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# Introduction

Revizto is a BIM collaboration toolkit compatible with Revit, Navisworks, AutoCad, ArchiCad, SketchUp, Rhinoceros for Windows. Revizto allows project participants to :

- share project models and review them in several friendly formats (game-line viewing and navigation options)
- report, process and monitor issues
- communicate in real time

Revizto toolkit includes:

- plugins for every supported source tool
- core application for viewing exported models, collaborating and managing projects
- additional viewers tailored to popular viewing formats for additional presentation options
- model export management application
- web GUI for [license management](#)<sup>D29</sup>
- VR functionality

Revizto relies on cloud technologies, so you can collaborate 24/7, worldwide.

TOPIC UNDER CONSTRUCTION

## 1.1 Technical requirements

## 1.2 Terms and abbreviations

Term	Definition
Revizto Application	Core software component of the suite
Revizto viewer	Revizto offers several viewers that have full collaboration functionality, limited project management options, but offer extended viewing, presentation and walking options, in particular, each viewer is tailored to support a specific set of gaming controls/devices (e.g. WASD, Xbox, OCULUS, Vive).
Revizto export scheduler	
Revizto plug-in	
Revizto model	

Term	Definition
<b>Revizto scene</b>	
<b>Revizto license</b>	A fee-based license issued to a company for a specific number of users and projects. Typically it is provided for one year. To get familiar with the product, you can get a demo version which is free, though has limitations and is provided for a limited period.
<b>Revizto user</b>	
<b>Revizto license role</b>	
<b>Revizto project</b>	
<b>Revizto [project] access level</b>	
<b>License owner</b>	Same as SuperAdmin
<b>Revizto region/geography</b>	Revizto cloud sharing architecture largely depends on geographical settings (team members using the same license have to choose the same geography within the program). This implementation option saves resources and ensures faster operation. Currently there are six key geographies: North America, Europe, South America, South East Asia, Australia. For China the service is offered as well, yet, it relies on different servers (due to the local legislation)

## Role Guides

This section provides concise Revizto user road-maps with regards to their license roles. If reading the web version, click on each step, to expand detailed guidelines.

### 2.1 License Owner

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

- I. 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).



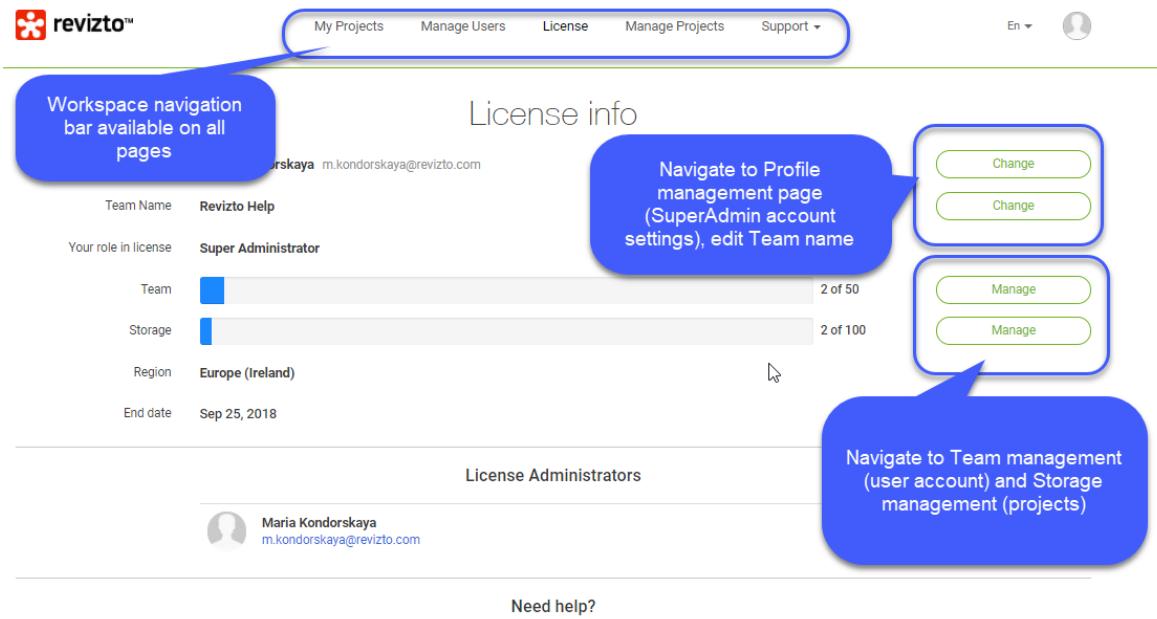
Sign in

E-mail	m.kondorskaya@revizto.com
Password	.....
<a href="#">Forgot password</a>	
Region	Europe (Ireland)
<input type="button" value="Login"/>	

**Figure 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).



**Figure 2 - License Info Screen**

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

II. ☐ 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](#)<sup>□5</sup>
- [Monitor user activity](#)<sup>□40</sup>

Revizto Help Users

The screenshot shows the Revizto User Management interface. At the top, there are tabs for 'Activity Chart' and 'License Dashboard'. Below the tabs, a date 'Sep 14' is displayed. On the right, there is a button 'Export to Excel'. The main area shows a list of users with columns for Name, Role, Status, and Projects Involved. Each user has a circular icon with a right-pointing arrow next to their name. A blue speech bubble points to these icons with the text: 'Manage user accounts on this page'. To the left, a large blue speech bubble points to the filter panel with the text: 'Create a convenient user list display. Note how you can use tags for filtering'. The filter panel includes sections for 'Preset' (with a dropdown menu), 'By Status' (with 'All', 'Active', and 'Inactive' options), 'By Role' (with 'All' and a list of roles: Super Administrator, Administrator, Content Creator, Collaborator, Guest), and 'By Tag' (with 'Union', 'Intersection', and 'Reduction' buttons and a 'Select tag...' input field). A blue speech bubble at the bottom right points to the user profiles with the text: 'Navigate to individual user profile'.

#### 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 users by entering several email addresses in the textbox (use comma for division). For other [group actions](#) see below.

There are five roles at the license 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 users 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 the user 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 the 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 user/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 users 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 a user.
2. Open the list of deactivated users (**Deactivated** tab).
3. Click **Delete** at the top of the list that is available in this view.

Name	Role	Projects Involved	Deactivate date
	Collaborator	1	September 26, 2017

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.



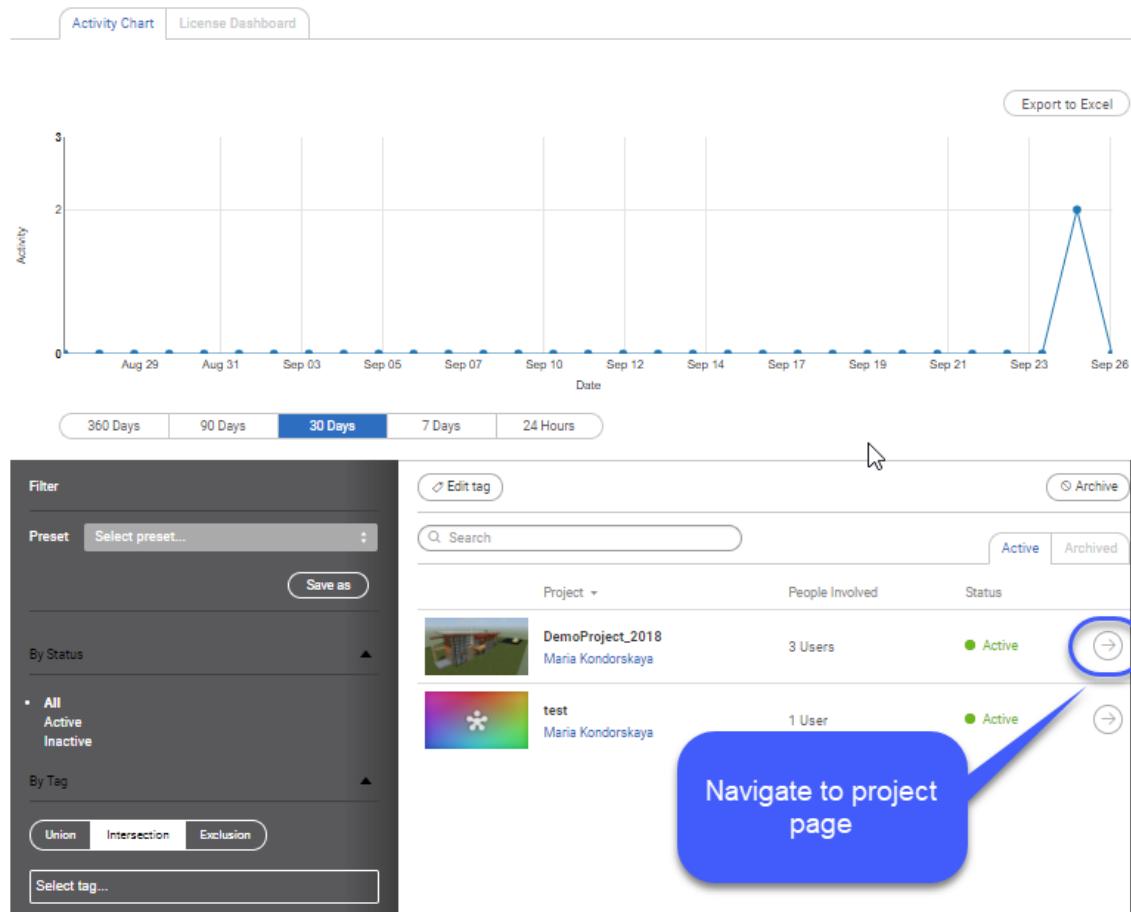
### III. Project license management.

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 (for more details on project roles, please, [see below](#))).

Newly created projects are listed on the **Manage Projects** screen 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 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 issue 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    Updated: September 25, 2017

Tags

demo [x](#) new\_tag [x](#) [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 a user 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. Project owners can create project-level access rights from Revizto application.

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	Search
[User Icon]	Owner	[Edit] [Delete]
[User Icon]	Administrat	[Edit] [Delete]
[User Icon]	View and collaborate	[Edit] [Delete]



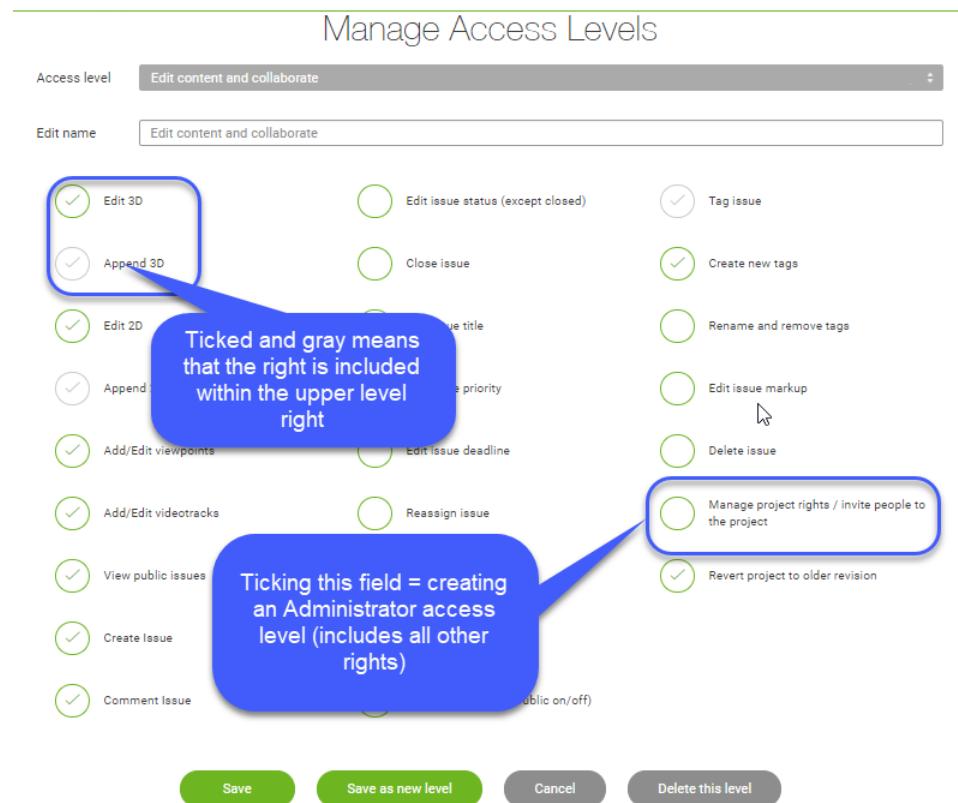
## Manage access level

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

### To create a new access level in the Web GUI:

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

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



### 3. To edit an existing level:

- Tick rights that you want to assign to the role, if you want to extend the access level
  - Untick available rights to revoke them and limit the access level in some respect
  - Enter a new name for the access level in the **Edit name** field, if needed.
  - Click the **Save** button at the bottom of the view.
- 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 on user rights with a modification option available at the top of the screen.

## IV. 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 users 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.

## 2.2 Project Manager

Project manager is likely to be a Project owner or project Administrator of a project responsible for the project life-cycle. In Revizto it includes the following stages:

- I. Project creation.

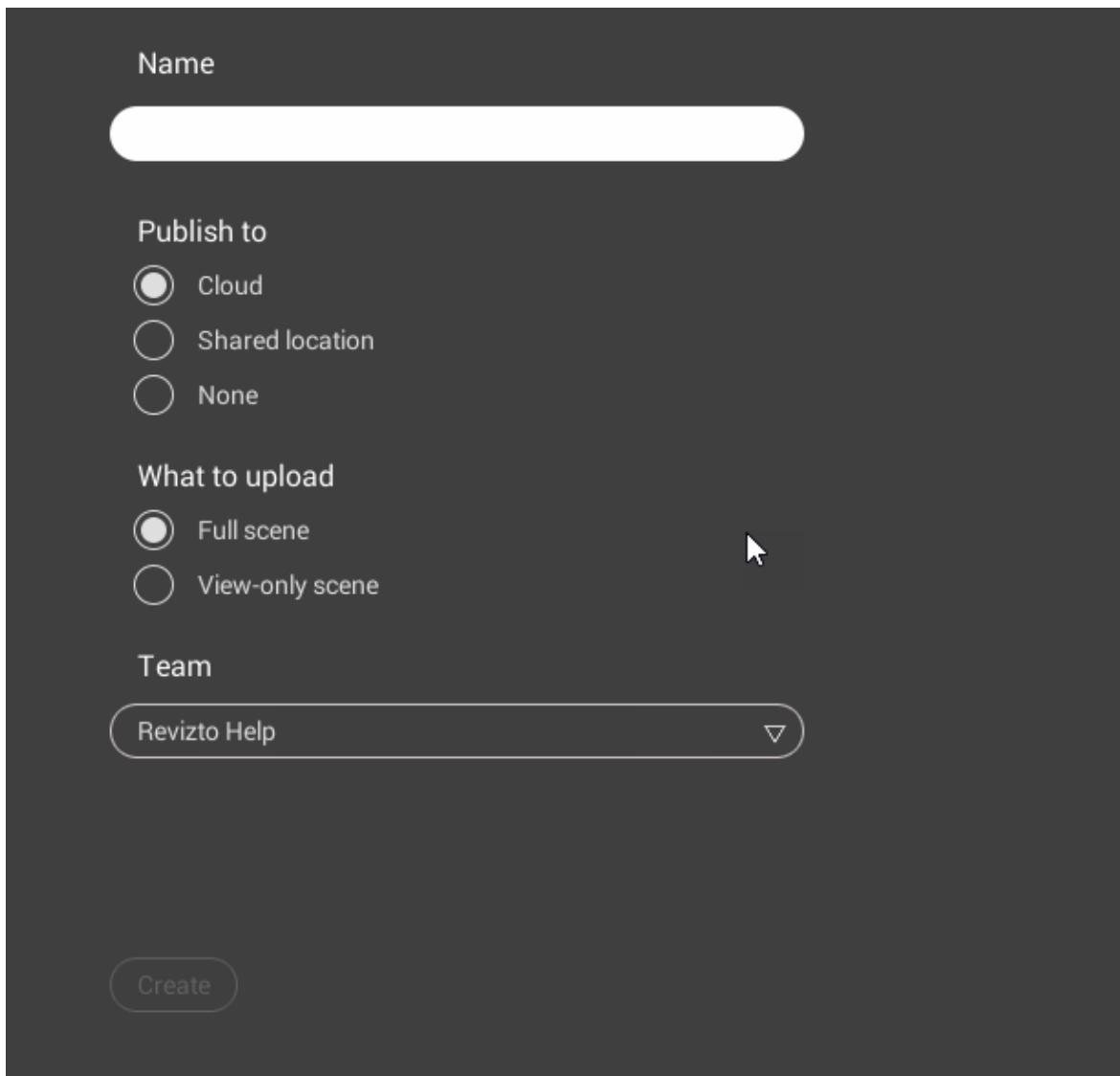
There are two points where a new collaboration project can be created:

- Revizto Application
- Revizto plug-in in a source program

The preferred option depends on the business process. Note that to create new projects, you need at least Content Creator license role because each new project requires a license.

### To create a new project in Revizto:

1. Go to **Project > New** in the main menu.
2. Fill in the form that opens.
  - a. Enter the project name.
  - b. Choose where the project will be published. Cloud is the preferred and recommended option. Revizto offers highly available clouds powered by Amazon servers. If cloud storage is selected, all project data (models and issues) are exported to it. Shared location implies that models are stored locally (e.g. on a server available to all team members) while user data, issues and related data is uploaded to the Cloud. None means that Revizto will only be used locally (i.e. not synchronized/published). Note that, while the option is available as some customers request it for security reasons, it is not recommend it and prevents the customer from using Revizto to its full potential. Also, even if you prefer not to share data, you will still need to connect the web once in while to register and manage the license, edit access rights, etc.
  - c. Choose whether to fully upload models (with all the background data and properties exported from the source program) or to upload view-only scenes (presentation option).
  - d. Choose team. By default the current license name is selected. You can choose another team if you have several active licenses or collaborate as a guest within several teams.



3. Click the **Create** button.

At this point the project is considered created and information about it appears in the Web-GUI. A project license is used. Although you are automatically redirected to the team building view, you can stop now and get back to team creation later. Same is true about model upload. You can create an empty project and later upload content to it.

**To create a new project from Revizto plug-in:**

1. Launch the [export process](#)<sup>D54</sup> in any source program and choose the **Create New Project** option. For more details on export, see the relevant [section of this Guide](#)<sup>D54</sup>.

Note that when a new project is created via a plug-in export and model creation are carried out immediately. Yet, the project remains local and not added to the license until you edit its properties.

2. Open Revizto and find your project in the project list (to find it quicker, limit your search

to local projects).

3. Double-click on the project tile to open it. Click the **Sync** button at the top menu.
4. Define your sharing, publication and licensing settings in the form the opens (similar to the project creation screen described above).
5. Click the **Upload** button. Once uploaded, your project will be duly created with a license used.

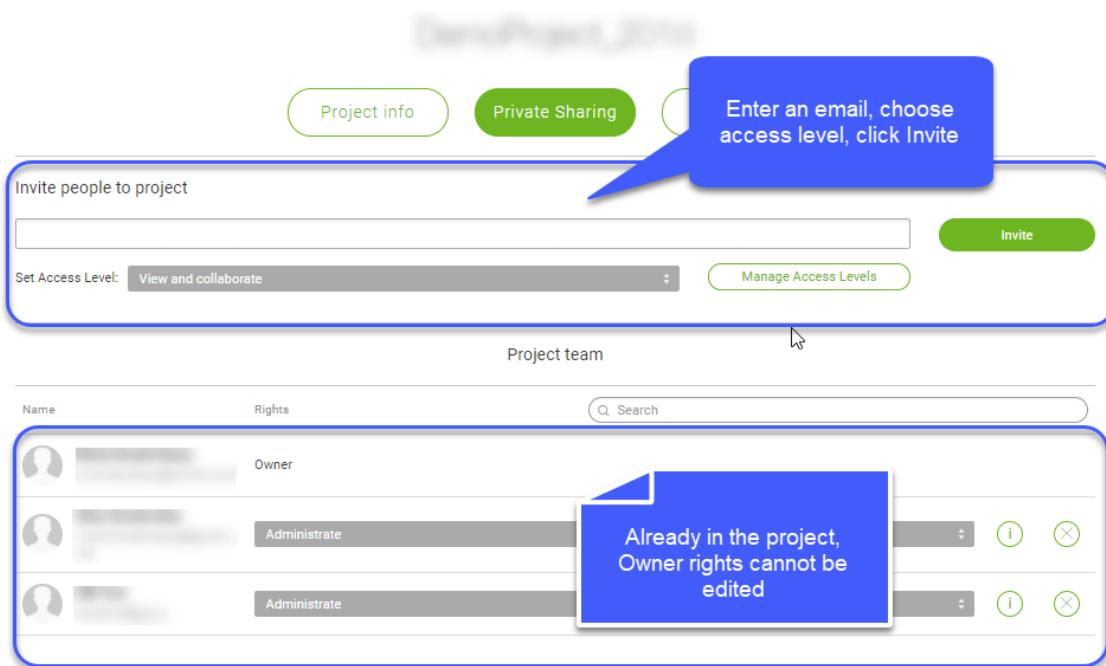
You can proceed to team creation and collaboration.

## II. Team creation.

### To invite a user to a project from the Web GUI:

1. Log in to your workspace.
2. Navigate to the **Private Sharing** view (**Manage Projects** > choose a project).
3. Enter a valid email address of a person you want to invite. Choose an access level in the **Set Access Level** field.
4. Click the **Invite** button.

The user will then receive an invitation email from Revizto and will be able to download Revizto and join the project.



### To invite a user from Revizto application:

- 1.

