Table of Contents

I Intoroduction

1.1 Technical requirements

1.2 Terms and abbreviations

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

II Role Guides

Enter topic text here.

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, 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).

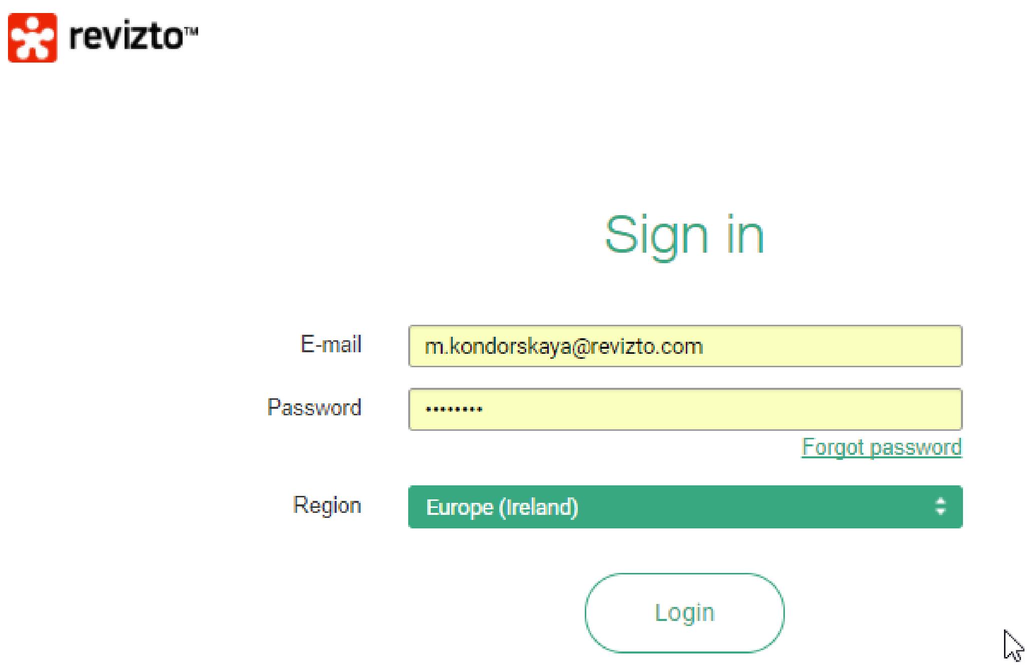


Figure 1 - Log In Page

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).

