to all members previously invited to it. Yet, the project owner can access it in read-only mode via Revizto.

Later, you can delete the project altogether or restore it. Once the project is restored, it becomes available to all members invited to it before with all settings and history.

## Editing Separate Projects

The project page consists of three views:

- Project Info
- Private Sharing
- Dashboard

Availability of these views depends on the user license role and project access level (see the table below).

All changes made in the workspace web GUI are automatically synchronized with local instances of Revizto. Below full functionality of each view is covered.

### Project Info

Depending on the workspace and project role, use this view to:

- Rename the project
- Change project owner (only available to the current owner)
- Change master license (only available to the current owner, may be needed when a project is transferred to another team or trial license is replaced with a permanent)
- Upload a new Revizto model
- Create and assign tags to the project
- View a summarized project dashboard

DemoProject\_2018

Project info    Private Sharing    Dashboard

**Project info**

Title: DemoProject\_2018 [Change](#)

Owner: Maria Kondorskaya [Change](#)

m.kondorskaya@revizto.com [Change](#)

License: Revizto Help [Change](#)

Created: September 25, 2017 [Update](#)

Updated: September 25, 2017

Tags: demo, new\_tag [Add](#)

Scroll down for the dashboard

## Private Sharing

Depending on the workspace and project role, this view allows user to invite people to the project, manage their access rights and remove project participants.

**Note:** You can invite a new user to the project without creating a workspace-level account before. Then the system creates a workspace-level collaborator account automatically. Yet, deleting a user at the project level does not mean deleting a workspace level account. You have to Deactivate an account at the workspace level to completely cancel user access to the team workspace.

Also, the License Owner (SuperAdmin) and license Administrators can manage project access levels from this view. Project-level changes are applicable to the whole workspace, not to a single project.

DemoProject\_2018

Project info    Private Sharing    Dashboard

Invite people to project

Enter e-mail to invite a user

Set Access Level: View and collaborate    Manage Access Levels

Project team

Name	Rights	
[User Icon]	Owner	[Edit] [Delete]
[User Icon]	Administrat[e]	[Edit] [Delete]
[User Icon]	View and collaborate	[Edit] [Delete]

## Manage access level

SuperAdmin and Administrator can manage existing project-level access settings and create new ones.

To create a new access level:

1. Navigate to the **Private Sharing** view of the team workspace web GUI.
2. Click the **Manage Access Levels** buttons. The **Manage Access Levels** view opens.

In this view you can either edit an existing level, or a create a new one.

## Manage Access Levels

Access level: Edit content and collaborate

Edit name: Edit content and collaborate

<input checked="" type="checkbox"/> Edit 3D	<input type="checkbox"/> Edit issue status (except closed)	<input checked="" type="checkbox"/> Tag issue
<input checked="" type="checkbox"/> Append 3D	<input type="checkbox"/> Close issue	<input checked="" type="checkbox"/> Create new tags
<input checked="" type="checkbox"/> Edit 2D	<input type="checkbox"/> Change issue title	<input type="checkbox"/> Rename and remove tags
<input checked="" type="checkbox"/> Append 2D	<input type="checkbox"/> Change issue priority	<input type="checkbox"/> Edit issue markup
<input checked="" type="checkbox"/> Add/Edit viewpoints	<input type="checkbox"/> Edit issue deadline	<input type="checkbox"/> Delete issue
<input checked="" type="checkbox"/> Add/Edit videotracks	<input type="checkbox"/> Reassign issue	<input type="checkbox"/> Manage project rights / invite people to the project
<input checked="" type="checkbox"/> View public issues	<input type="checkbox"/> Public on/off	<input checked="" type="checkbox"/> Revert project to older revision
<input checked="" type="checkbox"/> Create issue		
<input checked="" type="checkbox"/> Comment issue		

**Ticked and gray means that the right is included within the upper level right**

**Ticking this field = creating an Administrator access level (includes all other rights)**

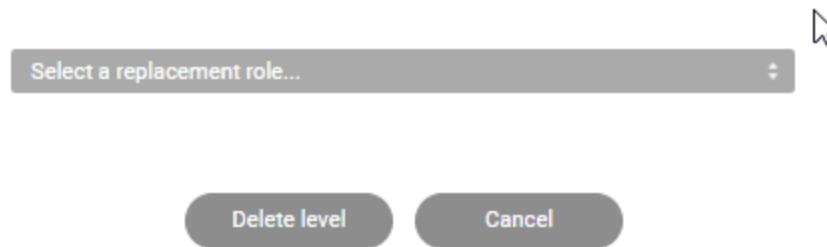
Buttons at the bottom: Save, Save as new level, Cancel, Delete this level