**UNDER CONSTRUCTION**

## III. Access level management.

By default, there are three access levels available in Revizto projects:

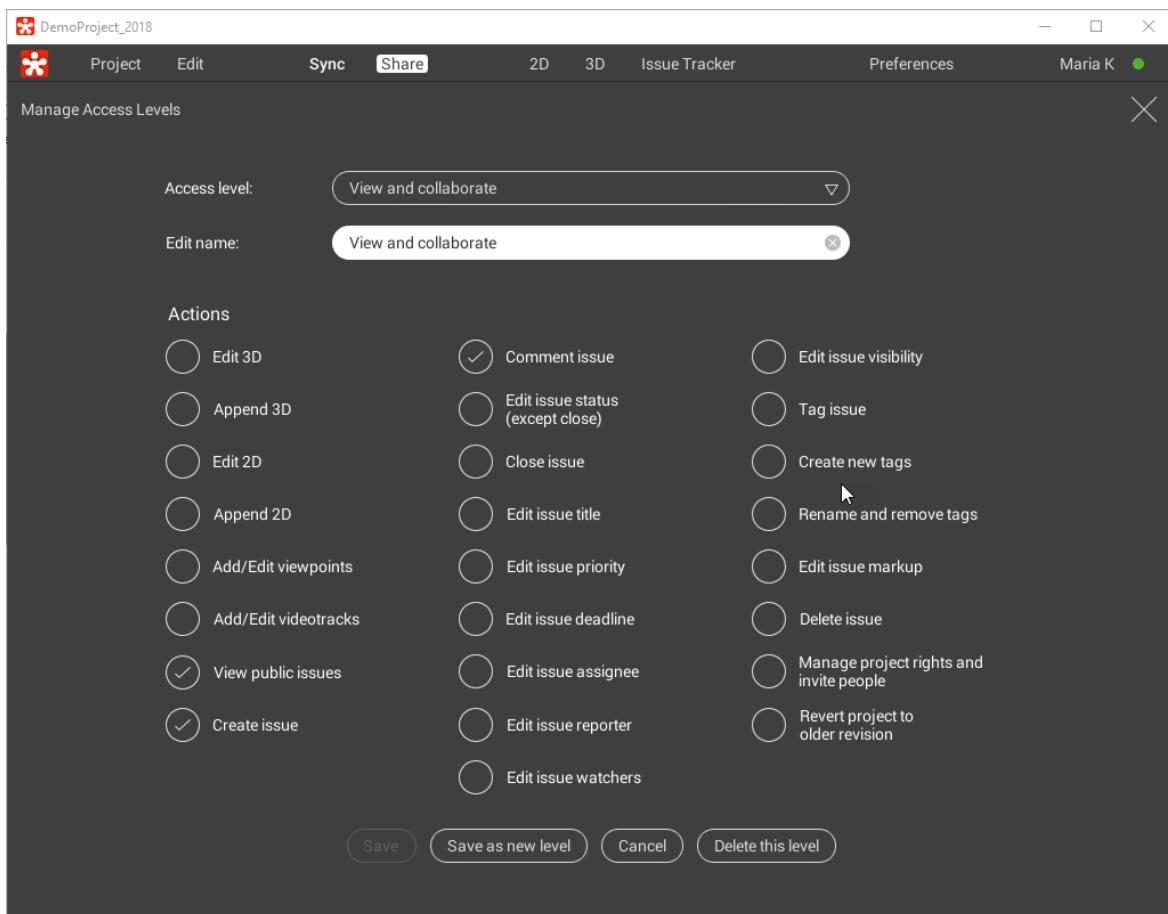
- Administrate
- Edit content and collaborate
- View and collaborate

Project owners can edit/create project access levels. Note that changes they make are only applied at the project level (unlike changes made by the [License Owner](#)<sup>D3</sup> (the SuperAdmin) or by a license level Administrator in the Web GUI).

Any time you invite a new user to your project, you have to assign rights to them. Note that if an invitation is issued to a person who has no team-level license, a collaborator/guest license is issued to them simultaneously.

#### To edit/create a new access level in Revizto application:

1. Open a project.
2. Go to the **Share** screen.
3. Click the **Manage Access** button.
4. Repeat steps 3-4 of the procedure provided for the Web GUI [access rights editor](#)<sup>D38</sup> (the interface form is similar to that in the Web GUI). Note that you have to be the project owner, or license level Administrator/SuperAdmin to edit project access rights.



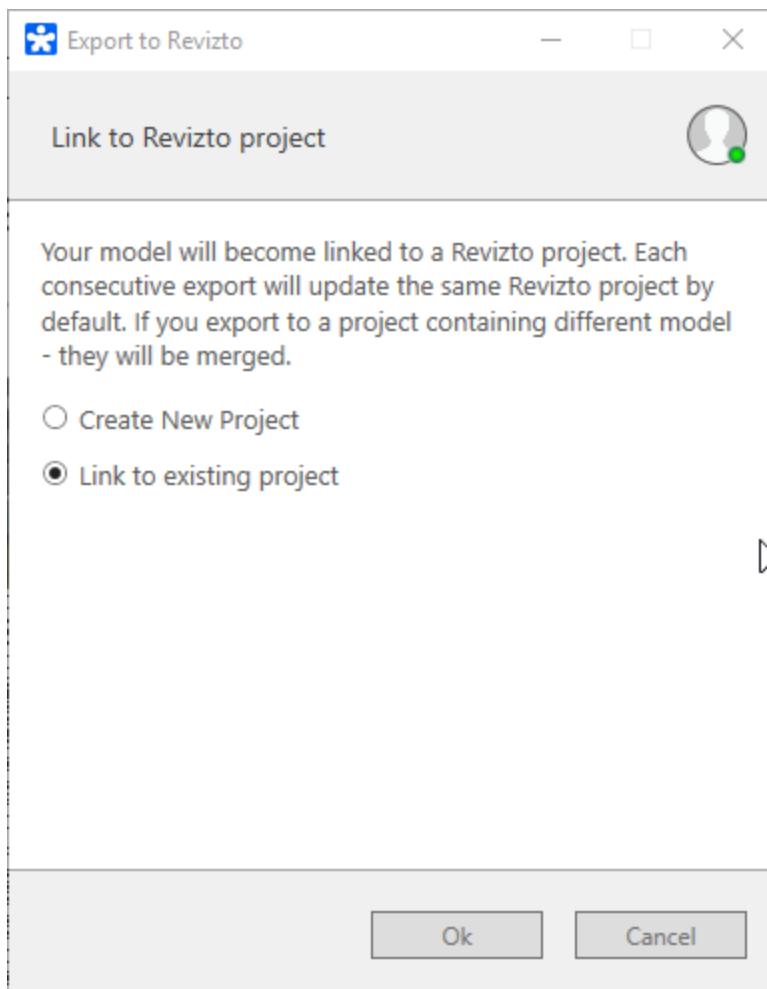
Note that even a project administrator cannot edit their own access rights.

#### IV. Export configuration and scheduling.

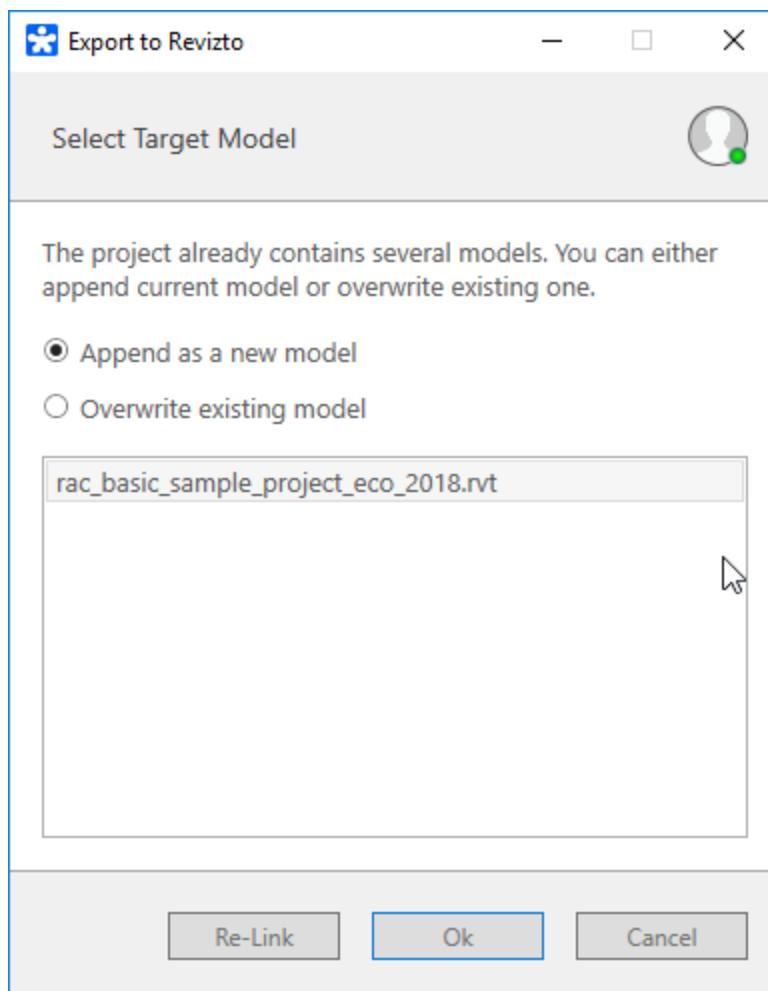
### General Procedure

In general, all supported source files are exported to Revizto according to a standard 4-step procedure implemented via the Revizto plugin. Particularities of specific sources are described below.

1. Open the view you want to use for export in the source program. Note that Revizto export operates under the “you see is what you get” principle, so the final Revizto view will be based on what you choose in the source program.
2. Click the Revizto plug-in menu.
3. Click the ***Export to Revizto*** button.
4. Choose whether to create a new project or link files to an existing one. Note that you can link one source to multiple projects.



5. For an existing project, choose whether to overwrite existing files or to append new files to them. Files are appended on the basis of shared coordinates. For a new project, enter project name.



6. Define export options (differ for each source program). This is the most important step where accuracy is required. Most part of export errors and problems are caused by misinput at this stage and/or incorrect selection of the exported view (step 1). Most frequent problems and particularities of each source program are covered below.

Export and further Revizto model generation is based on source elements: viewpoints, materials, levels, phases (the exact list depends on the source software).



7. Launch export. When export completes, Revizto starts automatically (unless already running) and displays the result.

Note that, if you created a new project, you will have to define sharing options for it and manually upload it for the first time (if shared).

## Relinking Projects

You can link one source to multiple Revizto projects. To relink your source, click the **Link Settings** button of the Revizto plugin. It initiates the dialog which allows you either to create a new project or to link your file to an existing one (i.e. to change the link).

## Export Scheduling

When you create an export schedule, you can redefine export options again. Note that the scheduling option is unavailable to users with view and collaborate level access.

Project export schedule can be defined/modified at two points:

- From Revizto plugin

- From Revizto Export Scheduler Application

Note that project export scheduling options and statistics become available in the application only after you initially define them in Revizto or via the relevant plugin.

## Using Revizto Plugin

To create an export schedule:

1. Open the plugin in the relevant source program.
2. Click the **Export Scheduler** button. The schedule builder loads in a popup.
3. Redefine export options and relink the source, if needed.
4. Create the export schedule. You can choose several days of the week and define time (the same for all days).
5. Note that if the project has been earlier shared and uploaded to the cloud, the Upload to the cloud checkbox appears in the form. Activate it to synchronize your project at each export.

Note that if synchronization settings are also defined in Revizto, they are updated according to the latest modification (the reverse will be true).

6. Click **OK** to save your settings. The new schedule is applied to the project and becomes available in the Export Scheduler Application that contains information on all export schedules within a team.



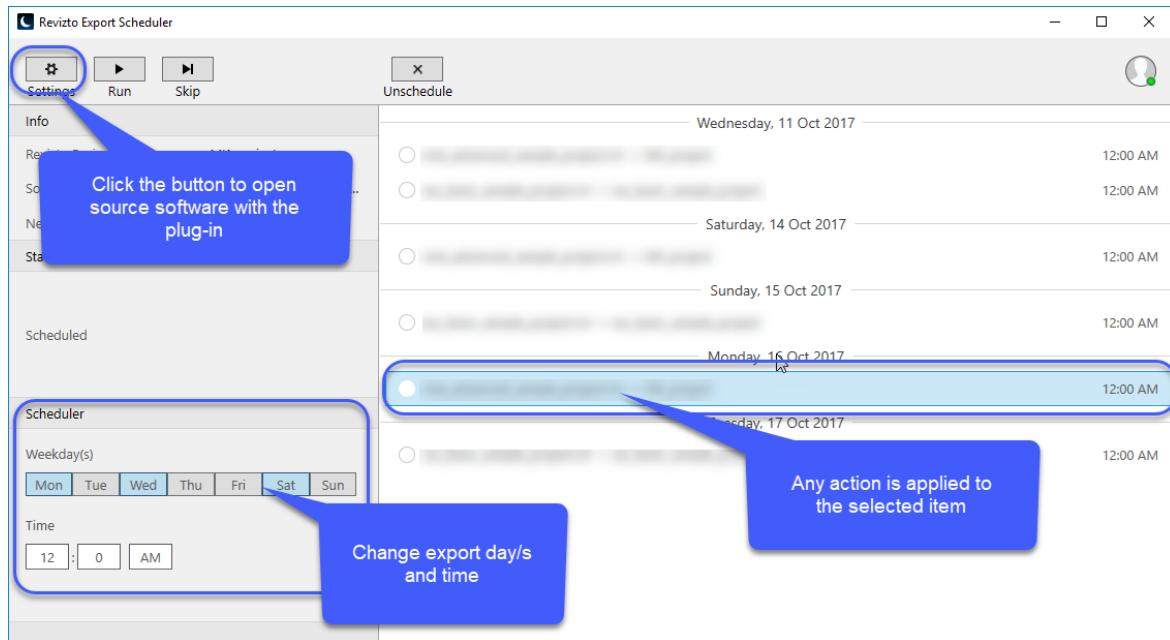
## Export Scheduler Application

The Export Scheduler Application displays all active export schedules. It can only be used when at least one schedule is created from a Revizto plug-in. Existing schedules are listed in the application with the source file and target Revizto project names indicated.

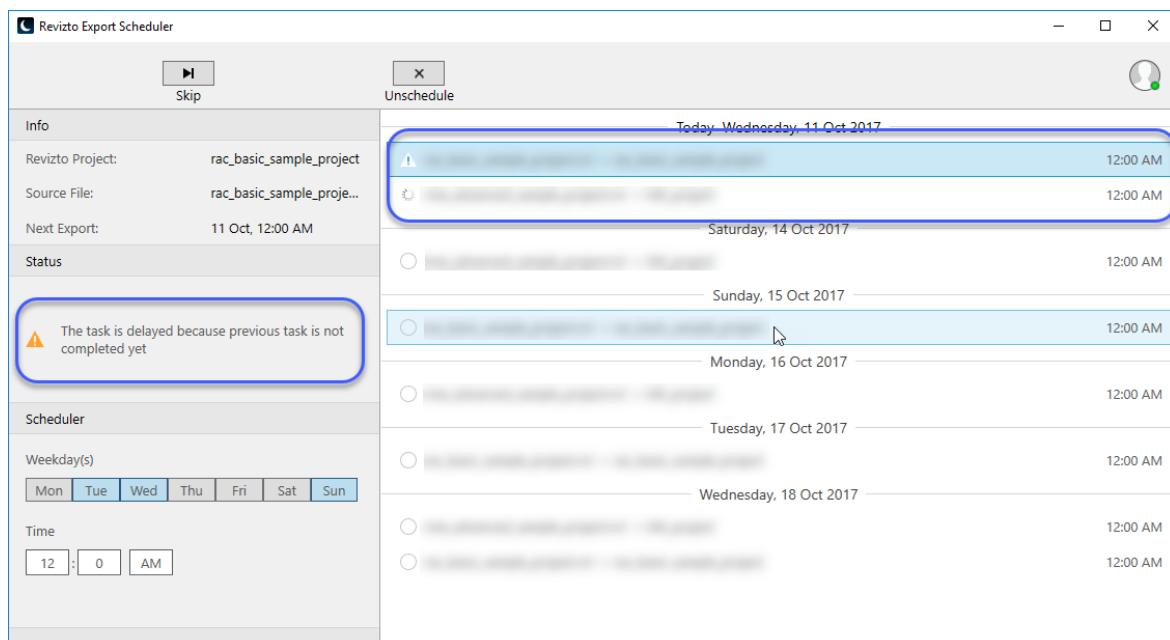
You can use the Export Scheduler to:

- run an export immediately for the selected schedule (click **Run**)

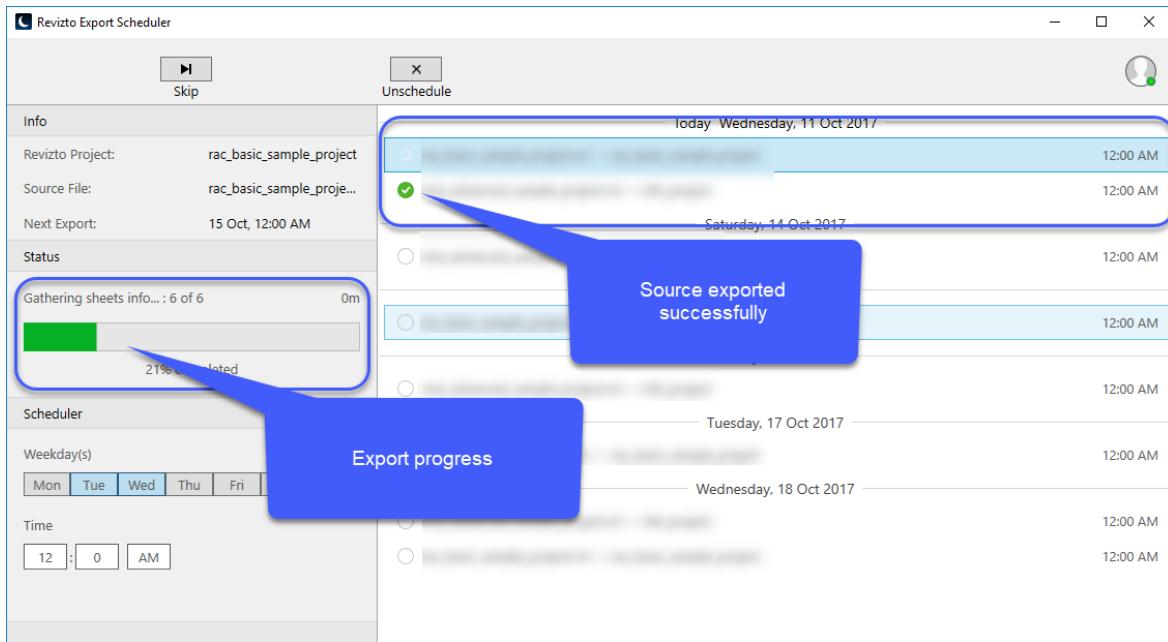
- unschedule an export for the selected schedule (click **Unschedule**)
- skip the nearest export for the selected schedule (click **Skip**)
- change schedule for the selected schedule (use the **Scheduler** area)
- redefine export settings for the selected schedule (click **Settings** to access the source file and relevant Revizto plug-in)



Note that even if two sources are scheduled to be exported at the same time, they are not exported simultaneously, but in turns.



When export time comes, the application launches and displays the progress and statuses.



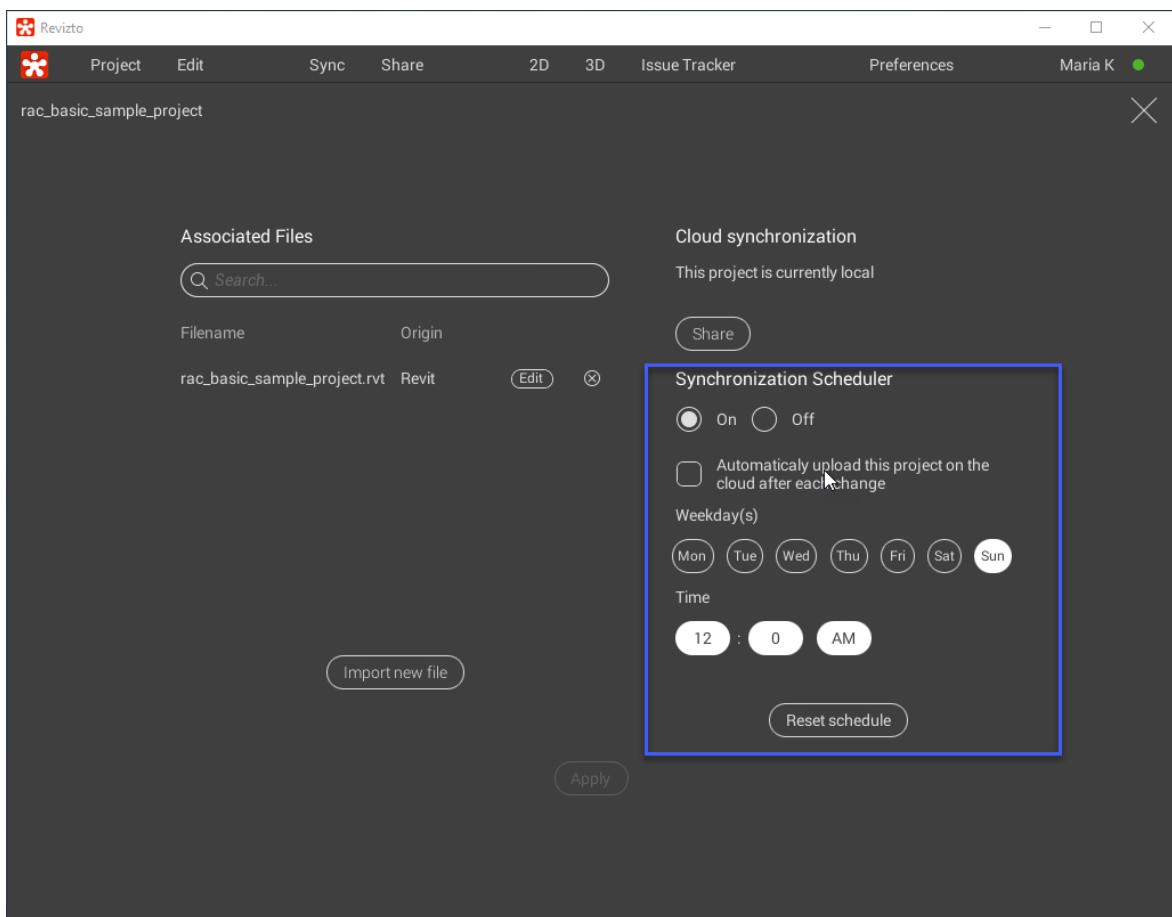
## Cloud Synchronization

Once export settings are defined, you can also define schedule for synchronizing Revizto project with the Cloud (or with the shared location).