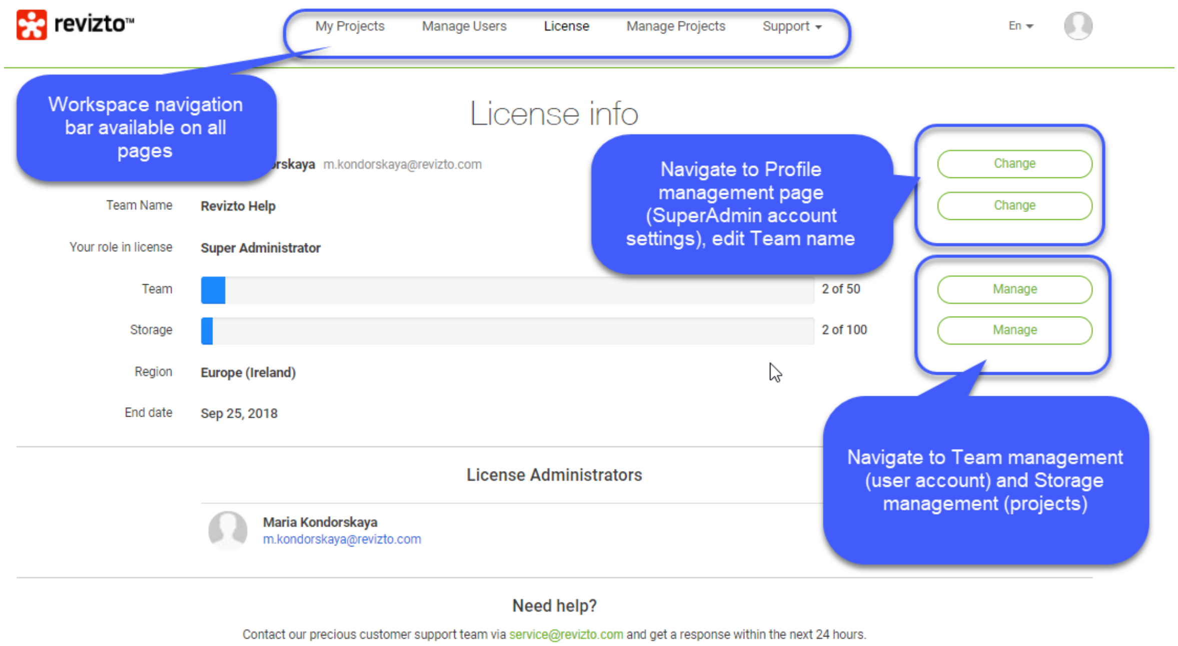


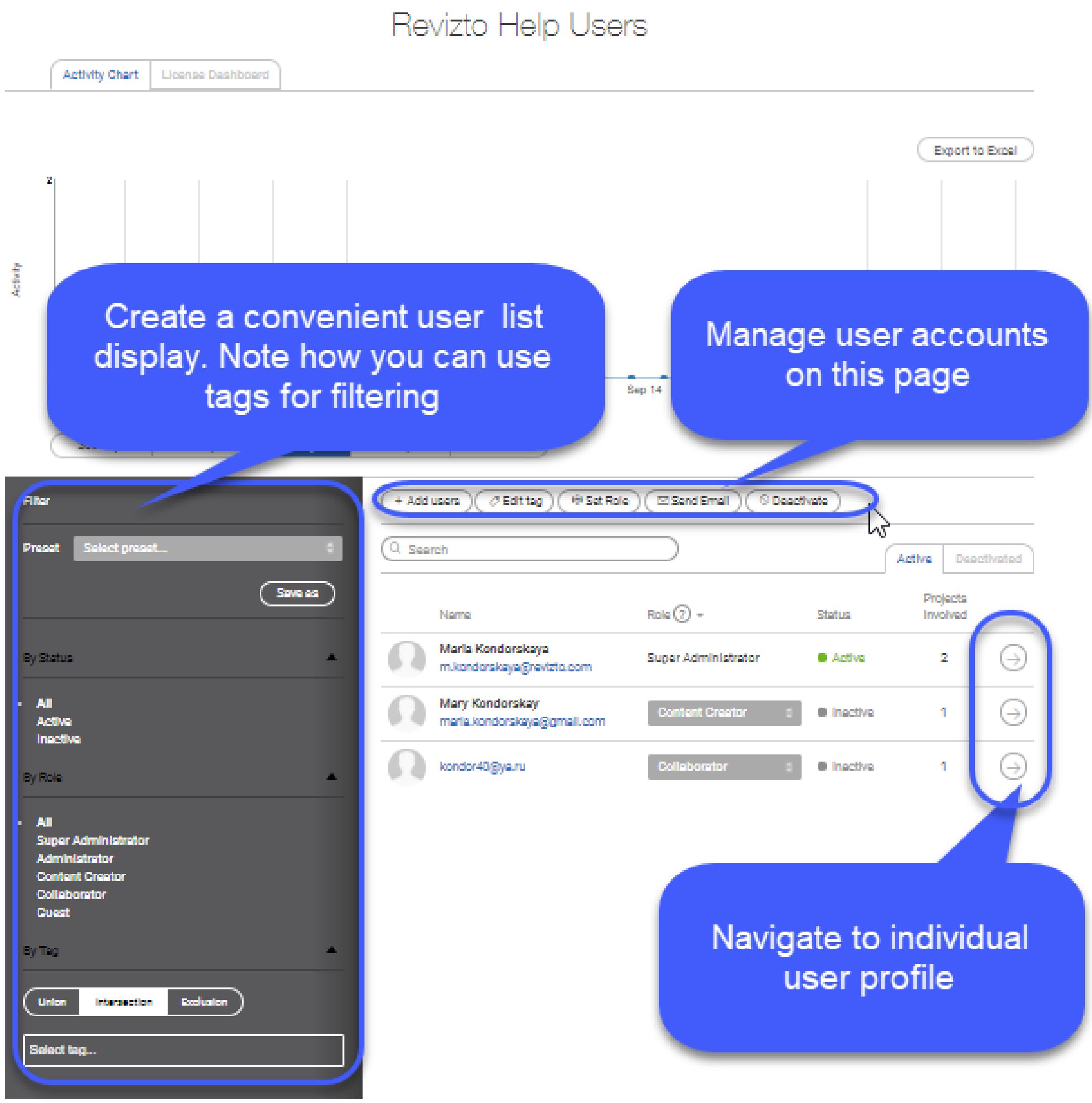
Figure 2 - License Info Screen

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
- Monitor user activity



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 workspace level:

- SuperAdmin (or License owner): assigned to a license owner, can be transferred to another user. There can be only one SuperAdmin in a workspace (role modification and removal are not available for this user). The License Owner has the broadest access rights.