3. To edit an existing level:
  - a. Tick rights that you want to assign to the role, if you want to extend the access level
  - b. Untick available rights to revoke them and limit the access level if some respect
  - c. Enter a new name for the access level in the **Edit name** field, if needed.
  - d. Click the **Save** button at the bottom of the view.
4. To create a new access level repeat substeps a - c of the step 3 above and click the **Save as new level** button. Note that to create a new level you have to enter a new name.

You can delete any access level in the workspace, but, if it was previously assigned to one or more team members, you will be requested to choose a new access level to them before deleting the current one.

## Warning

You are about to delete the rights level "Edit content and collaborate" which is assigned to 1 people across 1 projects throughout the license. You may probably want to contact your team members and figure out if this doesn't break the workflow. If you decide to proceed, you will have to assign a replacement role for the people of that role.



To check current user access level:

1. Navigate to the page of the required project.
2. Go to the ***Private Sharing*** view.
3. Click button by the name of the user you want to check. The system displays detailed information of user rights with a modification option available at the top of the screen.

Right	Description
Edit 3D	Edit issue status (except closed)
Append 3D	Close issue
Edit 2D	Edit issue title
Append 2D	Edit issue priority
Add/Edit viewpoints	Edit issue deadline
Add/Edit videotracks	Reassign issue
View public issues	Edit issue reporter
Create Issue	Edit issue watchers
Comment Issue	Edit issue visibility (Public on/off)

### 3.4 License Monitoring

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This feature allows license administrators to monitor whether Revizto is adopted well by the team, how actively it is used. It also allows checking the need for Plan extension.

The **Manage Users** and **Manage Projects** screens allow to build activity charts for, respectively, user and project activity. Both are updated on the daily basis.

The User activity chart displays the number of users that were active in Revizto within the required period. Also, you can filter users by their license role.