### To set up the synchronization schedule:

1. Make sure that the project has been exported at least once and is available in Revizto.
2. Open the project and navigate to **Edit > Scenes and Scheduler**.
3. Fill-in synchronization preferences in the right part of the window. You can choose several days and define export time (one for all days). It is logical to have your synchronization schedule correspond to the export one.
4. Click **Reset schedule** to save your settings and the **Apply** button.

Note that when your project has already been shared the **Automatically upload this project on the cloud after each change** checkbox becomes available. Activate it to use this option.



Synchronization can also be scheduled from Revizto plug-in; if both scheduling options are used, the latest configuration is applied.

## V. Issue Management.

## 2.3 Content Editor

Enter topic text here.

## 2.4 Viewer

Enter topic text here.

# Licensing. Workspace Configuration and Management

Revizto license is provided for a specific number of users and projects (depends on the purchased 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

### 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](#)

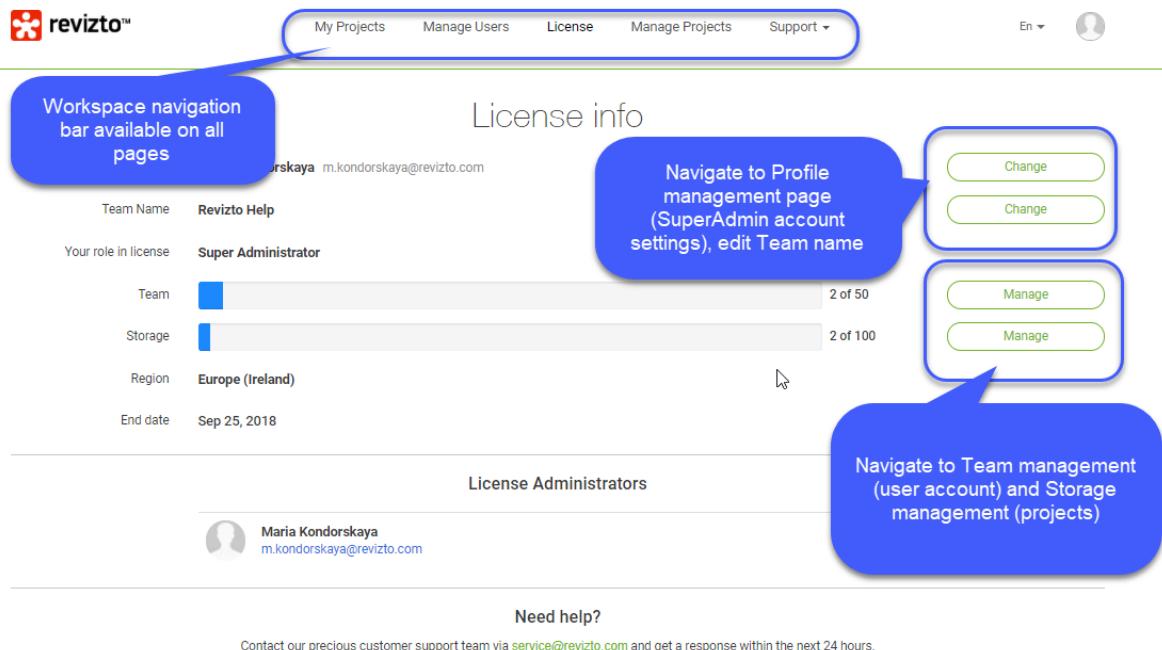
Region



**Figure 3 - 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. 4).



**Figure 4 - License Info Screen**

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

## 3.2 Managing 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](#)<sup>32</sup>
- [Monitor user activity](#)<sup>40</sup>



#### 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 users by entering several email addresses in the textbox (use comma for division). For other [group actions](#) see below.

There are five roles at the license 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 users 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 the user 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 the 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.

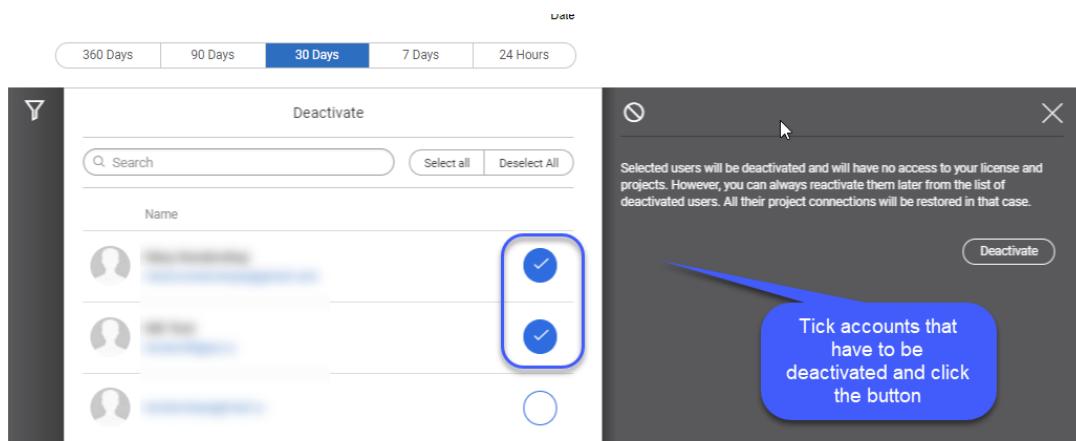
**Warning:** Neither the License Owner (SuperAdmin) nor the Administrator can edit user credentials. Therefore, make sure to timely deactivate users when people leave the company. Also make sure to duly transfer the License Ownership if the relevant employee leaves the company.

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 user/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.



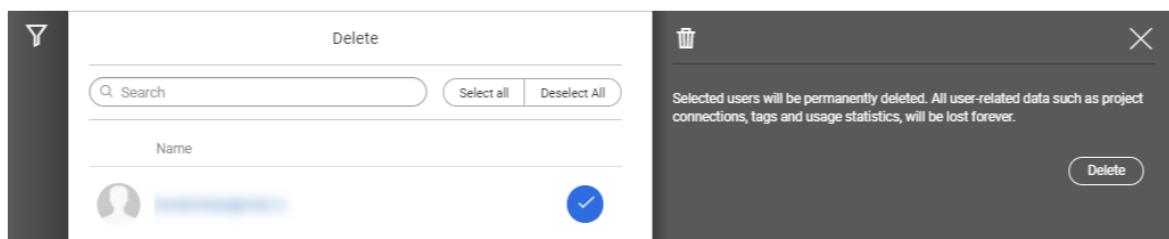
Deactivated users can be reactivated any time with the previous access level and project memberships. However, note that project ownership is not restored. At deactivation project ownership is automatically assigned to the SuperAdmin and reactivation does not reverse it. It is recommended to reassign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

#### To delete a user:

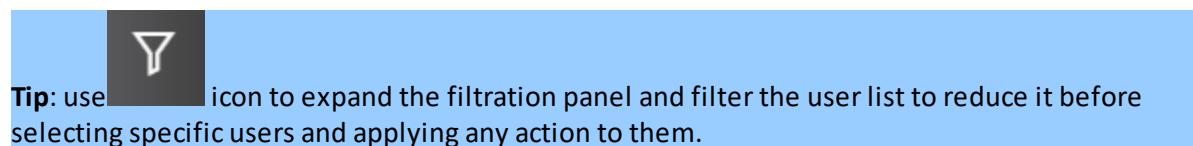
1. Deactivate a user.
2. Open the list of deactivated users (**Deactivated** tab).
3. Click **Delete** at the top of the list that is available in this view.

Name	Role	Projects Involved	Deactivate date
	Collaborator	1	September 26, 2017

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.



## 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 Management' screen. On the left, there's a 'Filter' sidebar with sections for 'Preset' (with a dropdown menu), 'By Status' (Active, Inactive), 'By Role' (All, Super Administrator, Administrator, Content Creator, Collaborator, Guest), and 'By Tag' (Union, Intersection, Exclusion). A blue callout bubble points to the 'Search' input field in the main header bar, which has a placeholder 'Search'. Another blue callout bubble points to a row of buttons: '+ Add users', 'Edit tag', 'Set Role', 'Send Email', and 'Deactivate'. The main area lists users with columns for Name, Email, Role, Status, and Actions. A blue callout bubble points to the 'Content Creator' role filter. A large blue callout bubble at the bottom right contains the text: 'Use search in addition to filters to filter the list before selecting specific users and applying any action' and 'Use these buttons to access group modification functionality'.

## 3.3 Managing Projects

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 (for more details on project roles, please, [see below](#)<sup>[38]</sup>).

Newly created projects are listed on the **Manage Projects** screen 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 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 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 invite to it. Yet, the project owner can access 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 issue 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

Owner: Maria Kondorskaya

m.kondorskaya@revizto.com

License: Revizto Help

Created: September 25, 2017

Updated: September 25, 2017

Tags

demo X new\_tag X

Change

Change

Change

Change

Change

Change

Change

Change

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 a user 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. Project owners can create project-level access rights from Revizto application.

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	<span>i</span> <span>x</span>
[User Icon]	Administrat	<span>i</span> <span>x</span>
[User Icon]	View and collaborate	<span>i</span> <span>x</span>

## Manage access level

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

### To create a new access level in the Web GUI:

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

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 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 detailed information on user rights with a modification option available at the top of the screen.

## 3.4 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 users 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 Web Interface Tips

#### Using Tags

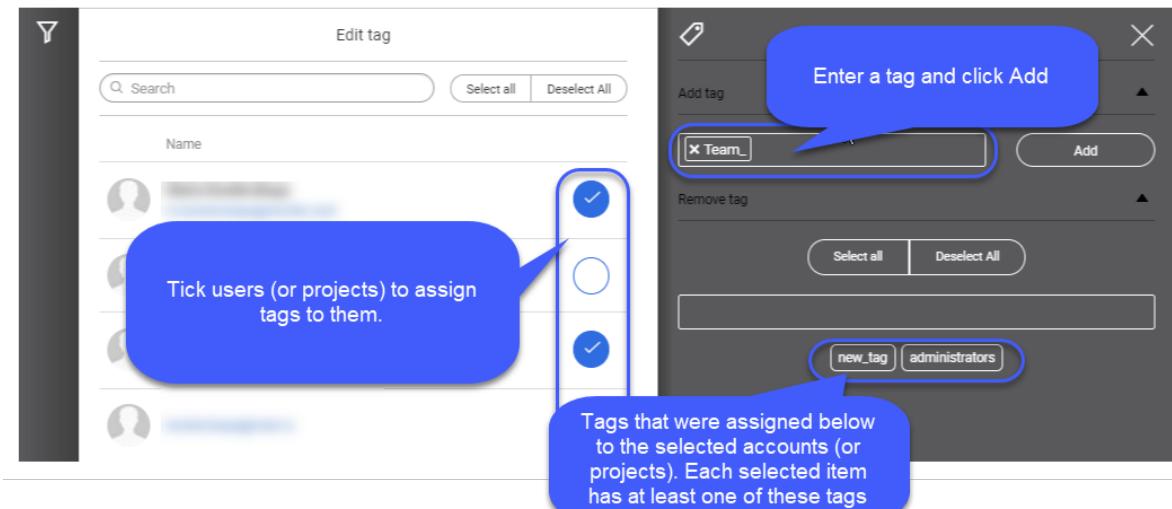
You can create and assign an unlimited number of tags to user accounts and projects. Tags provide an additional filtration options in large environments.

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.

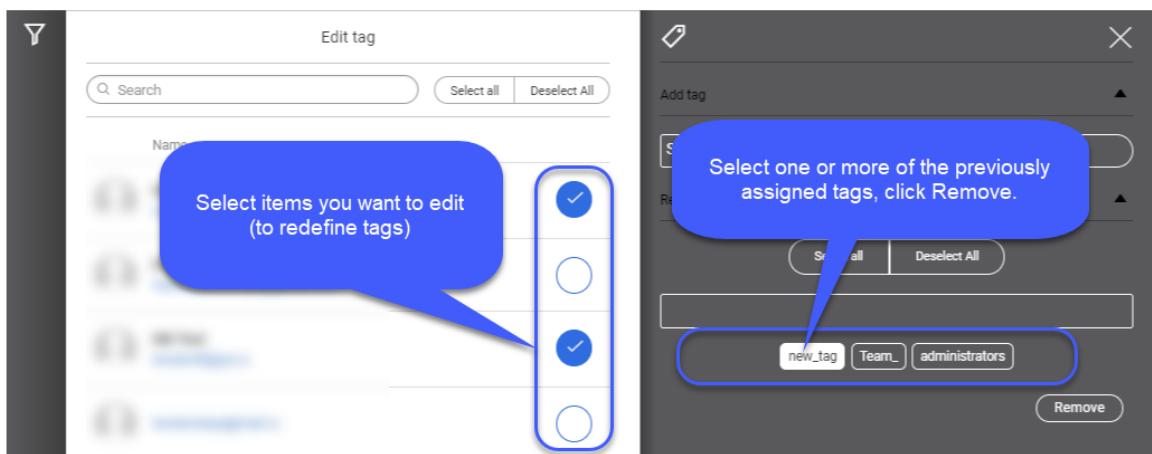
##### To create a tag from a general view:

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.

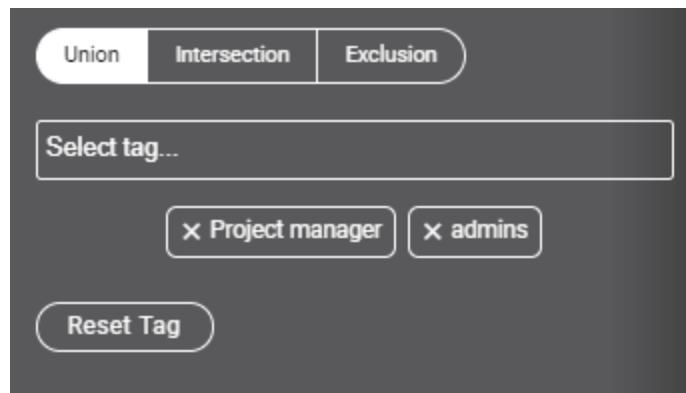
To remove tags, use the same window (see the image below).



#### 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 tax 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 the **Save as** button. Enter the preset name in the **Preset** field and click the **Save** button.

Your filter is saved and becomes available for selection.



## Installation and Deployment

### Local Installation. Windows

When a team license is issued to a customer, owner credentials are supplied by Revizto. Further configuration is performed at the customer side according to their business process and preferences.

To deploy a collaboration environment, you have to first activate the team license in the web-GUI (see the Licensing section) and then proceed to local deployment. Note that to ensure valid network collaboration, you have to pay attention network settings when installing local instances of Revizto, Viewers and plug-ins.

### Network requirements

If the company is using firewall, ports 80 and 443 have to be opened for Revizto. And the following domains must be allowed:

- \*.revizto.com
- \*.s3.amazonaws.com

If the company is using the proxy server, you need to set up proxy server settings in Revizto. In log in window click the Proxy server settings in the right top corner of the screen and fill in all required information.

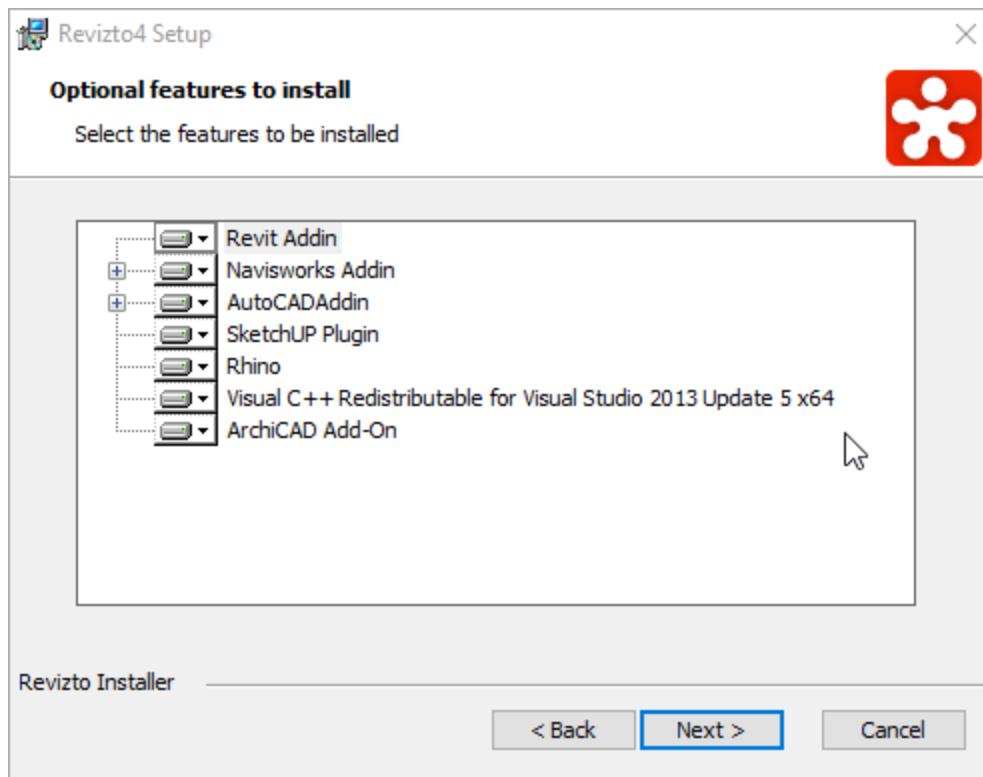
**Tip:** Revizto displays the current connection status in a circle by the name of current user. If everything is ok, the circle is green, if there are connection issues, it is yellow, if you are offline, it goes black.

Maria K



### Installation Process

To install the software suite, you have to either be the license owner who obtains the download link from Revizto, or a license user invited directly to the team or to one of its projects. The distribution package includes all Revizto components (Revizto, viewers, scheduler, plug-ins). The installation wizard installs Revizto and viewers, and allows the user to select optional components.



Generally, source editors need Revizto and plug-ins for software they work with (most popular ware Revit and Navisworks); collaborators on the customer (or management) side need Revizto and viewers. Thus, customers can review the model in a preferable display format, create issues and track them.

Also you can select your language and which shortcuts you want on your desktop.

The Wizard asks user permission to install certUtil.exe. It is safe to install this element and it is recommended to. It installs certificates that ensures smooth interaction with Revit and AutoCad (otherwise you will have to confirm that you want to use the plug-in any time you launch it).

From this point onwards the procedure is quite standard; just follow the wizard.

If a newer version of Revizto is available, notification is displayed at the launch.

**Caution:** If you plan to install a new version of Revizto instead of an existing one, do not uninstall it manually. The installation wizard detects traces of the previous version and attempts to uninstall it, as it is a part of its logic. Failing to find an old version, the wizard fails.

**Note:** When installing/updating Revizto, close source programs (e.g. Revit). Otherwise the installation process will stop.

Just as any software, Revizto can be installed for the current user and for all users of the machine. For the latter option you have to launch the wizard as the local administrator.