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

Note: This role is by default assigned to 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.

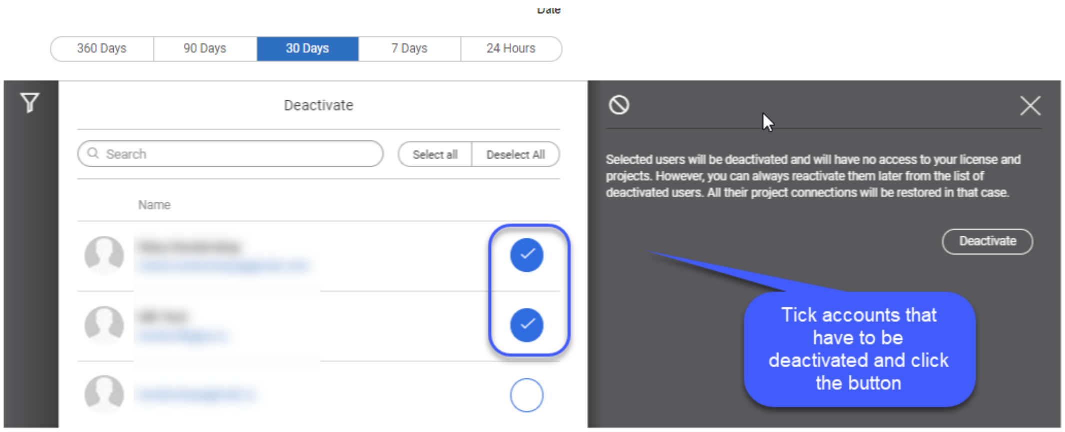
Warning: Neither the License Owner (SuperAdmin) nor the Administrator can edit user credentials. Therefore, make sure to timely deactivate users when people leave the company. Also make sure to duly transfer the License Ownership if the relevant employee leaves the company.

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.

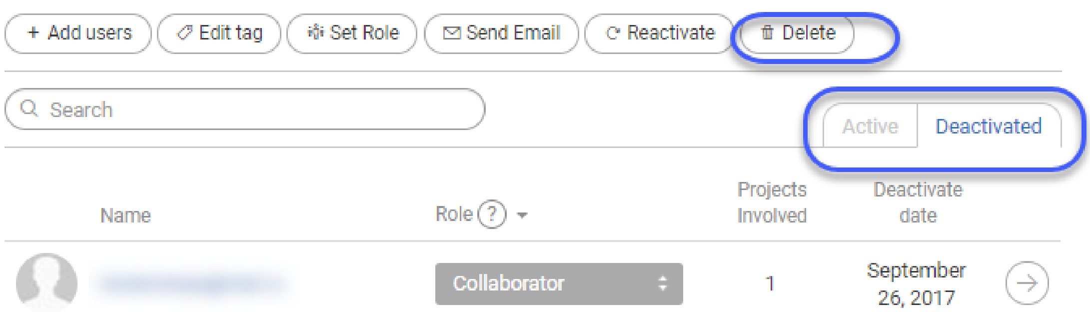
To get back to the main view, click X at the right side.



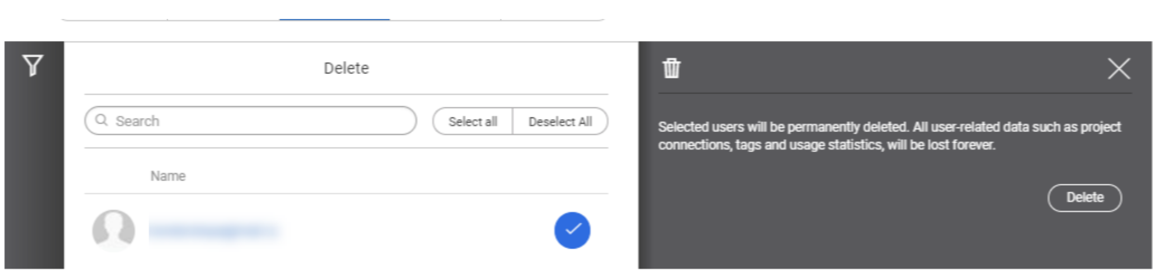
Deactivated users can be reactivated any time with the previous access level and project memberships. However, note that project ownership is not restored. At deactivation project ownership is automatically assigned to the SuperAdmin and reactivation does not reverse it. It is recommended to reassign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



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.