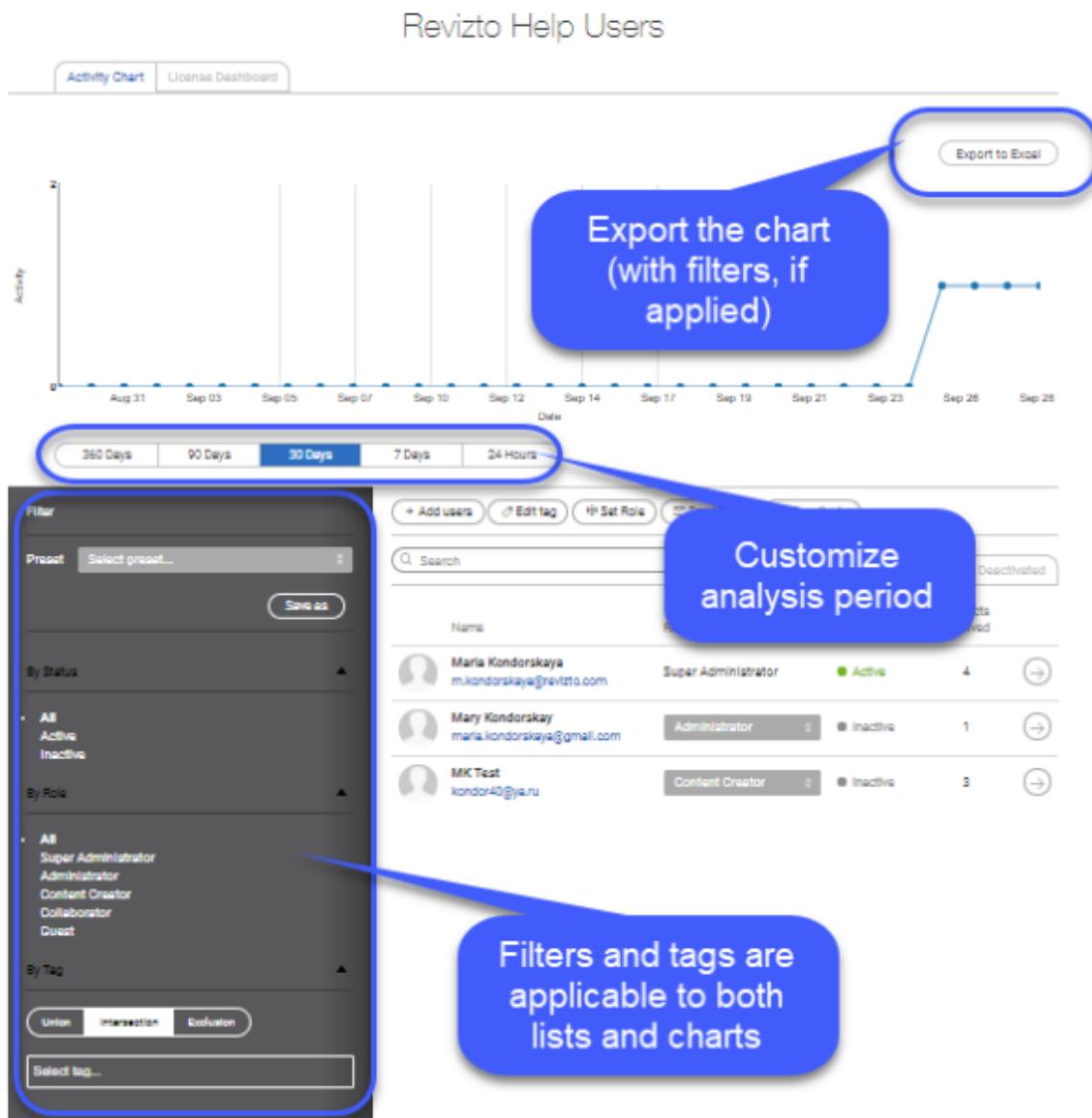
An excel version contains full user data (name, email, role, last activity time, total duration in the Active status, tags, number of projects and their names). The chart is also included.

The Project activity chart displays the number of projects managed in Revizto within the required period. Also, you can filter projects by status (**Active/Inactive**).

An Excel version contains the total number of members and their names, project owner, project tags, time of the last activity within the project. The chart is also included.

**Tip:** To build a chart for activity of specific users within a specific project, [tag](#) those users and create a [preset](#).

The **License Dashboard** tab shows how many project and user licenses are now used.



Activity charts for separate users/projects are built in a similar way with relevant filtration options.

### 3.5 Interface Tips

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## Using Tags

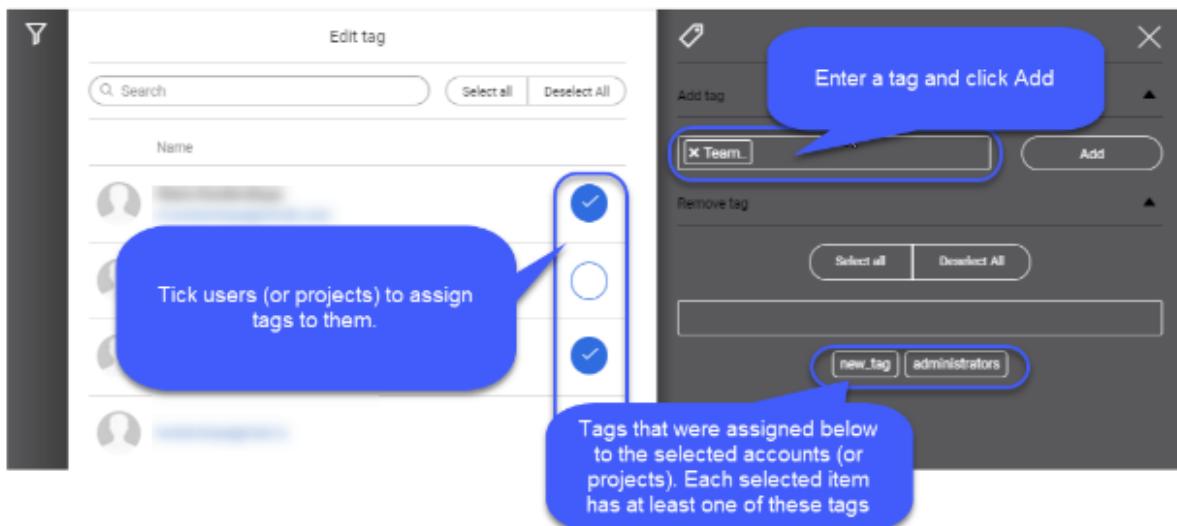
You can create and assign an unlimited number of tags to user accounts and projects. Tags provide an additional filtration options in large environments.