### **Quiet mode installation**

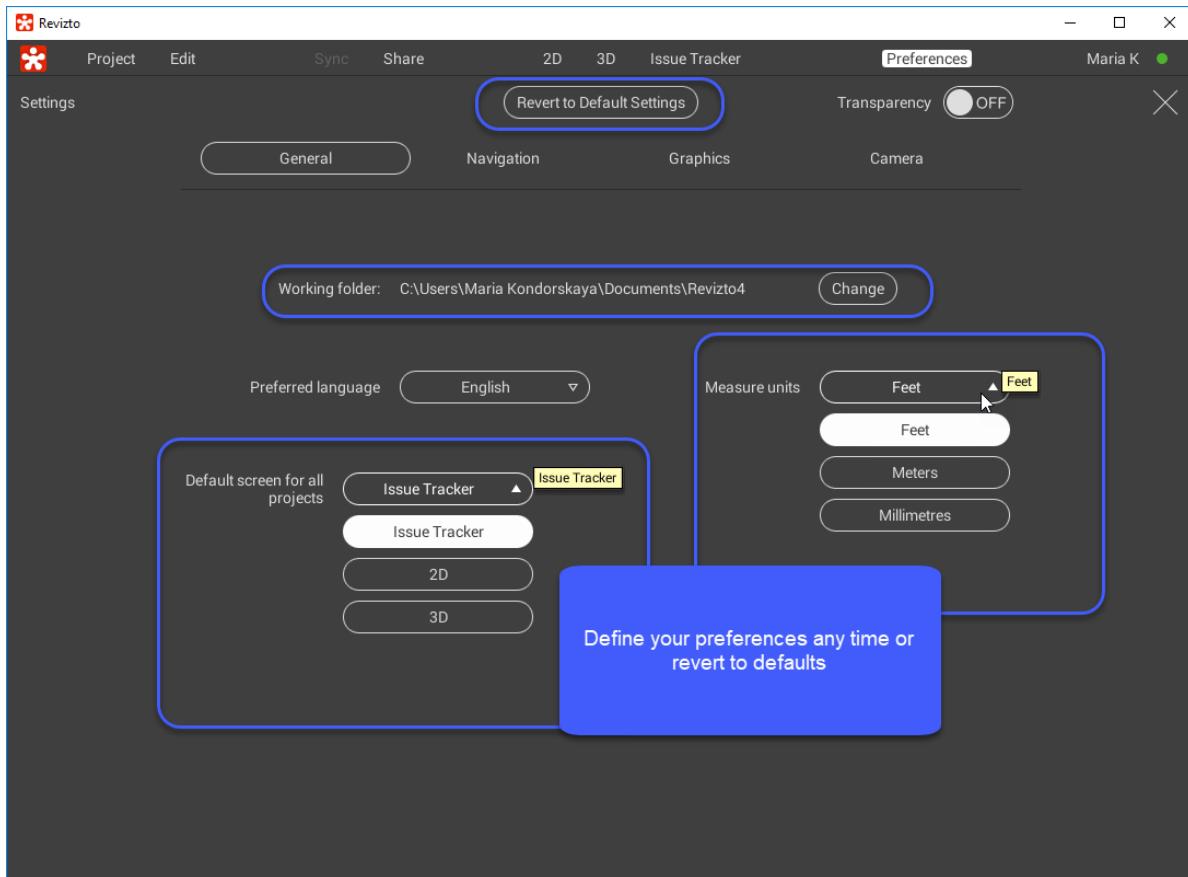
Revizto can be installed in the quiet mode (without UI) using the following keys:

- ALLUSERS="1"- installation for all users on this computer (per machine). Administrator rights are required.
- MSIINSTALLPERUSER="1" – installation for a current user (per user)

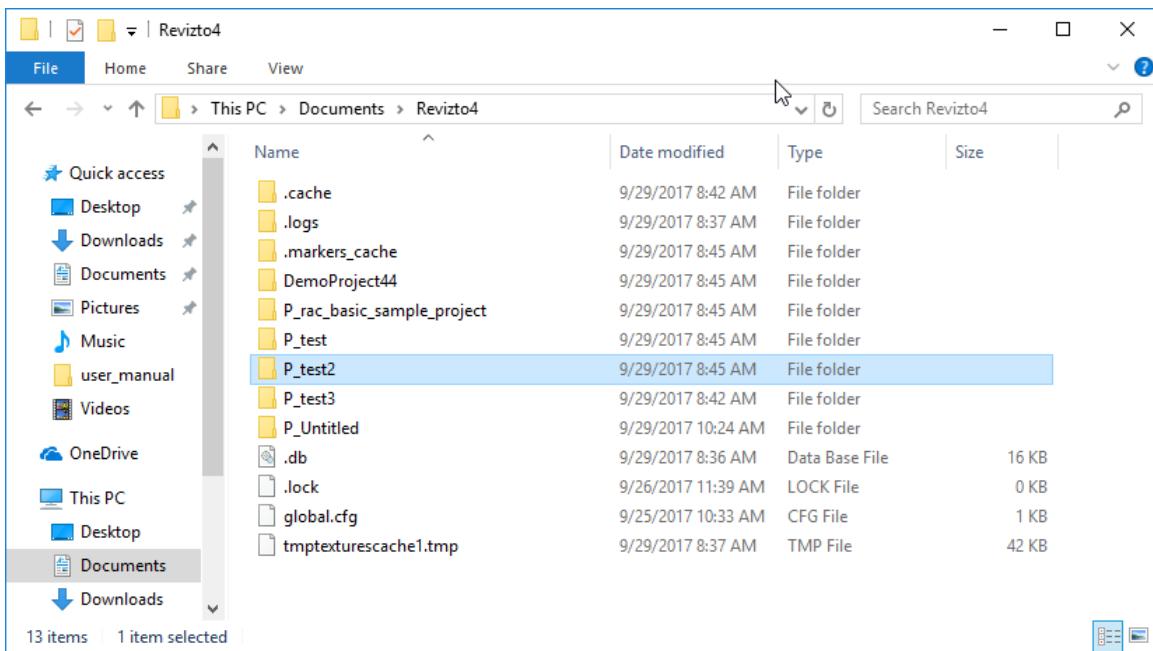
**Tip:** to quickly access the installation log, open the command line and enter “C:\MyPackage\Revizto(x64)-4.4.XXXXX.msi” /L\*V C:\MyPackage\ReviztoInstall.log” in it.

## Defining Preferences

Upon completing installation, launch Revizto and navigate to the **Preferences** menu. By default, the **General** view is displayed.



Define the preferred display settings, measure units. Note that you can change language any time. You can also change the default project folder. During installation the wizard creates a new folder in the Documents folder of the current user. This folder is used for synchronization: projects somehow available to the user are stored there and shared from there.



Note that this folder contains logs for all revizto components and events.

**Caution:** It is not recommended to create the working folder at remote network location. Revizto relies on SQL Light and major projects tend to generate multiple requests to the working folder. If created outside the local machine, it can cause failures and errors.

## Portable Devices

## Multi-User Installation. Windows

## Using the Web GUI

Each user (team member) has access to the web GUI where, depending on the access level, they can view or edit workspace and project settings, manage their personal profiles (account settings are available in Revizto as well).

**Note on regional settings:** you cannot change your region. Any Revizto license is strictly linked to one of the specific geographies. You can change your language settings any time from the web GUI or in Revizto preferences.

**Warning:** Although the sign in page allows changing the region, you should log in from the region of your team license. Otherwise you will not be able to access your projects.

# Sign in

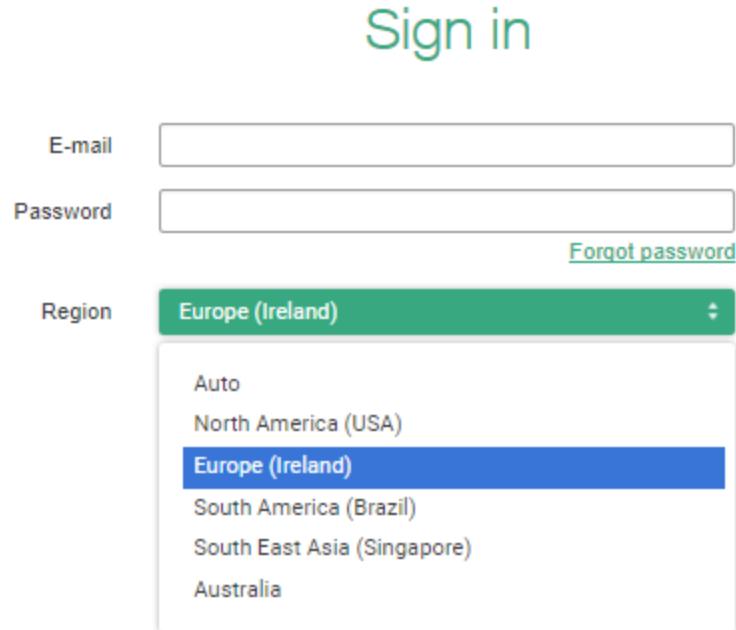
E-mail

Password

[Forgot password](#)

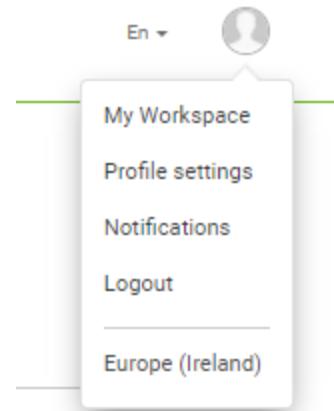
Region Europe (Ireland)

Auto  
North America (USA)  
**Europe (Ireland)**  
South America (Brazil)  
South East Asia (Singapore)  
Australia



## 5.1 My Projects

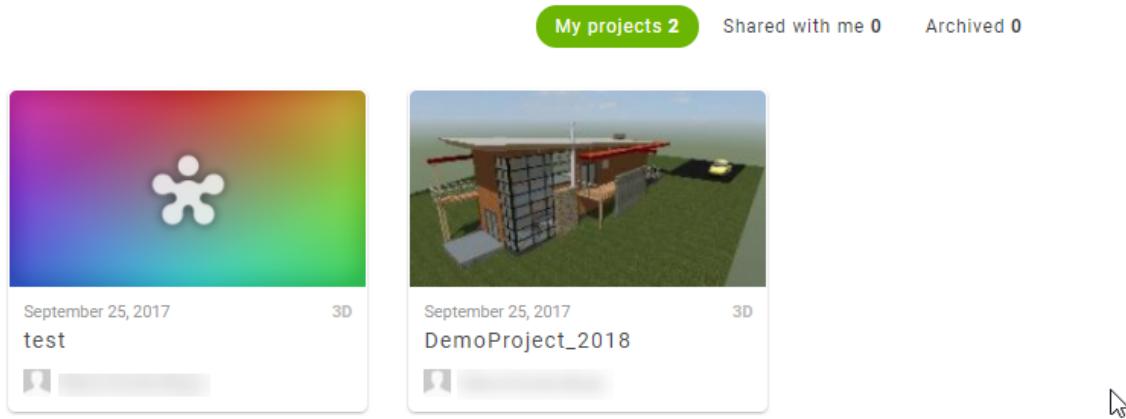
Regardless of an access level, a user can view their projects on the **My Projects** page. To navigate to the page, either use the main menu, or choose **My Workspace** in the profile drop-down list at the top upper corner of any page of the web-GUI.



It displays the list of projects a user is involved with. It has three views:

- **My projects** for projects created by the current user
- **Shared with me** for projects where the current user is a member (not Owner)

- **Archived** for closed projects



Each project tile shows the creation date, name and owner. Mouse-hover over a tile shows icons for navigation to the project **Private Sharing** view and to its **Dashboard**. If user rights are not sufficient for sharing, the view displays in the read-only mode.

## 5.2 Managing User Profile

Note that you can also change your profile settings in Revizto as well. The Web GUI allows users to change their names, passwords and language settings. Note that you cannot change your email, as it is linked to the license.

### To edit your profile:

1. Sign in at [www.revizto.com](http://www.revizto.com).
2. Choose **Profile settings** in the user menu (upper right corner).
3. Make necessary changes:
  - a. Enter necessary changes in the editable fields (**First name**, **Last name**).
  - b. Choose another GUI language in the **Language** field.
  - c. Click **Password > Change**, to enter new password. Enter the old password and the new one twice (for confirmation).
  - d. Upload your photo in the **Change picture** area, if you would like to have it in your profile.
  - e. Click **Save** to apply your changes.

## Profile settings



Change picture

First name

Last name

E-mail

Old password

New password

Confirm password

Language  

### Resetting Password

The Web GUI offers standard, transparent procedure for resetting lost passwords.

#### To reset your password.

1. Go to the sign in page at [www.revizto.com](http://www.revizto.com).
2. Click the Forgot password link.
3. Enter your valid email address linked to your Revizto license in the form and click **Change**.
4. Check your mail box (make sure to check the spam folder as well).
5. Open the email message from Revizto and follow guidelines (you will have to options to navigate to the password change page: a button and a link).
6. Navigate to the password change page. Enter your new password twice and click the **Change** button. Once the system applies changes, you will be able to enter the Web GUI.

## 5.3 Managing Notifications

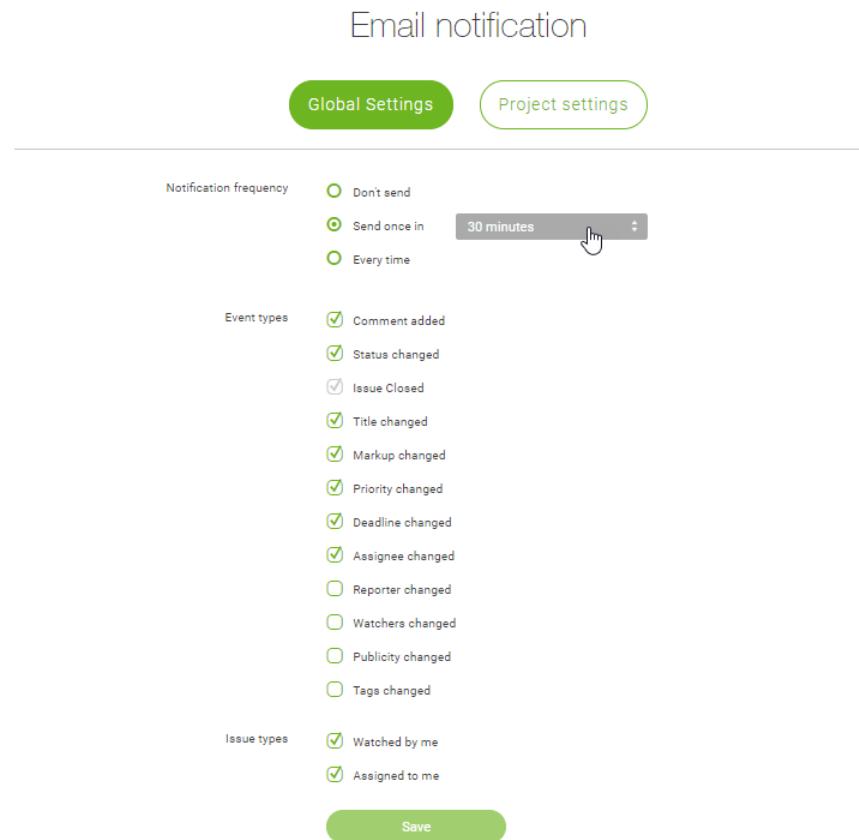
Notifications (messages from Revizto emailed to a user in response to a specific event) can only be edited by users in the Web-GUI.

There two sets of notifications settings:

- Global: applied at the license level and covering all projects, unless otherwise specified. By default, these are applied to every project a user is involved in.
- Project: customized set of notifications for a specific project.

To edit global notifications:

1. Log in at [www.revizto.com](http://www.revizto.com). Navigate to the **Notifications** screen of your web GUI. By default the **Global settings** view is displayed.



2. Define notification frequency. You have three options. The **Don't send** turns all notifications off, the **Send once** in allows setting the frequency, the **Every time** option means that a notification is sent every time a triggering event occurs.
3. Choose event and issue types you want to be notified about (activate the checkboxes).
4. Click the **Save** button to apply your global settings.

#### To customize notifications:

1. Log in at [revizto.com](http://revizto.com) and navigate to the **Notifications** screen of your web GUI.
2. Define your global settings, if needed.
3. Go to the **Project Settings** view. The view displays the list of projects you are involved in. By default, all use global settings. Note that the view has a sorting option and a search box.
4. Find the project to customize its notifications settings.
5. Choose **Custom Settings** in the **Project settings** field. The **Edit settings** button then appears.

Projects	Owner	Project settings
DemoProject_2018	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Custom Settings</b> <b>Edit settings</b>
MK_project	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>
rac_basic_sample_project	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>
test	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>
test2	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>
test3	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>
test=2	Maria Kondorskaya m.kondorskaya@revizto.com	<b>Global Settings</b>

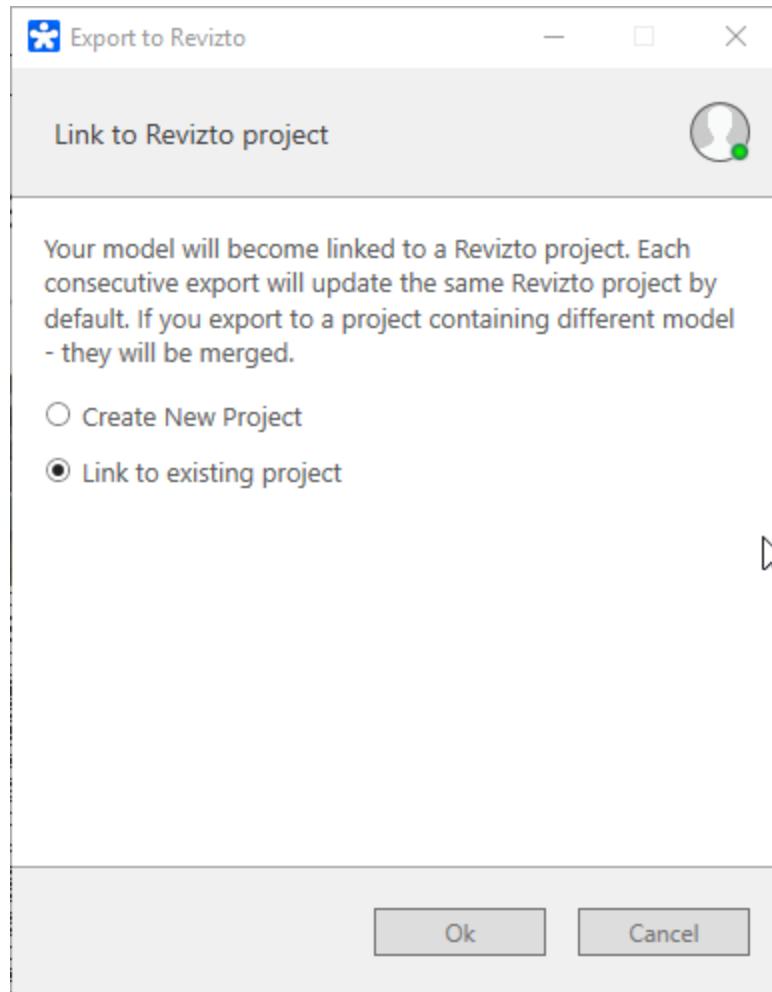
6. Click the **Edit settings** button. It navigates to the notifications editor similar to the one used to define global settings (the project name is displayed at the top of the screen).
7. Make your changes and save them. You can redefine global and project notifications settings any time for your convenience.

## Source Export to Revizto

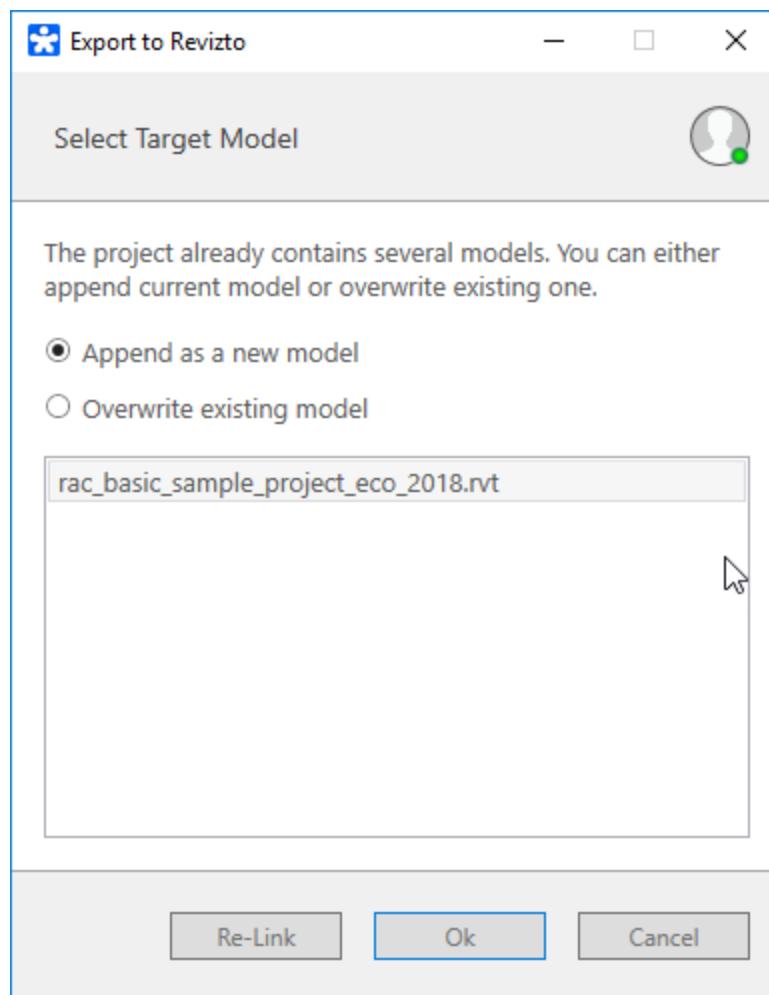
### General Procedure

In general, all supported source files are exported to Revizto according to a standard 4-step procedure implemented via the Revizto plugin. Particularities of specific sources are described below.

1. Open the view you want to use for export in the source program. Note that Revizto export operates under the “you see is what you get” principle, so the final Revizto view will be based on what you choose in the source program.
2. Click the Revizto plug-in menu.
3. Click the **Export to Revizto** button.
4. Choose whether to create a new project or link files to an existing one. Note that you can link one source to multiple projects.



5. For an existing project, choose whether to overwrite existing files or to append new files to them. Files are appended on the basis of shared coordinates. For a new project, enter project name.



6. Define export options (differ for each source program). This is the most important step where accuracy is required. Most part of export errors and problems are caused by misinput at this stage and/or incorrect selection of the exported view (step 1). Most frequent problems and particularities of each source program are covered below.

Export and further Revizto model generation is based on source elements: viewpoints, materials, levels, phases (the exact list depends on the source software).



7. Launch export. When export completes, Revizto starts automatically (unless already running) and displays the result.

Note that, if you created a new project, you will have to define sharing options for it and manually upload it for the first time (if shared).

### Relinking Projects

You can link one source to multiple Revizto projects. To relink your source, click the **Link Settings** button of the Revizto plugin. It initiates the dialog which allows you either to create a new project or to link your file to an existing one (i.e. to change the link).

### Export Scheduling

When you create an export schedule, you can redefine export options again. Note that the scheduling option is unavailable to users with view and collaborate level access.

Project export schedule can be defined/modified at two points:

- From Revizto plugin
- From Revizto Export Scheduler Application

Note that project export scheduling options and statistics become available in the application only after you initially define them in Revizto or via the relevant plugin.