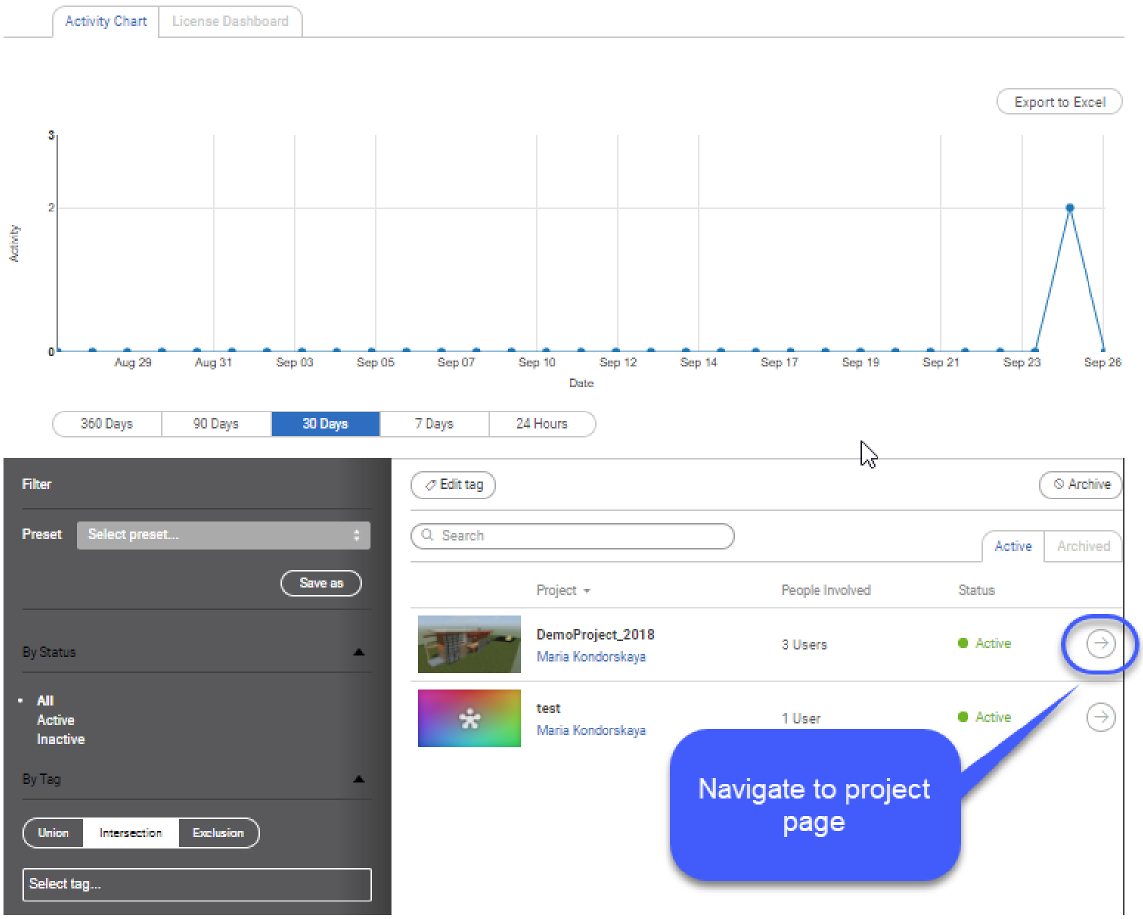
III. Project license management.

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).

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 Revisto.