User and project tags are created in a similar way. To create and edit tags you need SuperAdmin, Administrator rights or Content Creator rights (limited to your own projects and relevant user accounts).

Tags are created either from views where projects/users are listed (preferred option when several items have to be tagged), or from individual user/project views.

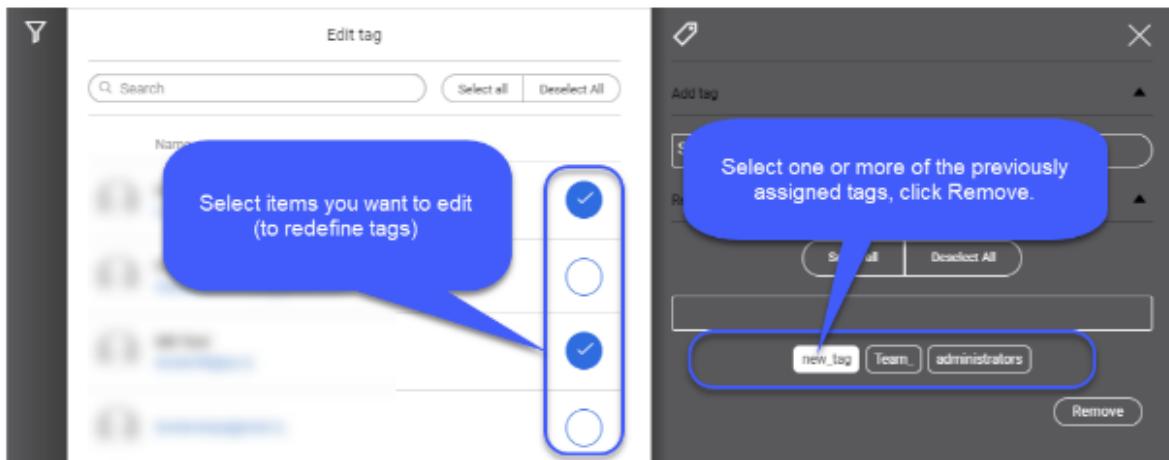
To create a tag from a general view:

1. Click the **Edit tag** button above the project/user list.
2. Select accounts/projects you want to tag. Enter your tag/s, click the **Add** button.



3. To return to the main view, click **X** button at the upper right corner.

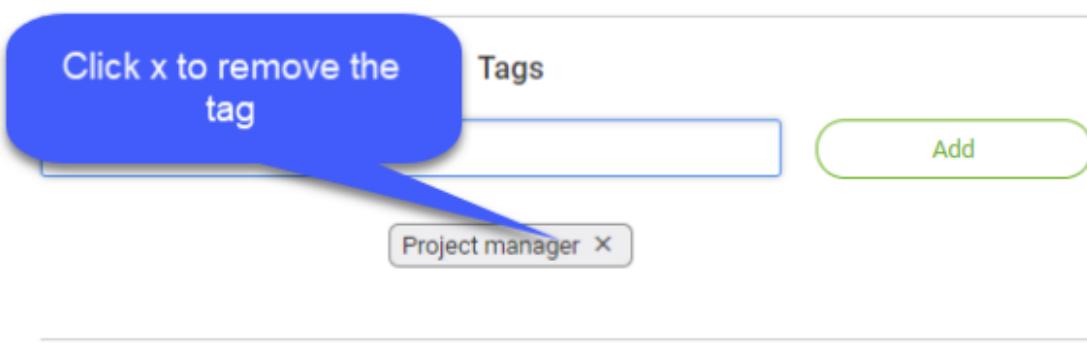
To remove tags, use the same window (see the image below).



To tag an individual project/account:

1. Open a project/user view. Both views have the **Tags** area.
2. Enter tag/s into the textbox and click **Add**. The application adds your tag/s to the item; assigned tags are displayed under the textbox.