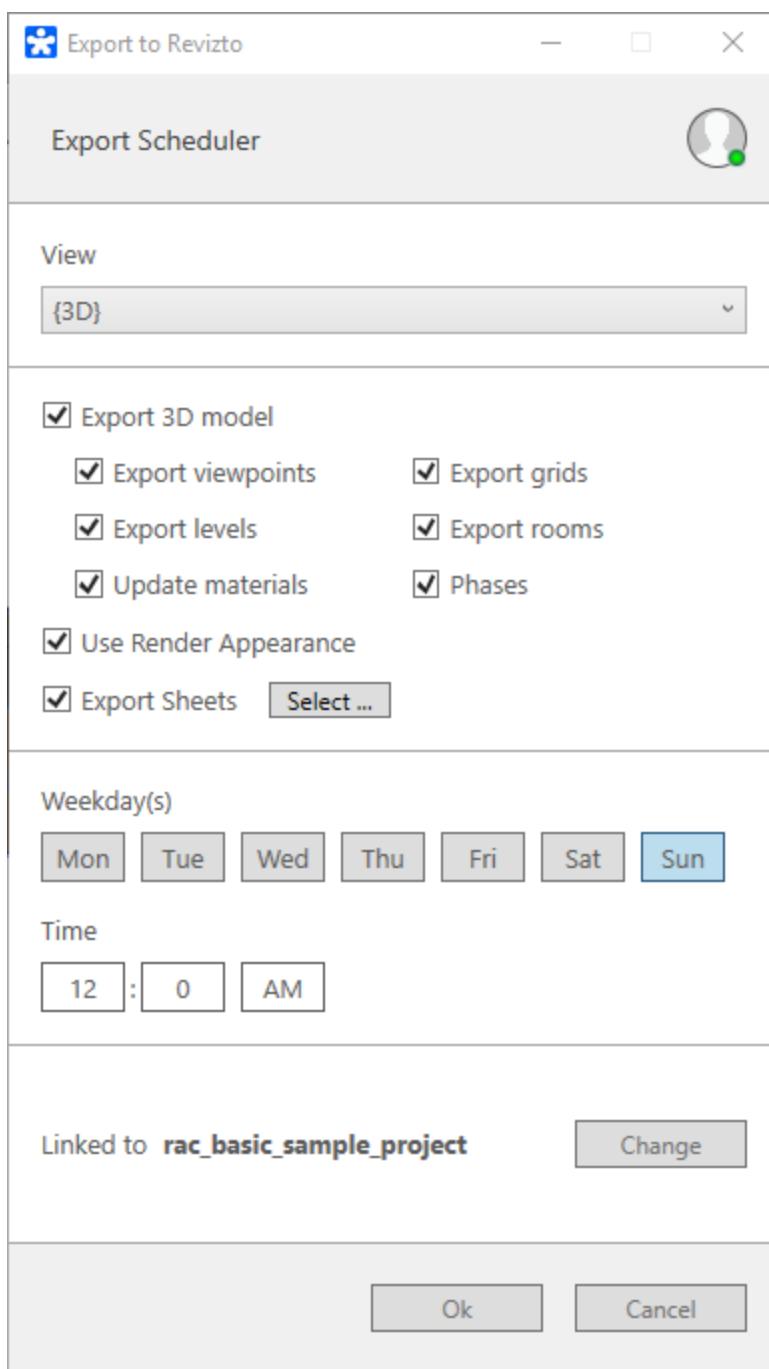
## Using Revizto Plugin

### To create an export schedule:

1. Open the plugin in the relevant source program.
2. Click the **Export Scheduler** button. The schedule builder loads in a popup.
3. Redefine export options and relink the source, if needed.
4. Create the export schedule. You can choose several days of the week and define time (the same for all days).
5. Note that if the project has been earlier shared and uploaded to the cloud, the Upload to the cloud checkbox appears in the form. Activate it to synchronize your project at each export.

Note that if synchronization settings are also defined in Revizto, they are updated according to the latest modification (the reverse will be true).

6. Click **OK** to save your settings. The new schedule is applied to the project and becomes available in the Export Scheduler Application that contains information on all export schedules within a team.



### Export Scheduler Application

The Export Scheduler Application displays all active export schedules. It can only be used when at least one schedule is created from a Revizto plug-in. Existing schedules are listed in the application with the source file and target Revizto project names indicated.

You can use the Export Scheduler to:

- run an export immediately for the selected schedule (click **Run**)
- unschedule an export for the selected schedule (click **Unschedule**)

- skip the nearest export for the selected schedule (click **Skip**)
- change schedule for the selected schedule (use the **Scheduler** area)
- redefine export settings for the selected schedule (click **Settings** to access the source file and relevant Revizto plug-in)



Note that even if two sources are scheduled to be exported at the same time, they are not exported simultaneously, but in turns.



When export time comes, the application launches and displays the progress and statuses.



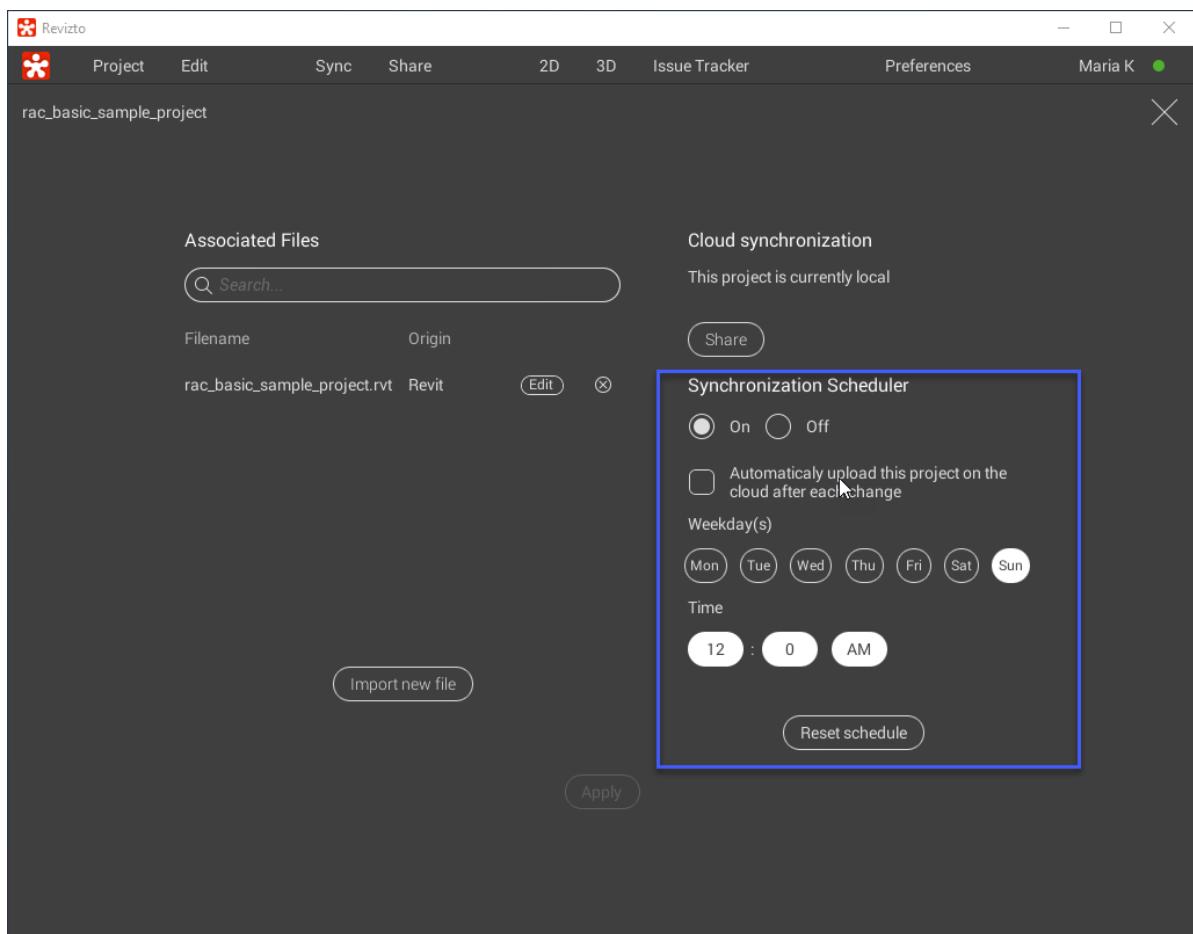
## Cloud Synchronization

Once export settings are defined, you can also define schedule for synchronizing Revizto project with the Cloud (or with the shared location).

### To set up the synchronization schedule:

1. Make sure that the project has been exported at least once and is available in Revizto.
2. Open the project and navigate to **Edit > Scenes and Scheduler**.
3. Fill-in synchronization preferences in the right part of the window. You can choose several days and define export time (one for all days). It is logical to have your synchronization schedule correspond to the export one.
4. Click **Reset schedule** to save your settings and the **Apply** button.

Note that when your project has already been shared the **Automatically upload this project on the cloud after each change** checkbox becomes available. Activate it to use this option.



Synchronization can also be scheduled from Revizto plug-in; if both scheduling options are used, the latest configuration is applied.

## 6.1 Revit

### Before Exporting

Before exporting source files from Revit, it is recommended to create a target 3D view with settings that suite export needs. In particular, it is recommended to:

- Set **Detail Level** to **Fine**. Note that Revizto excludes 2D items from export and at low detail level Revit displays small items (e.g. tubes) as 2D lines.
- Make sure that Renderings and Views have different names in Revit. Otherwise, some views will not be exported.
- Set the Phase Filter to the option that creates a view you want to have in Revizto as default. Note that if phases are exported correctly, you will be able to switch them in Revizto as well, but your default view will be based on the one open in Revit at the point of export.

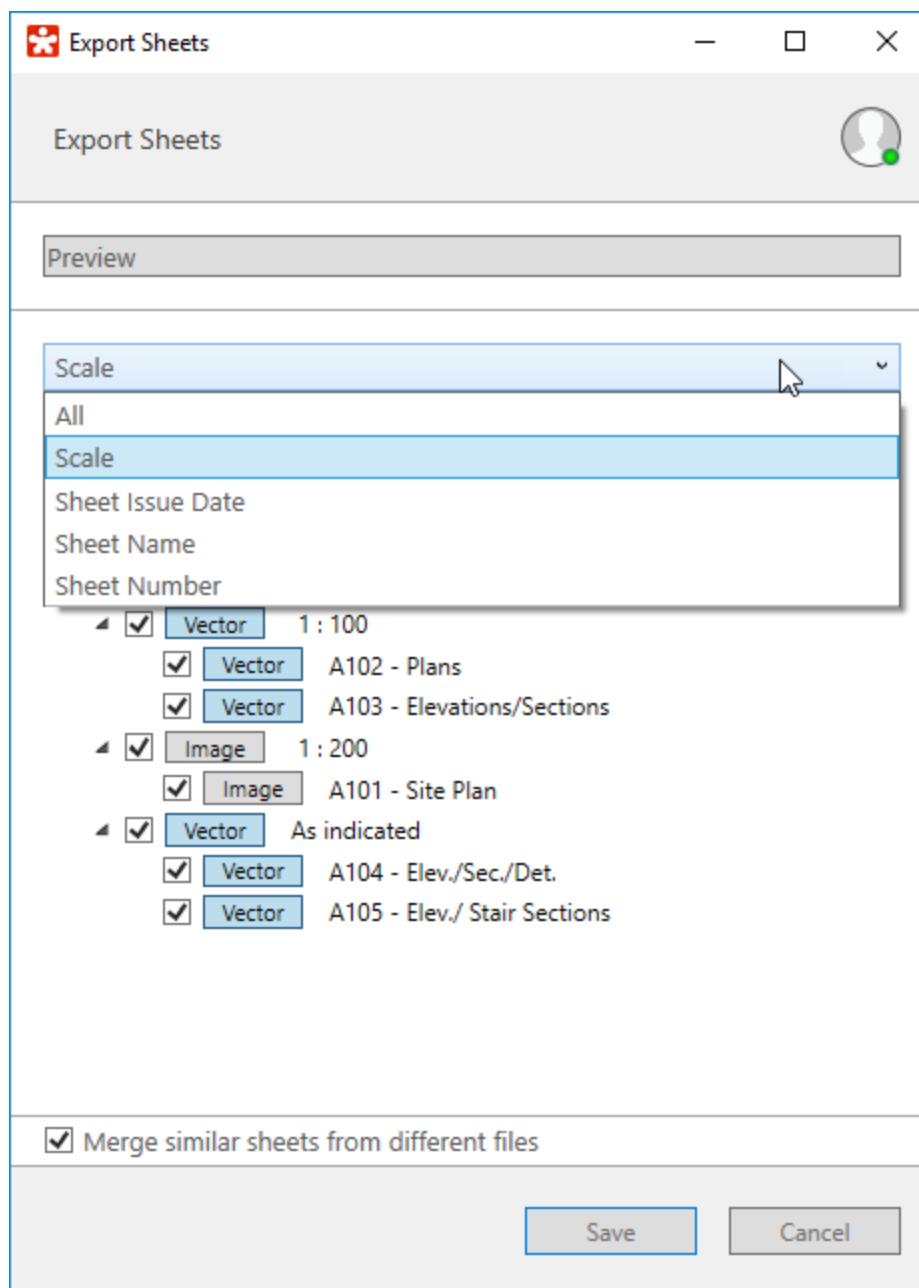
### Export options. Detailed

Option	Description
<b>Export 3D model</b>	<p>Activate this checkbox to export the 3D model. Note that if this checkbox is deactivated all options related to 3D view become unavailable.</p> <p>Before launching export make sure that your source file is open in the 3D mode (3D view is selected in Revit).</p>
<b>Export viewpoints</b>	<p>Activate the checkbox to export all original Revit views. Otherwise only the currently selected view (3D) will be exported and available in Revizto.</p>
<b>Export levels</b>	<p>Activate the checkbox to export Revit levels defined in 2D. All elements outside levels are assigned to the <b>No Level</b> Revizto level. It is also used when levels are not defined/exported at all.</p>
<b>Update materials</b>	<p>This checkbox is important when export is carried out repeatedly. Revizto has its own lighting and material editor that allows changing textures, colors of objects, lighting.</p> <p>If you are sure that it is necessary to overwrite changes made in Revizto every time source is exported, activate this checkbox. Otherwise, deactivate it.</p>
<b>Use render appearance</b>	<p>Activate the checkbox, if you want your Revizto model to have a more movie-like appearance with less attention to actual materials. If correct display of materials is important, deactivate the checkbox.</p> <p>This option does not affect any lighting/material changes in Revizto editor.</p>
<b>Export grids</b>	<p>Activate the checkbox to export Revit grids. Grids are created in Revit manually and can be very useful for collaborators.</p>
<b>Export rooms</b>	<p>Activate the checkbox to export Revit rooms and use them to navigate within the resulting Revizto model.</p>
<b>Export phases</b>	<p>Revit files store data on development stages called phases and users can switch from phase to phase and review changes. If you activate this checkbox, phases will be also available in Revizto.</p> <p><b>Caution:</b> If your Revit file is open in the phase mode and the flag is deactivated, only the open phase will be exported, which is not likely to be the desired option.</p> <p><b>Note:</b> Phase export may affect performance of the Revizto lighting editor due to the large amount of layers coexisting in a scene.</p>
<b>Export sheets</b>	<p>Activate the checkbox to add sheets to Revizto model. Then click <b>Select</b> to choose which sheets have to be exported.</p> <p>Choose export option for each sheet: <b>Image</b> or <b>Vector</b>. The <b>Image</b> option means that the exported sheet will only have 3 zoom levels, each represented by an image. The <b>Vector</b> option has a smooth, more powerful zooming, yet, it may be unavailable for some files and requires more system resource.</p> <p>For more details on sheet export, see below.</p>

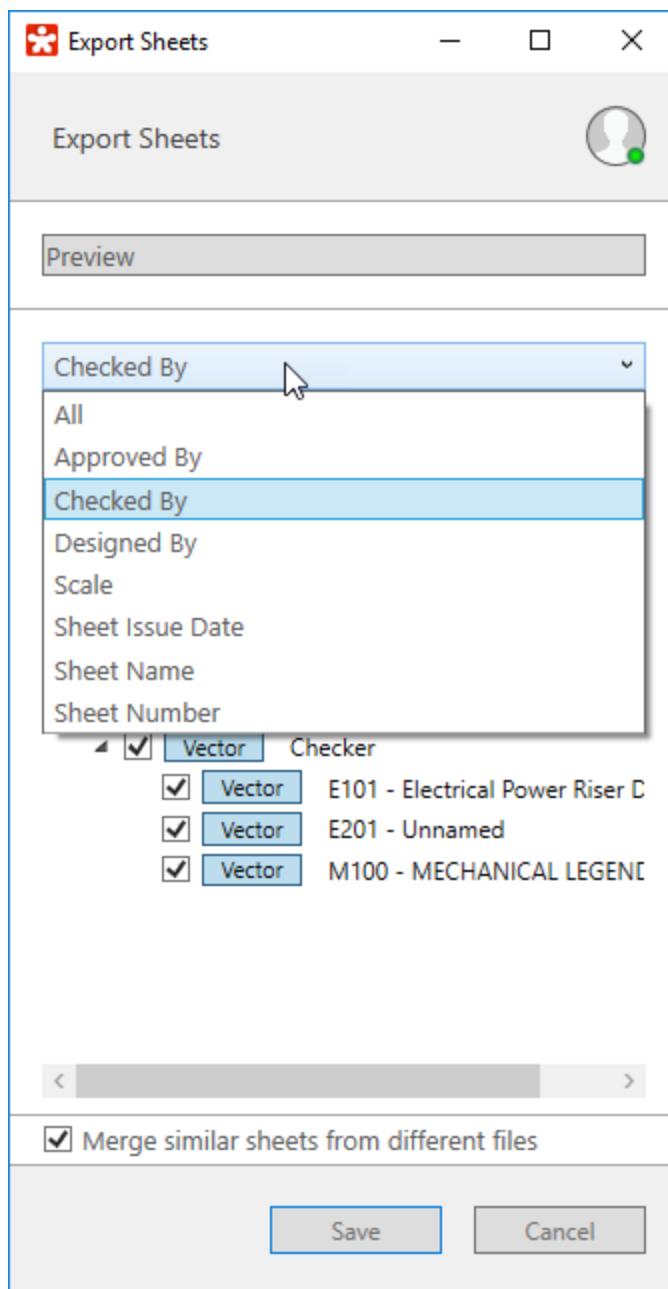
Option	Description
	<b>Tip:</b> use filters to manage the list of sheets. Note that sheets can have similar names (not IDs though).

## Sheet Export Particularities

As mentioned above, you can export sheets in vector or image format. You can also use a range of filters to quicker find sheets that you want to export.



Note that the list of available filters is not strictly defined and depends on properties available in the source file.



## 6.2 Navisworks

Navisworks is not designed for creating models, it combines various sources together and detects clashes. One of its key sources is Revit. So, when you want to add a Navisworks source to your Revizto project, you may separately add the Revit model and exclude it from Navisworks exports (i.e. export it without geometry and sheets). In general, this is the recommended option, though it may be unavailable due to project particularities.

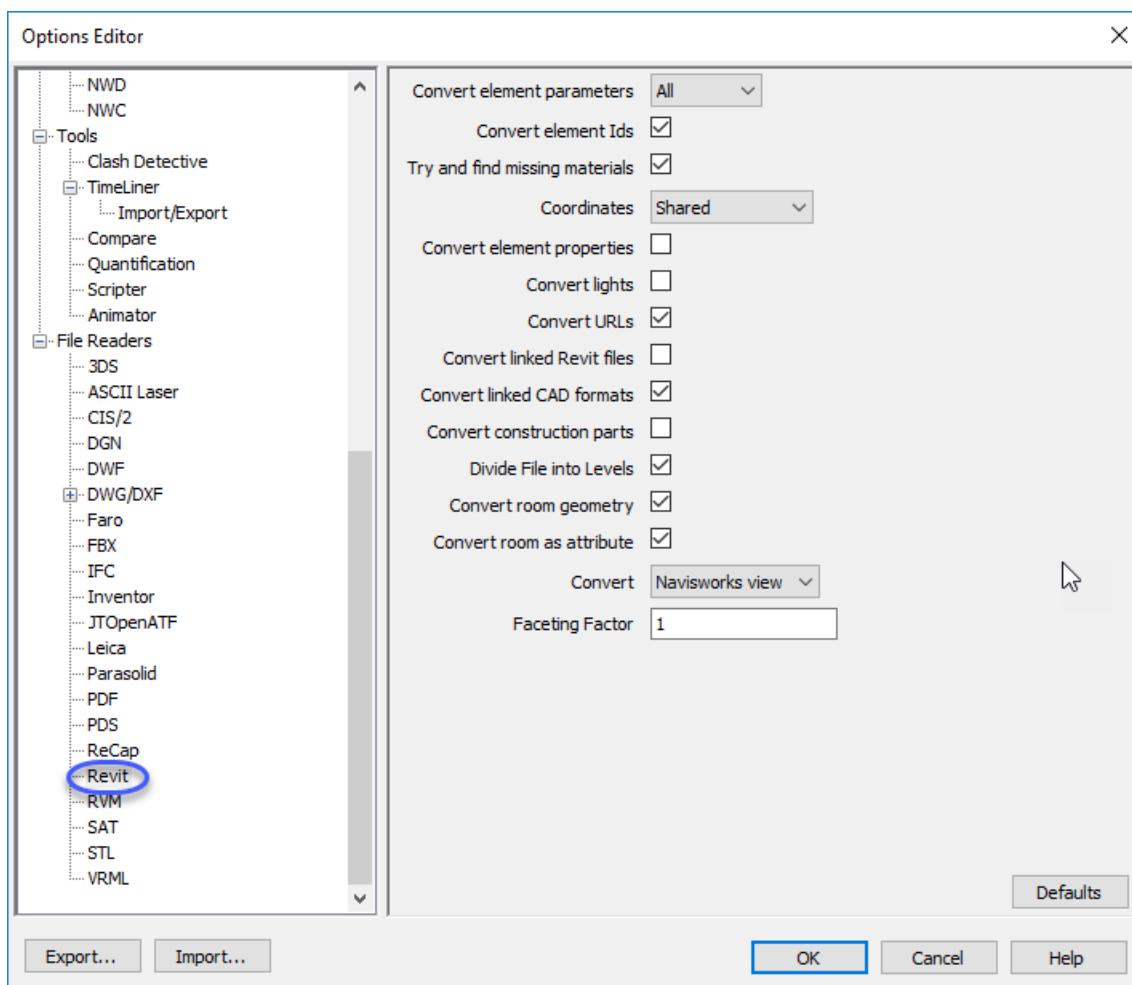
If you want to export all data from Navisworks, it is crucial to make sure that initial export from Revit to Navisworks is performed correctly. Revit uses an addin for export to Navisworks, in Navisworks there is built-in function (go to the **N** menu > click the **Options** button > expand the **File Readers** item in the left panel > choose **Revit**, see the image below). All in all, export/import settings are quite similar.