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

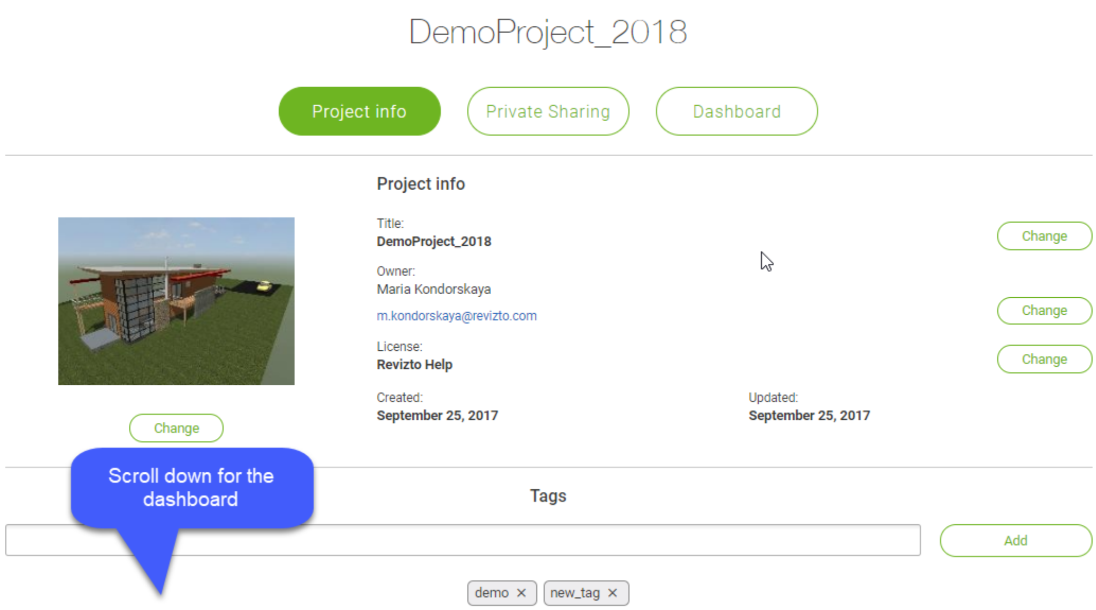
Availability of these views depends on the user license role and project access level (see the table below).