To remove a tag, click **x** in the tag box (see the image below).

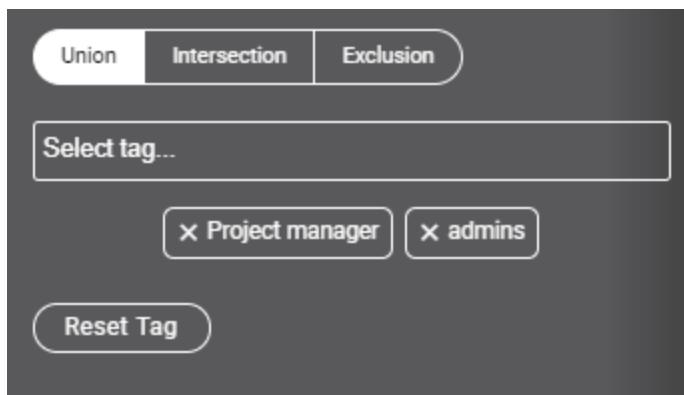


## Using tags for filtration

Mainly, tags are used to filter project and user lists in major environments. In both lists tag-based filtration uses similar logic.

To filter items by tags:

1. Click in the **Select tag** text box to show the whole list of available tags.
2. Choose one or several tags to filter by.
3. Choose filtration logic. The following options are available:
  - **Union** - includes items with at least one of the selected tags into filtration results
  - **Intersection** - includes items that have all selected tags into filtration results
  - **Exclusion** - includes items that have none of the selected tags into filtration results



## Creating Filtration Presets

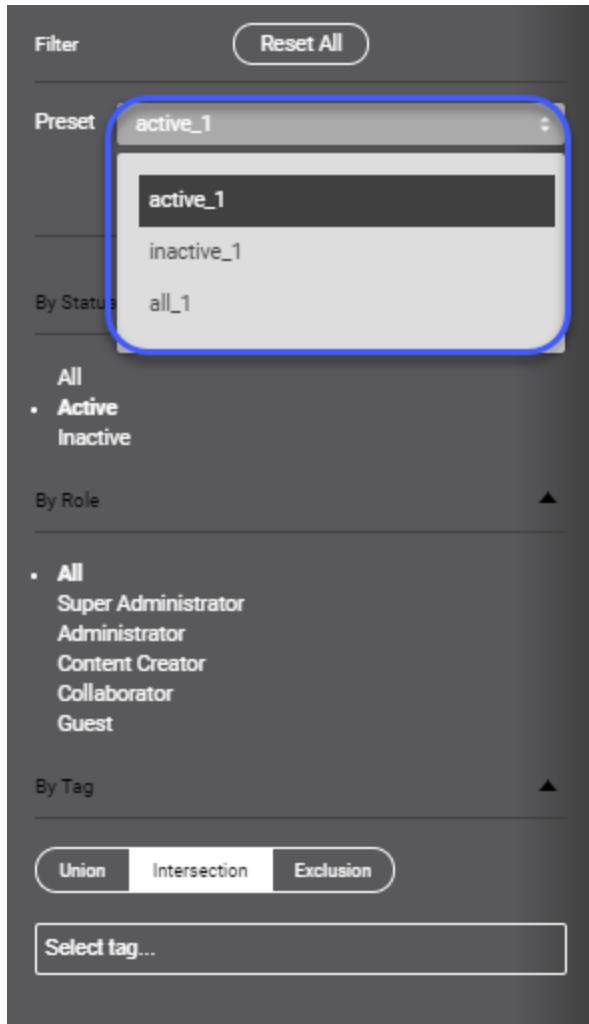
Filtration presets allow administrators to quickly filter lists of licensed items (users and projects) and to build several [charts](#) with different settings for comparison. E.g.: a 30-day

activity chart including collaborators with a specific tag, or a weekly chart for active projects with specific tag etc.

To create a preset:

1. Navigate to the **Manage Users** or **Manage Projects** page (depending on your needs).
2. Define your preferences in the filtration pane on the left.
3. Click **Save as** button. Enter the preset name in the **Preset** field and click **Save** button.

Your filter is saved and becomes available for selection.



## IV Exporting Files to Revizto

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