Make sure to:

- export the entire project, not the first 3D view (if exported from Revit),
- convert construction parts, elements, element ID's (both export/import)
- Use the **Shared Coordinates** option (both export/import). Note that when Navisworks and Revit sources are combined within the same Revizto model, the resulting view may appear to be corrupted due to coordinates mismatch. Before exporting Navisworks source data, make sure that it uses the same set and type of coordinates as the Revit file.
- Do not use the **Convert linked Revit files** option. Revit projects can have numerous embedded files and including them into your export can cause software failure or very long delay.

Pay attention to the **Faceting Factor**. It is responsible for the way circular shapes are rendered. It is not recommended to use high values for large working projects. Although a higher factor means better view, it also results in higher system load and slower operation. Yet, you may use higher factors when creating small Revizto models designed for presentation purposes.

Also, when Revit project is initially exported to Navisworks, and then exported to Revizto via Navisworks, you have to make sure that all data from Revit has been duly exported and added in Navisworks.



**Tip:** For additional options for compressing projects, see the [Project Optimization](#)<sup>84</sup> section below.

## Grouping and Exporting Clashes

Navisworks clashes are exported to Revizto as issues. Note that exporting separate clashes is not recommended. You have to make sure that clashes are conveniently and logically grouped within the source file.

To group clashes in Navisworks, you can either use its own functionality or the relevant feature of the Revizto plug-in. Also, third-party grouping tools are available in the market.

### If Navisworks grouping is used:

1. Create your own tests for clash detection. Note that you may want to define rules. Run your test in Navisworks to detect clashes matching your rules. It is not unlikely that you get several thousands of clashes. If not grouped, each is exported to Revizto as a separate issue which is not convenient. Therefore, grouping is recommended before exporting.
2. In Navisworks you can select clashes, right-click and add them to a new group. Then each exported clash group will represent an issue in Revizto.

Test 1

Last Run: Thursday, October 12, 2017 7:03:28 AM  
Clashes - Total: 15021 (Open: 15021 Closed: 0)

	Name	Status	Clashes	New	Active	Reviewed	Approved	Resolved	
	Test 1	Done	15021	15021	0	0	0	0	
	Test 1 (central)	New	0	0	0	0	0	0	

Add Test Reset All Compact All Delete All Update All

Rules Select Results Report Collapse to hide test list.

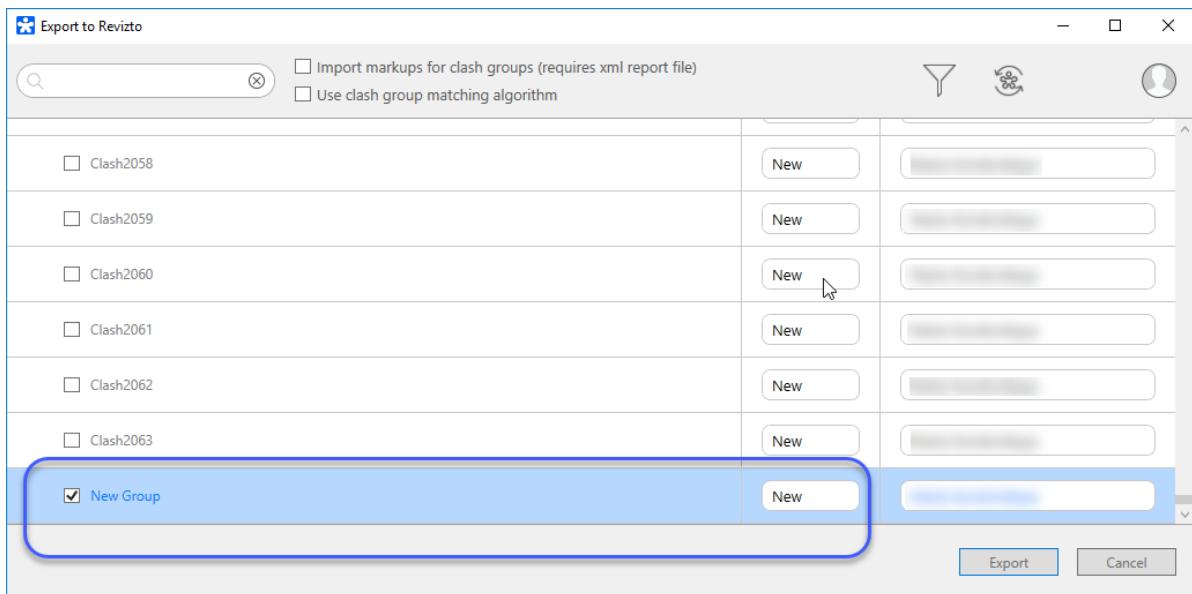
New Group Assign Re-run Test

None

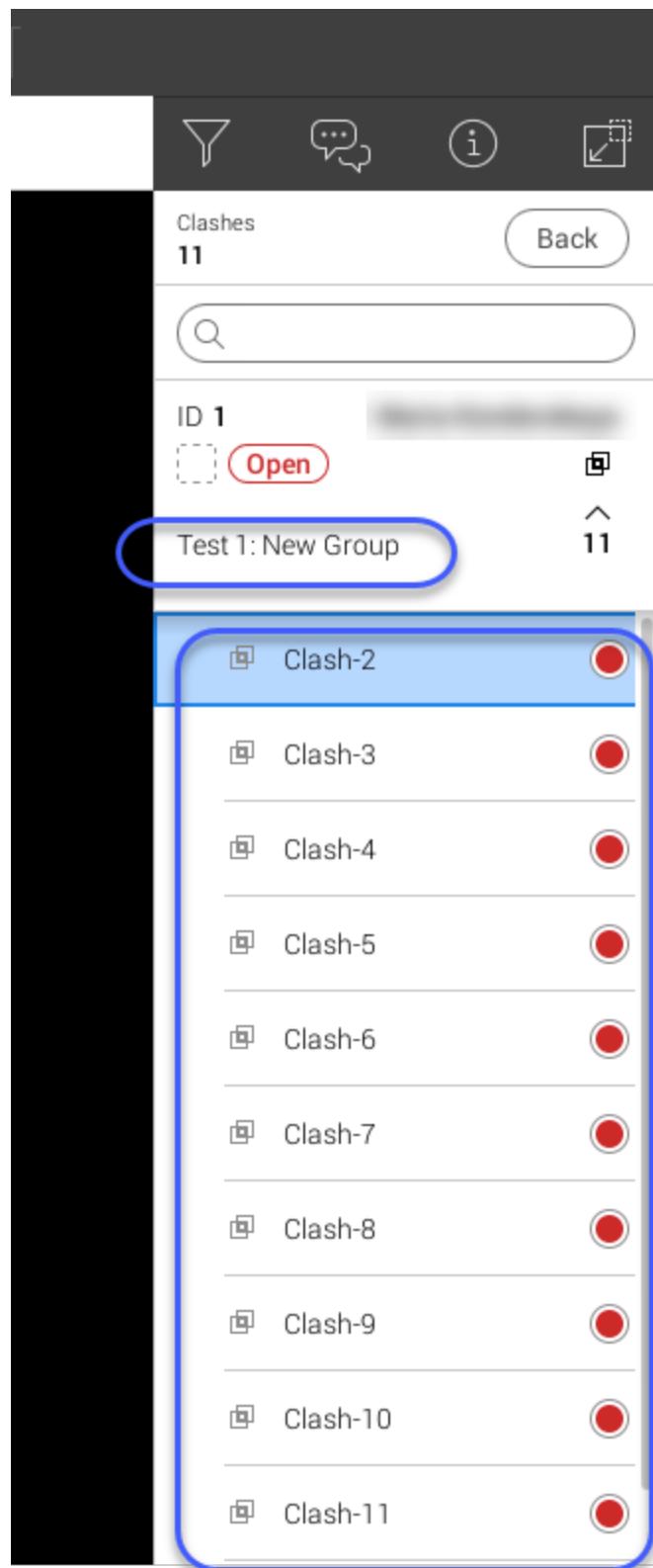
Name	Approved...	Approved	Description	Assigned To	Distance
[Results101...]					0.000 m
[Results1-100 6 12-10-2017]					-2.392 m
Clash1 6 12-10-2017					-2.392 m
Clash2 6 12-10-2017					-1.820 m
Clash3 6 12-10-2017					-1.792 m
Clash4 6 12-10-2017					-1.657 m
Clash5 6 12-10-2017					-1.542 m
Clash6 6 12-10-2017					-1.434 m
Clash7 6 12-10-2017					-1.433 m
Clash8 6 12-10-2017					-1.414 m
Clash9 6 12-10-2017					-1.411 m

Items

3. After grouping clashes, go to Revizto plug-in and click **Sync Clashes**. Note that you have to save your Navisworks file before. At this point you can also link clashes to a new project. Revizto plug-in processes clashes and builds and export list.
4. Activate checkboxes by the names of clashes/groups you want to include in your export. Click the **Export** button.



In case of successful export, the exported group is displayed as a single [issue](#) <sup>175</sup> in Revizto with the **Open** status. This issue can be expanded to review and manage separate clashes within it.

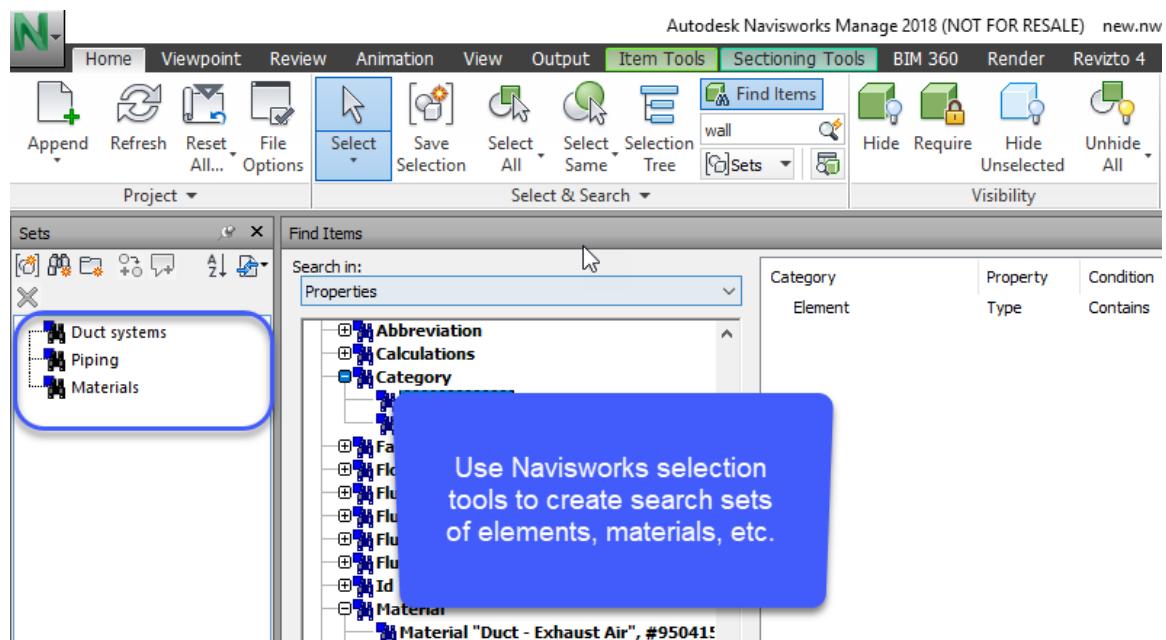


Revizto plug-in offers its own functionality (Intersect Search Sets) for building clash tests and grouping clashes for export. Note that this feature only builds clash tests for search sets. So,

before using it, you have to create custom search sets, each including objects you have to intersect (i.e. clash).

#### If Revizto grouping tool is used:

1. Make sure to create your own search sets in Navisworks. For example, they may include ducts and pipes, or walls and pipes, etc.



2. Then launch the Revizto plug-in and click ***Intersect Search Sets***. Your sets will appear in a separate window.
3. Define the test, i.e. select a set or sets on the left and on the right to intersect them and detect clashes, if any. Click OK to save your settings as a clash test. Your test will be available in the ***Clash Detective*** window of Navisworks.
4. Run your test/s. Then export results. Note that with Revizto intersection option used each test is exported as an issue (i.e. a group of clashes).

topic under construction

## 6.3 AutoCad/ArchiCad

Under construction

## 6.4 Rhinoceros for Windows

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## 6.5 SketchUp

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# Project Management

Revizto-based project collaboration involves using the web workspace web-GUI (license manager), Revizto Viewer software and Revizto plugins integrated into source software.

Project collaboration is an iterative process that includes:

- Project creation
- Export of source files to create viewer scene (a new project can be created at this stage as well)
- Issue creation and management (collaboration)

Note that the flexible system of user access level allows limiting high-level functions like file export and export scheduling, to specific employees. Issue handling is available to editors of source files who get issue status updates via plugins (again the level of access to the issue workflow is editable).

## 7.1 Creating a Project

There are two points where a new collaboration project can be created:

- Revizto Application
- Revizto plug-in in a source program

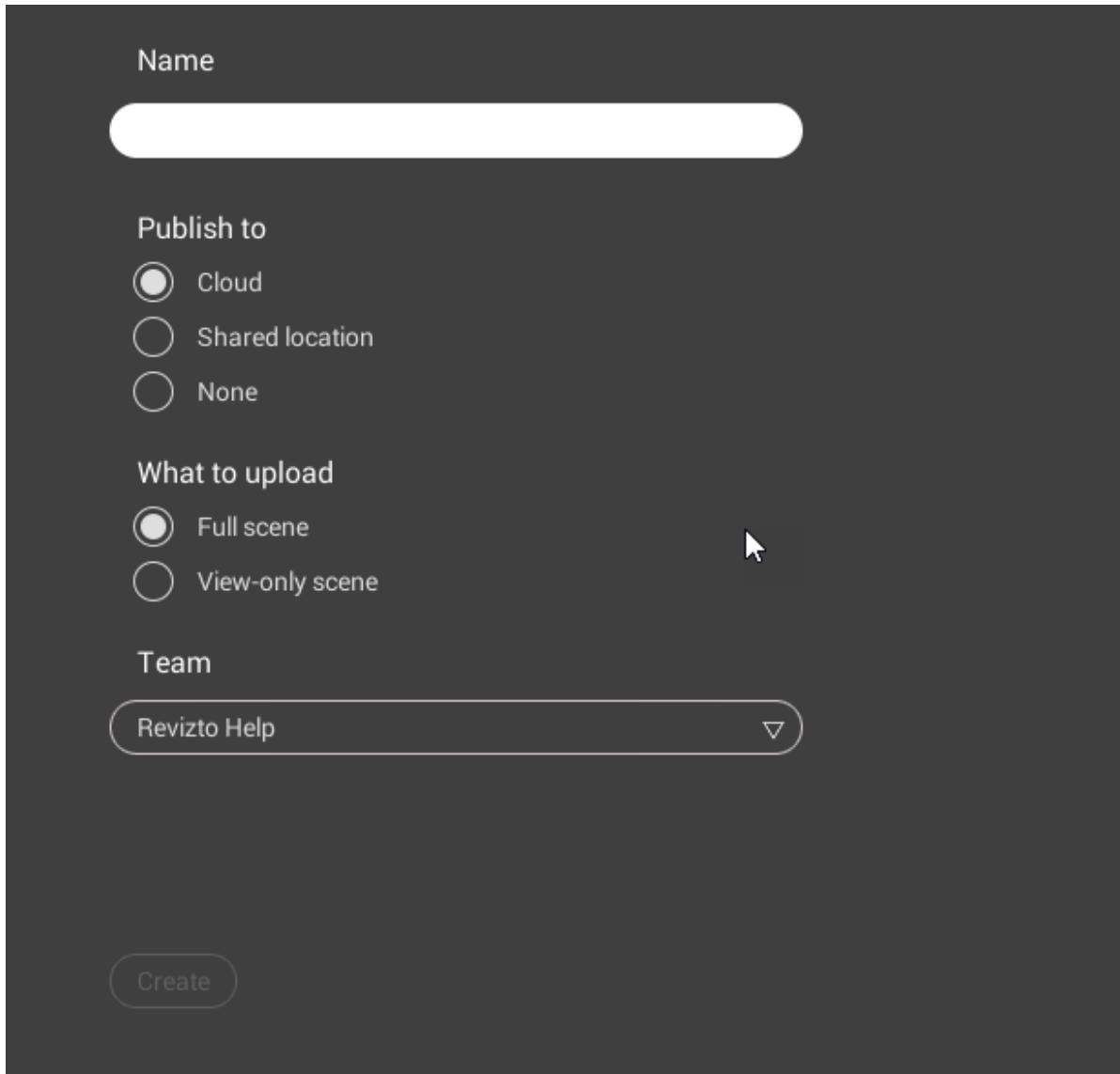
The preferred option depends on the business process. Note that to create new projects, you need at least Content Creator license role because each new project requires a license.

**To create a new project in Revizto:**

1. Go to **Project > New** in the main menu.
2. Fill in the form that opens.
  - a. Enter the project name.
  - b. Choose where the project will be published. Cloud is the preferred and recommended option. Revizto offers highly available clouds powered by Amazon servers. If cloud storage is selected, all project data (models and issues) are exported to it. Shared location implies that models are stored locally (e.g. on a server available to all team members) while user data, issues and related data is uploaded to the Cloud. None means that Revizto will only be used locally (i.e. not synchronized/published). Note that, while the option is available as some customers request it for security reasons, it is not recommend it and prevents the customer from using Revizto to its full potential.

Also, even if you prefer not to share data, you will still need to connect the web once in while to register and manage the license, edit access rights, etc.

- c. Choose whether to fully upload models (with all the background data and properties exported from the source program) or to upload view-only scenes (presentation option).
- d. Choose team. By default the current license name is selected. You can choose another team if you have several active licenses or collaborate as a guest within several teams.



3. Click the **Create** button.

At this point the project is considered created and information about it appears in the Web-GUI. A project license is used. Although you are automatically redirected to the team building view, you can stop now and get back to team creation later. Same is true about model upload. You can create an empty project and later upload content to it.

**To create a new project from Revizto plug-in:**

1. Launch the [export process](#)<sup>54</sup> in any source program and choose the **Create New Project** option. For more details on export, see the relevant [section of this Guide](#)<sup>54</sup>.

Note that when a new project is created via a plug-in export and model creation are carried out immediately. Yet, the project remains local and not added to the license until you edit its properties.

2. Open Revizto and find your project in the project list (to find it quicker, limit your search to local projects).
3. Double-click on the project tile to open it. Click the **Sync** button at the top menu.
4. Define your sharing, publication and licensing settings in the form the opens (similar to the project creation screen described above).
5. Click the **Upload** button. Once uploaded, your project will be duly created with a license used.

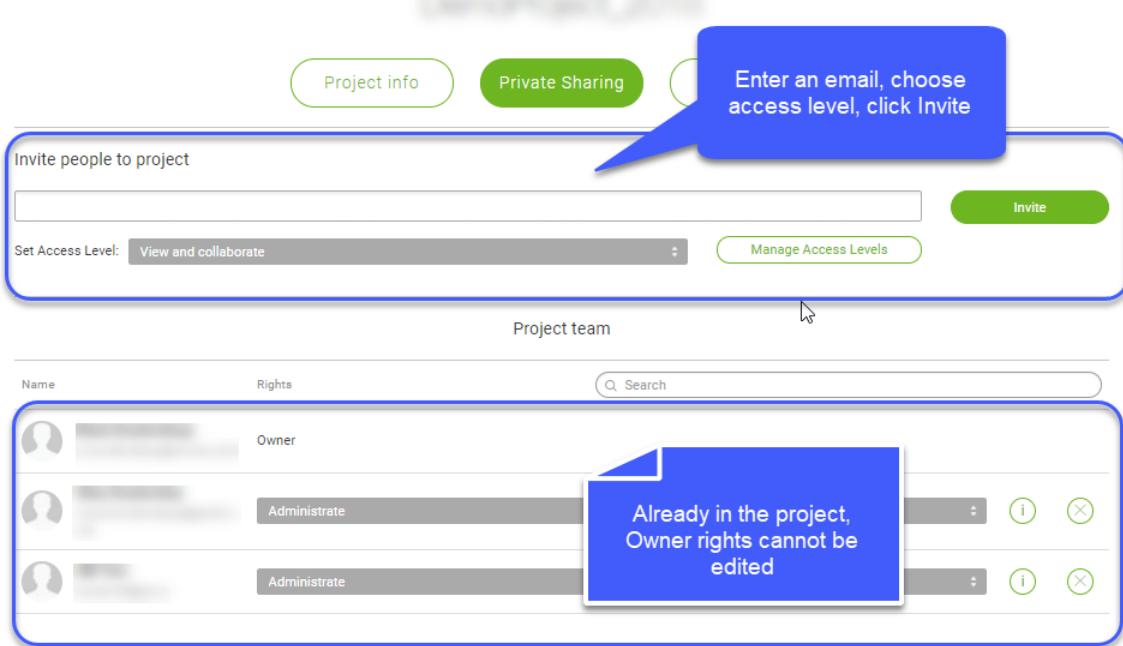
You can proceed to team creation and collaboration.

## 7.2 Creating and Managing Project Team

**To invite a user to a project from the Web GUI:**

1. Log in to your workspace.
2. Navigate to the **Private Sharing** view (**Manage Projects** > choose a project).
3. Enter a valid email address of a person you want to invite. Choose an access level in the **Set Access Level** field.
4. Click the **Invite** button.

The user will then receive an invitation email from Revizto and will be able to download Revizto and join the project.



To invite a user from Revizto application:

- 1.

**UNDER CONSTRUCTION**

## 7.3 Managing Project Access Rights

By default, there are three access levels available in Revizto projects:

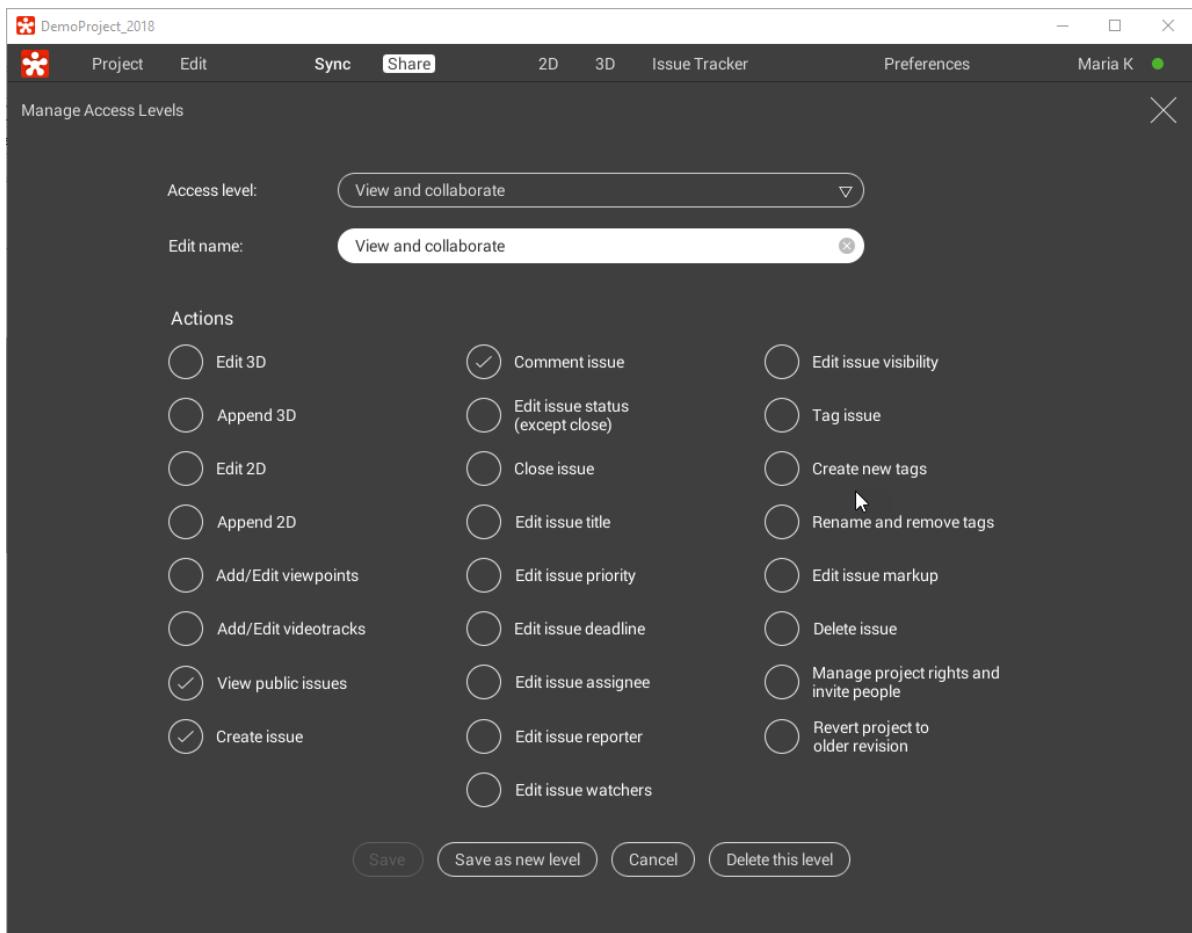
- Administrate
- Edit content and collaborate
- View and collaborate

Project owners can edit/create project access levels. Note that changes they make are only applied at the project level (unlike changes made by the [License Owner](#)<sup>□3</sup> (the SuperAdmin) or by a license level Administrator in the Web GUI).

Any time you invite a new user to your project, you have to assign rights to them. Note that if an invitation is issued to a person who has no team-level license, a collaborator/guest license is issued to them simultaneously.

To edit/create a new access level in Revizto application:

1. Open a project.
2. Go to the **Share** screen.
3. Click the **Manage Access** button.
4. Repeat steps 3-4 of the procedure provided for the Web GUI [access rights editor](#)<sup>□38</sup> (the interface form is similar to that in the Web GUI). Note that you have to be the project owner, or license level Administrator/SuperAdmin to edit project access rights.



Note that even a project administrator cannot edit their own access rights.

## 7.4 Issue Management (Collaboration)

### Issue LifeCycle

1. Issue is created:
  - a. created in Revizto (or Revizto plugin in the source software) and assigned to a team member. Issue status is ***Open***.
  - b. Imported as a clash from Navisworks
2. The assignee receives an email notification (if configured). The issue automatically becomes available to the assignee in Revizto.
3. Optionally, relevant team members can be assigned as issue watchers. Issue becomes available to them for feedback and comments.
4. The assignee changes issue status to In progress and starts working on it. If needed, an open issue can be reassigned to another team member.
5. When the issue is considered resolved its status is changed to ***Resolved***.

6. The issue creator reviews the issue and closes it or changes its status back to **In Progress**.  
Note that a closed issue can be reopened.

## Reporting an Issue and Defining its Settings

### From Revisto/Viewer

For more details on Revizto navigation options, available objects, view modes and tools, refer to the [Model Elements and Controls](#)<sup>□<sub>80</sub></sup> section and to the [Using 3D controls to create an Issue Example](#)<sup>□<sub>81</sub></sup> section.

### From a Plug-in

There is no issue reporting functionality in Revizto plug-ins. To report an issue, open the required source file and click the **New Issue** button in Revizto plug-in. It launches the relevant Revizto model in the application and allows creating an issue from there.

### Issue Settings

Public/hidden

Etc.

### Clash Management

## Reviewing an Issue and Commenting on it

### In Revisto/Viewers

#### Via Plugin

There is no issue tracking functionality in Revizto plug-ins. To access a current issue and take part in collaboration, open the required source file and click the **Track issue** plug-in button. It launches the relevant Revizto model in the application and shows issues available to the current user.

**Tip:** When you view issues in Revizto, keep the source software (Revit, Navisworks, etc.) open with the **Issue Tracker** plugin button pressed. Then, by selecting an issue in Revizto you will be able to see the relevant part of the structure both in Revizto model and in the source software. Note that you can have only one instance of source software simultaneously linked to Revizto.

TOPIC UNDER CONSTRUCTION

## 7.5 Collaborator Reports

Each user can create issue reports for projects they are invited to. Reports are created in the **Dashboard** view of the web GUI ([My Projects > Project page](#)). This view allows building customized issue reports at the project level, scheduling generation and distribution time for each.

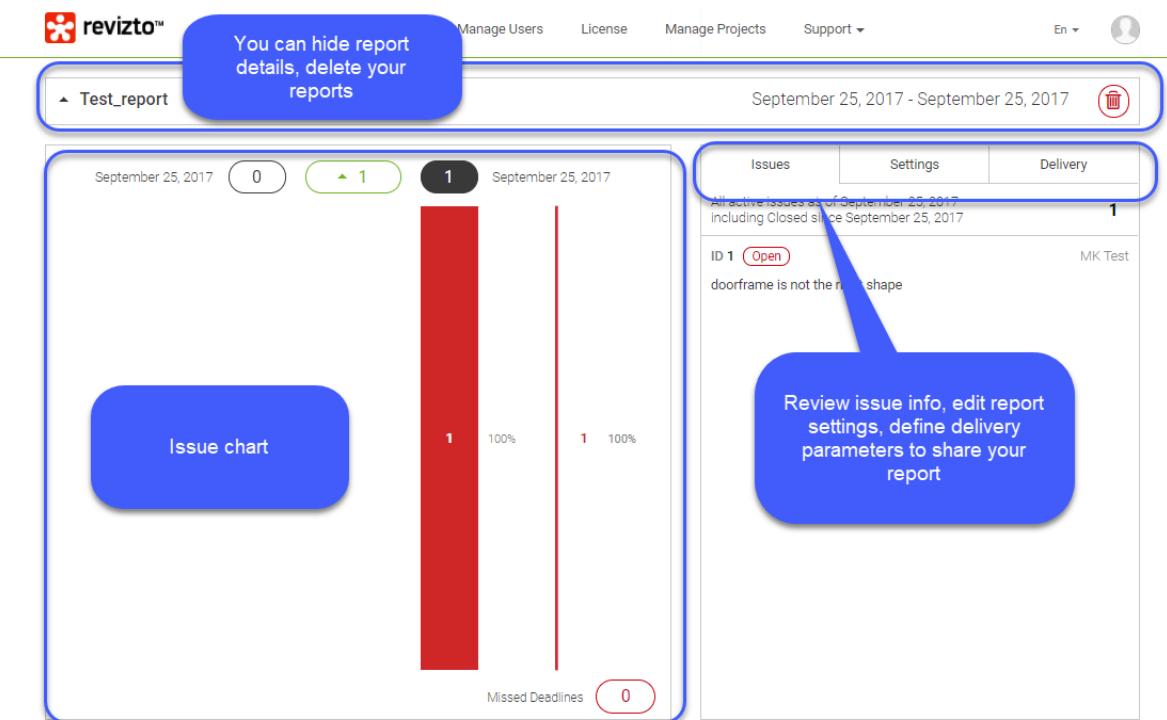
To create a new report:

1. Click the **Create New Report** button.
2. Define the report settings. Make sure to correctly define reporters, assignees, tags, etc.

The screenshot shows a vertical list of report configuration fields:

- Name:** A text input field containing "New".
- Time Period:** A dropdown menu set to "Previous Week".
- Tag:** A section with two radio buttons: "All" (selected) and "Any".
- Assignee:** A dropdown menu.
- Reporter:** A dropdown menu.
- Save:** A large green button at the bottom.

3. Save your settings. The system immediately generates the report and displays it on the view.



4. If you want to email your report to another person, go to the **Delivery** tab of the report view. You can either launch a one-time immediate delivery or schedule regular mailings. Note that you can send reports to people outside the project and workspace. You can also define delivery format. Note that all fields are mandatory.

Issues	Settings	Delivery
<p>▲ Recipients</p> <input type="text"/>		
<p>▲ Delivery time</p> <p>Weekday(s)</p> <input type="text"/> 		
<p>Time </p> <p>1   pm  </p>		
<p>▲ Format</p> <p><input type="checkbox"/> Chart <input checked="" type="checkbox"/> Excel <input type="checkbox"/> PDF</p>		
<p> Save  Cancel</p>		

## 7.6 Versioning

Topic under construction

## Revizto Application

Revizto is a collaboration tool that ensures interaction between several software applications. Revizto Application is only one of them, therefore this guide mainly focuses on the process, not on describing specific GUI functions. Yet, there are some functions reserved to Revizto Application and/or designed exclusively for it. These are covered below.

## 8.1 Model Elements and Controls

Revizto allows you browsing the model by objects exported from source files (e.g. by levels, phases, viewpoints). You can also create your own viewpoints, add color coding and define transparency settings.

A wide range of controls in Revizto is designed to select and highlight objects in a way that is tailored to particularities of a source program in order to make sure that an issue is clear. For example, Revit offers orthogonal and perspective camera options. As most users prefer the former, issues detected inside Revizto model can be unclear when loaded in Revit. But, when specific controls are applied to highlight them, Revit users can get a clear view of each issue.

Topic under construction

### 8.1.1 Viewpoints

Initial viewpoints are exported from source files (mainly, from Revit). You can use them to navigate in the model. Also, you can create new viewpoints for better and faster navigation or to highlight an issue location.

You can select any viewpoint is the **Home Viewpoint**. (i.e. the one displayed when you click  icon at the bottom of the screen.

Sample use of viewpoint

As mentioned above, you can create a viewpoint anywhere in the model. You can also create a viewpoint that uses custom color coding and sectioning settings. Then you can create an issue in it and assign it to the author of the source file. They will see your viewpoint in Revizto while the source program will also automatically display the issue using your viewpoint settings.

### 8.1.2 Rooms

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### 8.1.3 Levels

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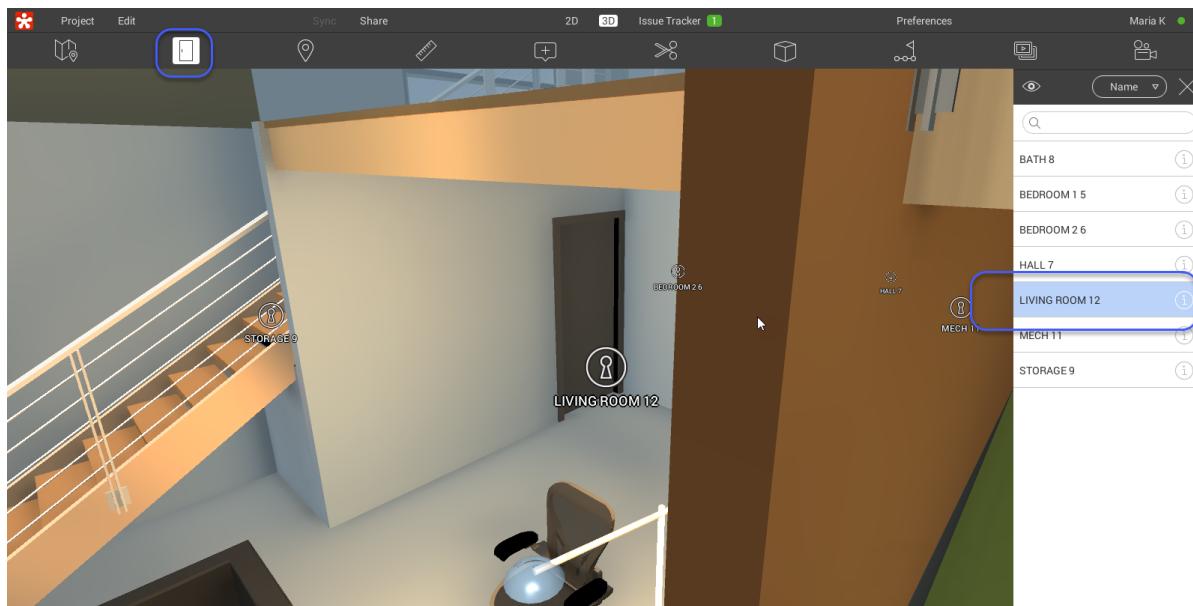
### 8.1.4 Phases

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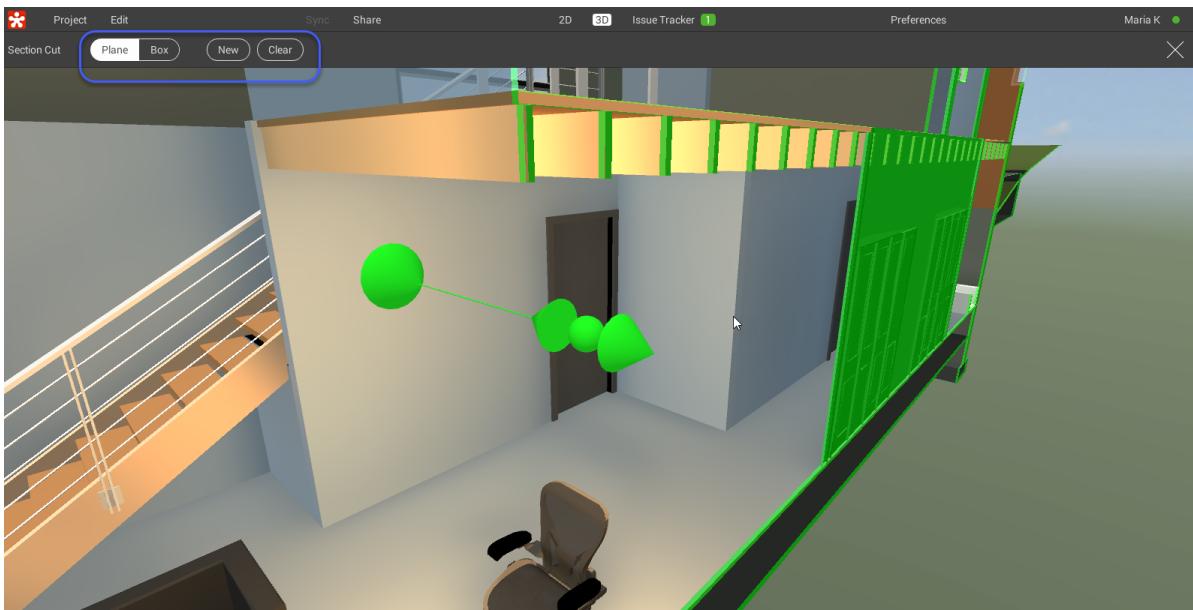
### 8.1.5 Using 3D controls to create an Issue. Example

To create an issue in 3D:

1. Launch your model and go to the **3D** view (top menu option).
2. Choose a viewpoint, room or object that you want to work with. For example, let us navigate to a room (living room).



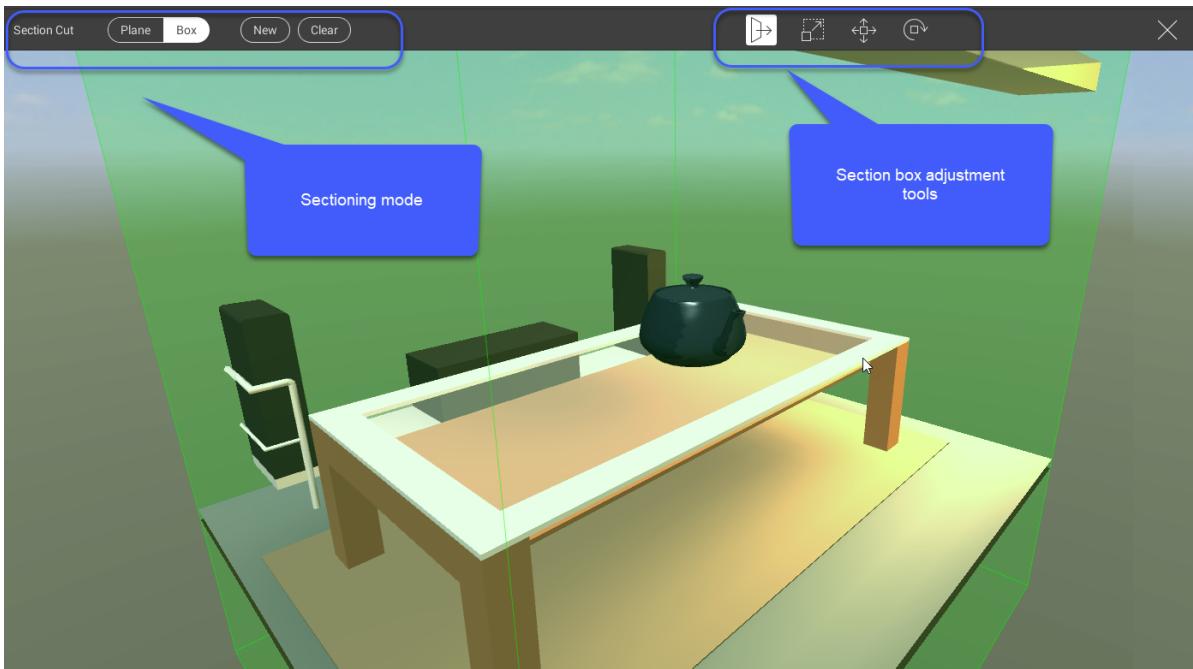
3. Then let us create a section ( icon) here. For example, let us cut the side wall of the room using the **Plane** mode of the section tool.



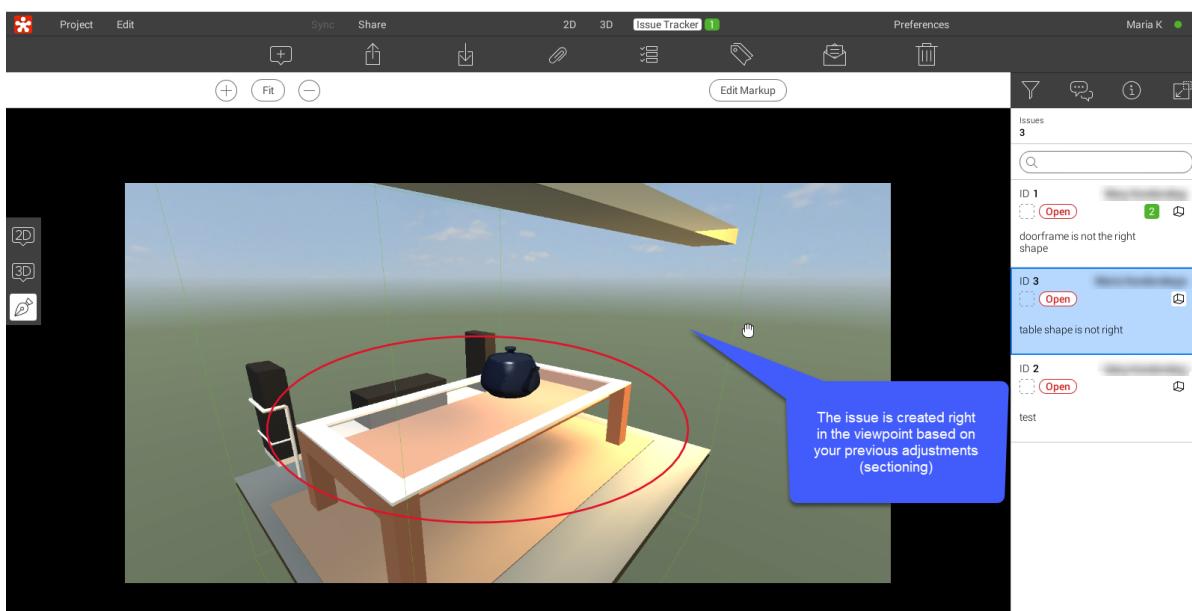
4. Then let us save the section as a view point (the viewpoint icon at the bottom of the screen).



5. Navigate to the new view point ( at the top toolbar).
6. Let us then try to create another section, using the **Box** mode this time. Let us cut out the table and save another viewpoint (your previous viewpoint are all still available as well).



7. Navigate to the newest viewpoint. Let's create an issue about the table here ().



8. Assign the issue to a source author and other collaborators.
9. Synchronize the model with the cloud.

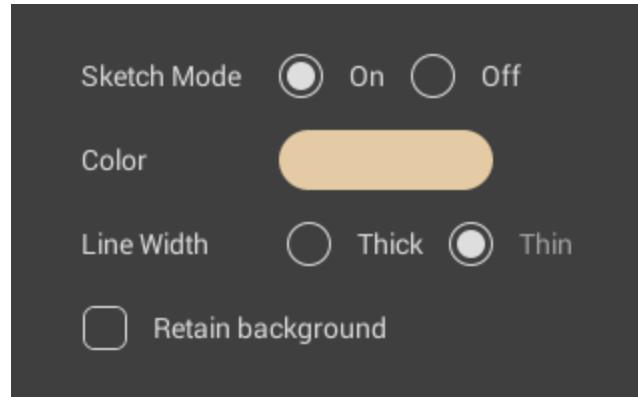
Now, when the content editor clicks **Issue Tracker** in Revit Revizto plug-in, the relevant Revizto model opens with the new issue in it. By clicking on the issue sign (the callout icon) a user can navigate to the same spot in the source file (as long as it is open) in Revit or Navisworks. It is especially important for Revit, as it is there that issues are corrected and navigation is less transparent due to the preferred camera type.

## 8.2 Visual Effects

In Revizto you can edit the way model is visualized, you can also add a watermark displayed on any frame to copyright your files.

**To define visualization settings:**

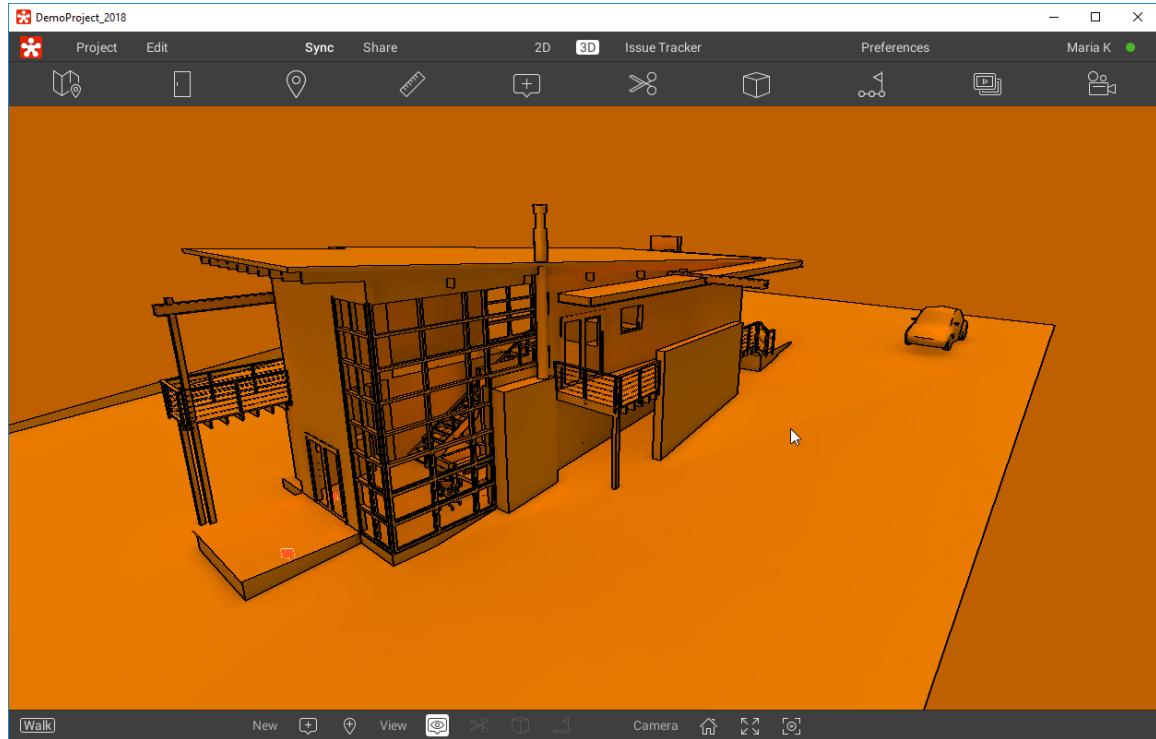
1. Open your project in Revizto.
2. Click **Edit > Visual Effects**. By default, there is no watermark used, sketch mode is turned off, realtime shadows are on. You can:
  - a. Upload any image file to use it as a watermark.
  - b. Switch to the sketch mode and define its settings (line color and line width, background on/off).



c. Turn off shadows.

3. Click the **Apply** button to save and apply your settings to the current model.

The figure below shows a sample sketch-mode visualization without background.



## 8.3 Project Optimization

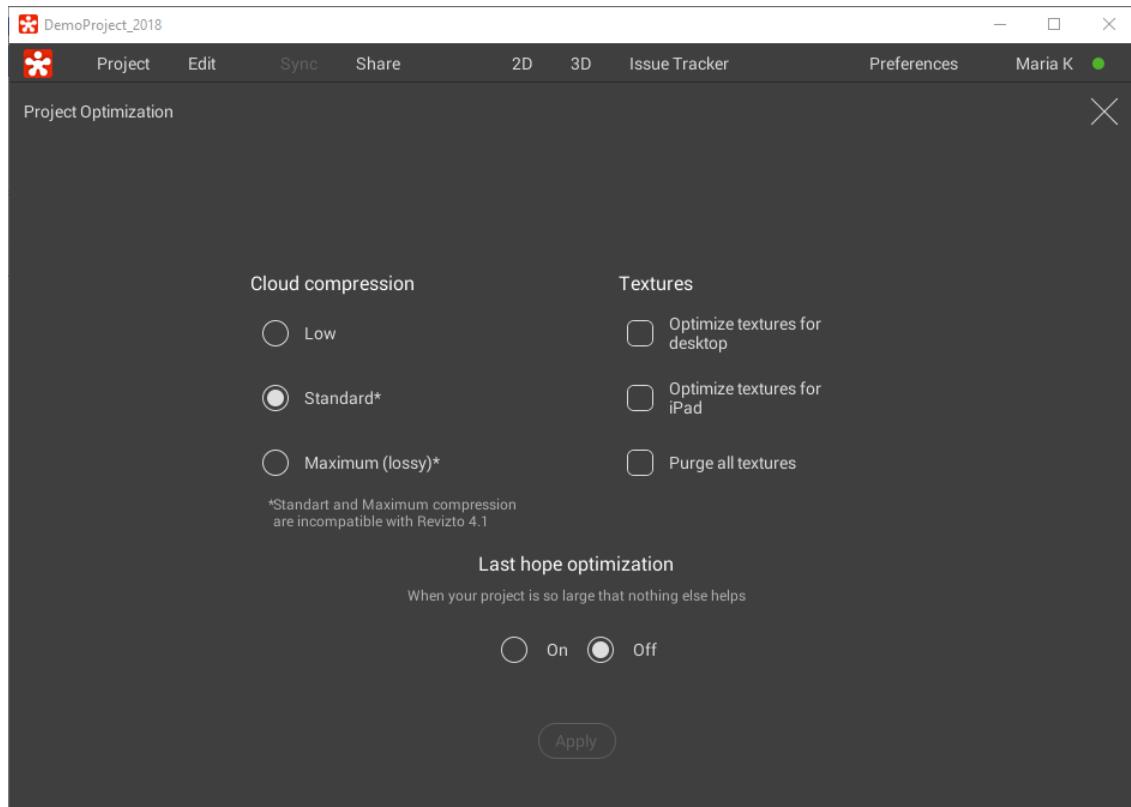
Revizto provides several optimization options to resize large models and enable faster operation on portable devices.

Note that to use the option, you need project-level rights that include uploading models.

**To apply optimization:**

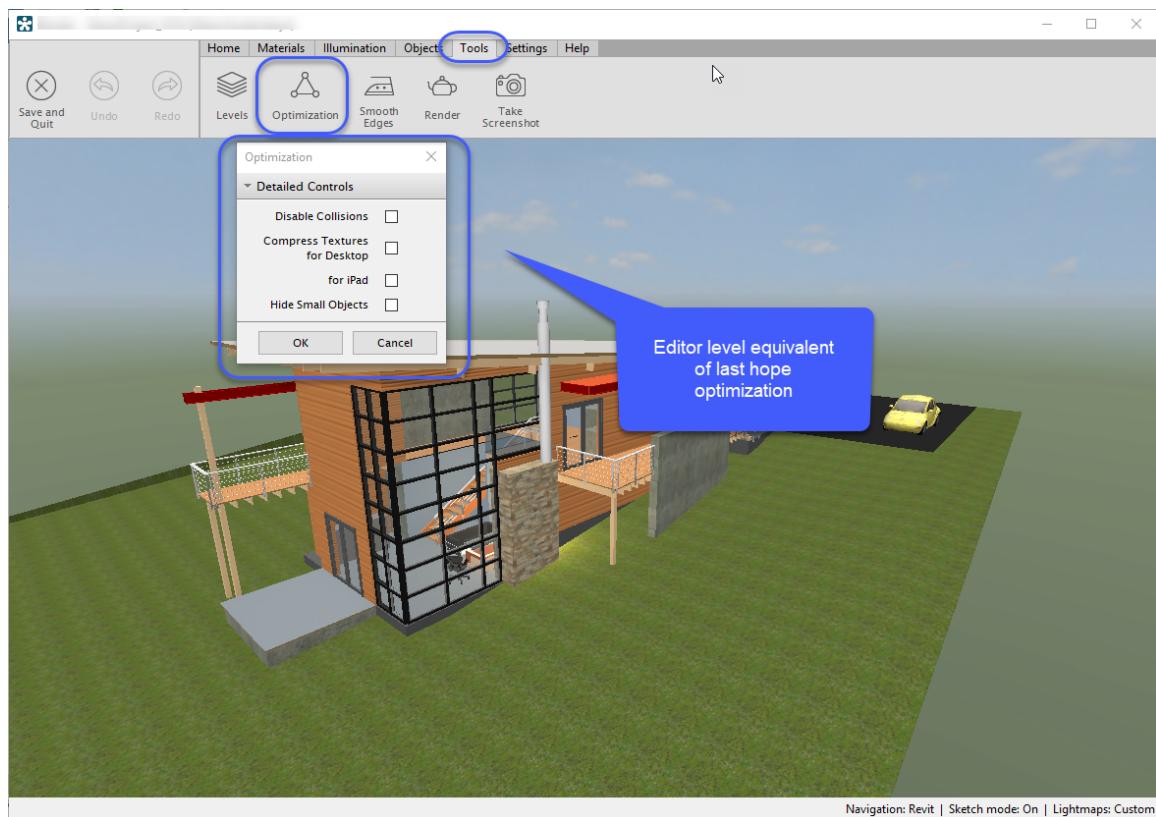
1. Open a project in Revizto.

2. Choose **Edit > Project optimization**.
3. Define optimization settings in the view that opens.
  - a. Cloud compression levels regulate the volume of data sent to the Cloud.
  - b. Texture optimization options reduce the quality of texture display. The **Purge all textures** option removes all textures in the model (solid color is used instead of textures).



4. Click Apply to save and apply your settings. Note that to use optimization, you must close the project in other Revizto components.

The **Last hope optimization option** reduces the model by up to 90%. It is an equivalent of the optimization option available in Revizto scene editor (Edit > Lighting and Materials) and relies on the editor functionality.



Topic under construction

## 8.4 Export from Revizto

[Export to EXE](#)

[Export for MAC](#)

## FAQ

1. - We let go a team member who owns a range of projects. How to transfer ownership?
  - You have 2 options. One is to deactivate (and then delete) this user. Project ownership will be automatically assigned to the License Owner (SuperAdmin). The other option is to manually reassign project ownership before deactivating (and deleting) the user.
  
2. - We let go the License Owner (SuperAdmin). How to transfer the license ownership?
  - Note that only the License Owner can edit their own access level. You have to make sure that before leaving the company, employee who owns and manages Revizto license transfers their rights to another person.
  
3. - My company operates in Canada and has partners in the UK. Both we and our partners have Revizto licenses. Yet, I cannot invite their users as Guests to collaborate in my projects. Why?

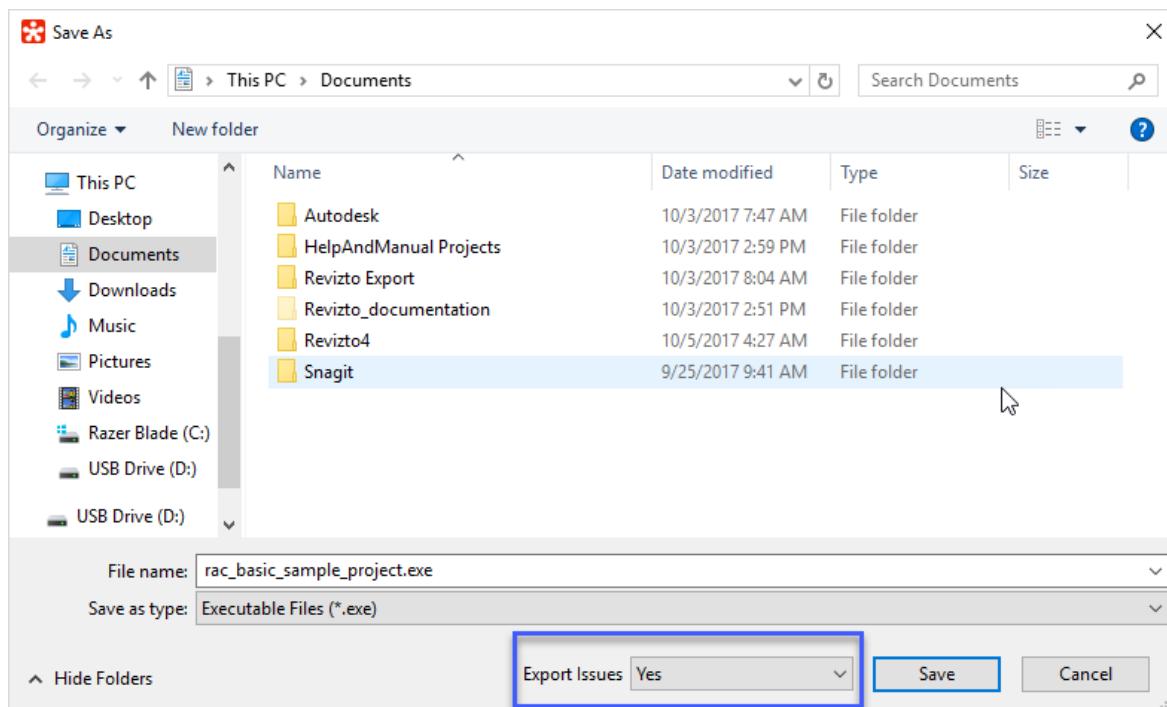
- In Revizto geographies are strictly divided in order to ensure maximum operation speed. Therefore, the Guest status (free collaboration access to members of other Revizto workspaces) is reserved to users within the same geography. To invite a collaborator from a team that has a license issues for another geography, you will have to create a fee-based Collaborator or Content Creator account.

4. - We often get failures and errors while exporting our source files to Revizto. What to do?

- If your working folder is located on a network location, not on a local collaborator PC, try moving it to a local disk. Revizto uses SQL Light, therefore multiple requests to a remote folder can cause failures and errors.

5. - We want to show the project to our colleagues/partners from another company, but they have no Revizto license. Also, we don't want them to see our issues.

- You can use the Export to EXE option (the Project menu). Also, choose No in the Export Issues field to hide your issues. The resulting file will be accessible on any Windows x64 machine without Revizto.



6. - I am currently using the French keyboard and cannot use the WASD viewer navigation option. Can I define other buttons as controls?

- No, you cannot customize control buttons, but you can use arrows instead of WASD.

7. - I exported a model from Revit to Navisworks and then to Revizto. But I cannot see the entire model, only one element. What has happened?

- When exporting a Revit model to Navisworks (or importing it from Navisworks), pay attention to export/import settings. Your problem is likely to have been caused by exporting the first 3D view instead of the entire project. Note that you can also export your model directly from Revit to Revizto and use Navisworks to export clashes.

8.

# Troubleshooting

## Addressing the Support Service

Before addressing the Support Service, please, read this section and the [FAQ<sup>86</sup>](#). If nothing helps, email to your support contact. Make sure to attach Revizto logs (compressed as .zip) for the relevant period from your working folder.

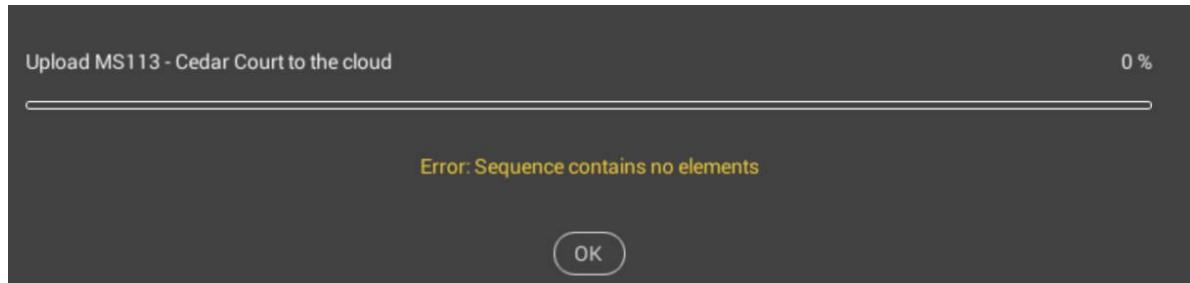
## Known Issues and Solutions

### Installation Troubles

Revizto uses Sentinel LDK Service to implement licenses. Components of this service may conflict with some anti-malware software. If you experience problems during installation, try turning your antivirus off temporary. You can also try

### Corrupted model

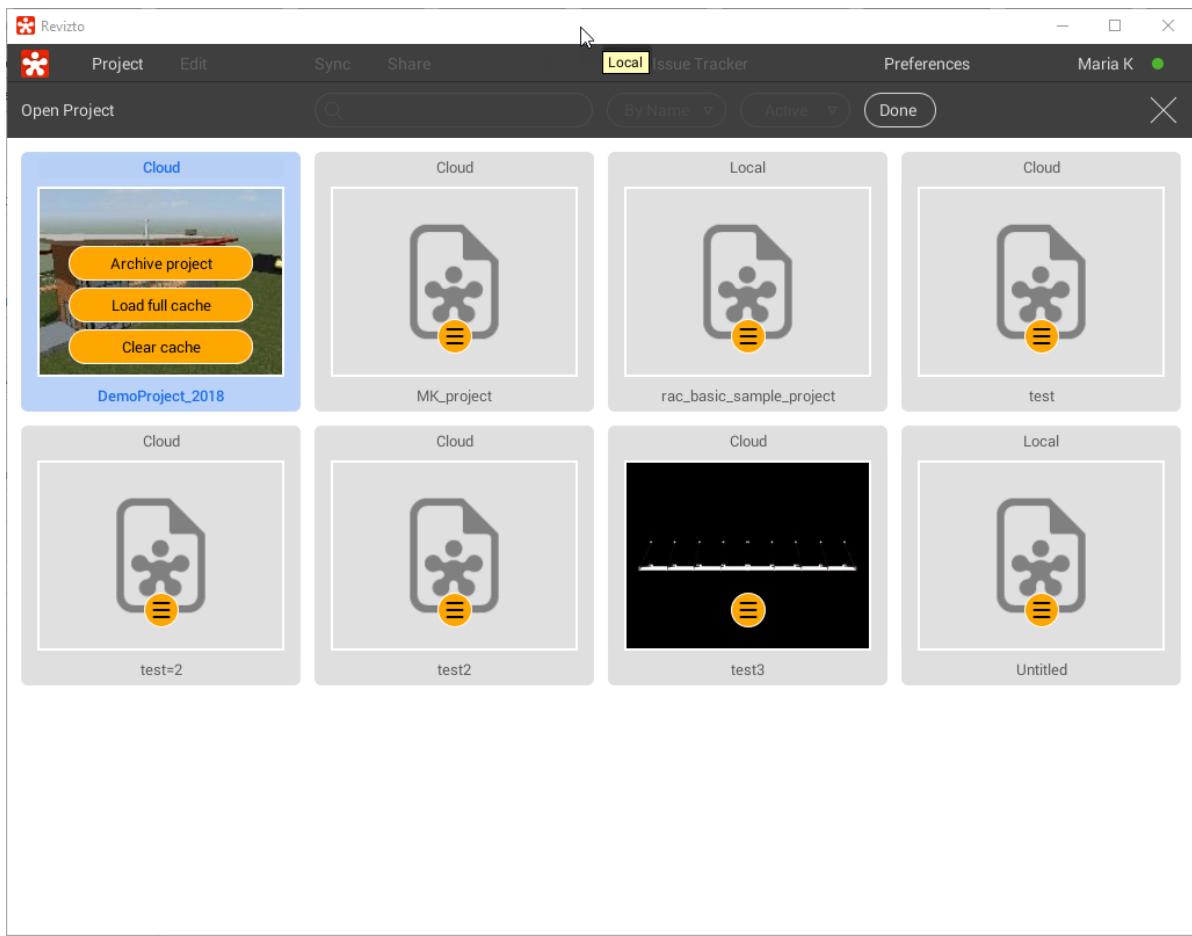
Revizto model can become corrupted due to some user actions or local software errors/failures. Than upload errors may occur (see example below).



To remedy for it, we recommend to clear the model cache and to re-export a fresh version from the source software.

#### To clear cache:

1. Make sure that the model is not open in Revizto.
2. Open the list of projects in Revizto.
3. Click the **Edit** button in the upper menu.
4. Click the yellow circle button displayed at the tile of the required project.
5. Choose the **Clear Cache** option. Confirm your action.



The project folder then disappears from the local working folder and you are free to create a fresh export without conflicts.

#### Failure to download model updates

If users fail to check for model updates and get license invalidity messages, make sure that SSL inspection option is turned off on your firewall (or add Revizto servers to the exception list). If the problem persists, address the Support Service with your Revizto logs attached.