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

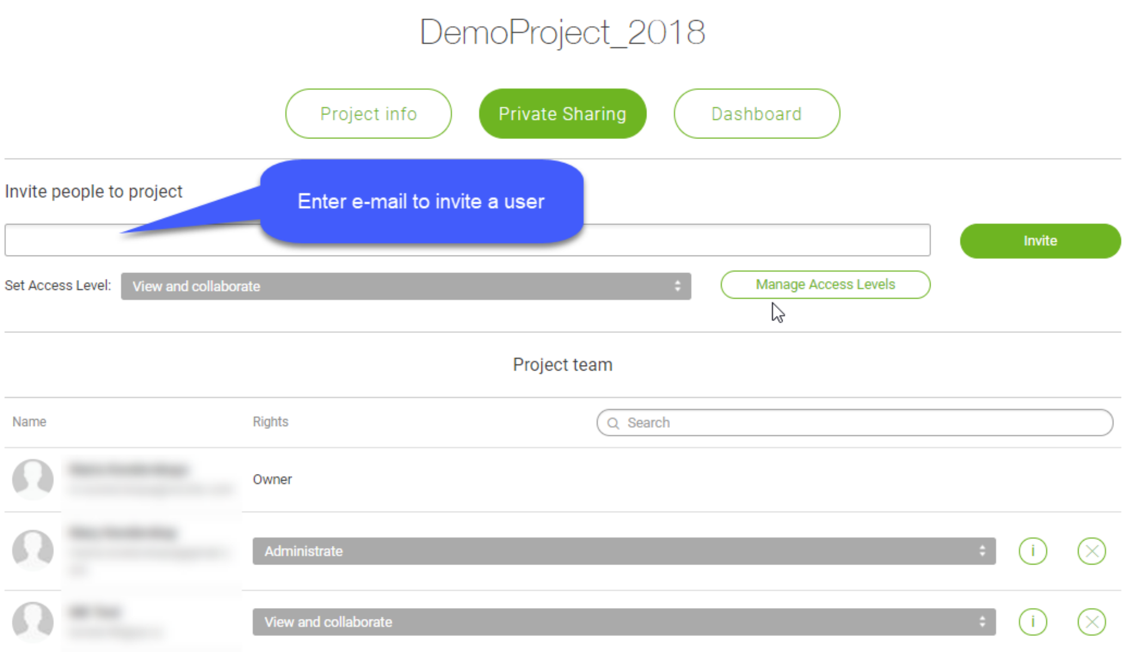


Private Sharing

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

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

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



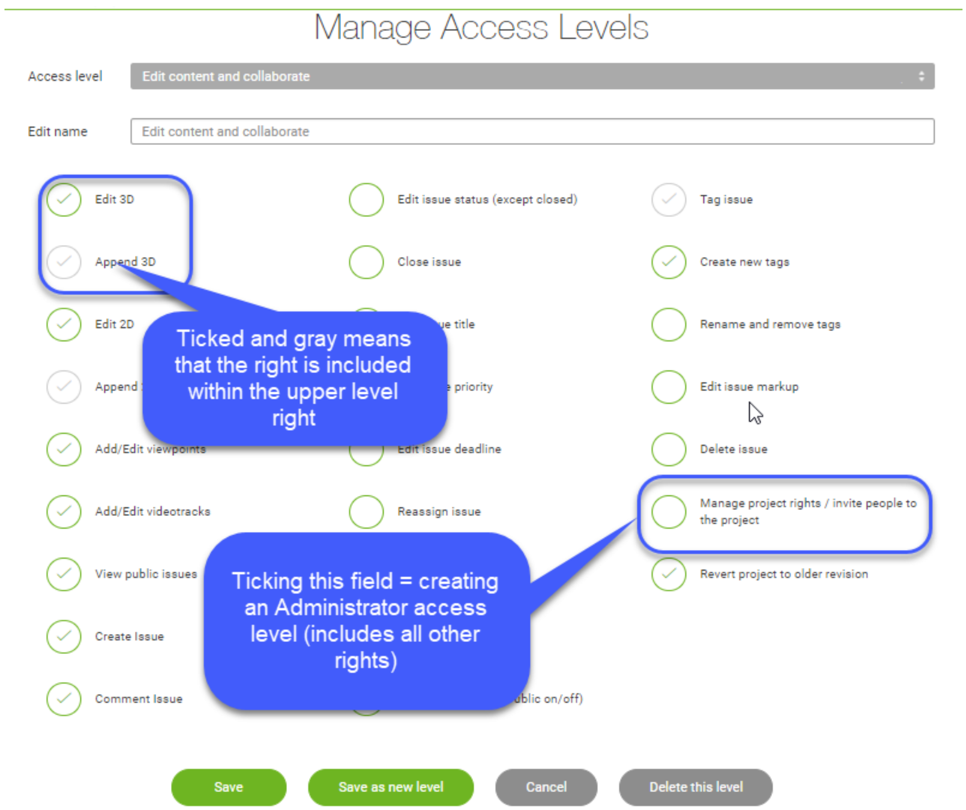
Manage access level

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

To create a new access level:

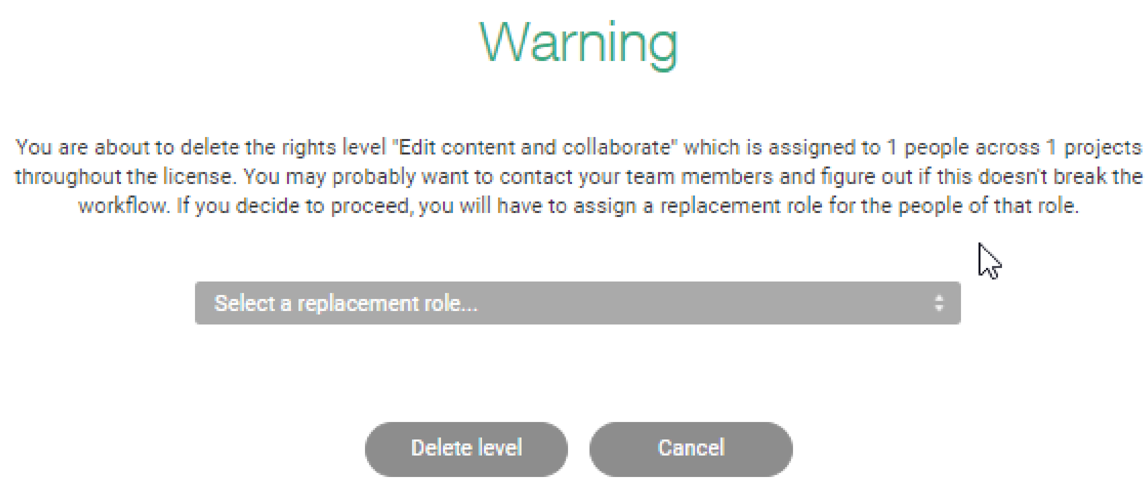
1. Navigate to the ***Private Sharing*** view of the team workspace web GUI.
2. Click the ***Manage Access Levels*** button. The ***Manage Access Levels*** view opens.

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



3. To edit an existing level:
    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.



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.

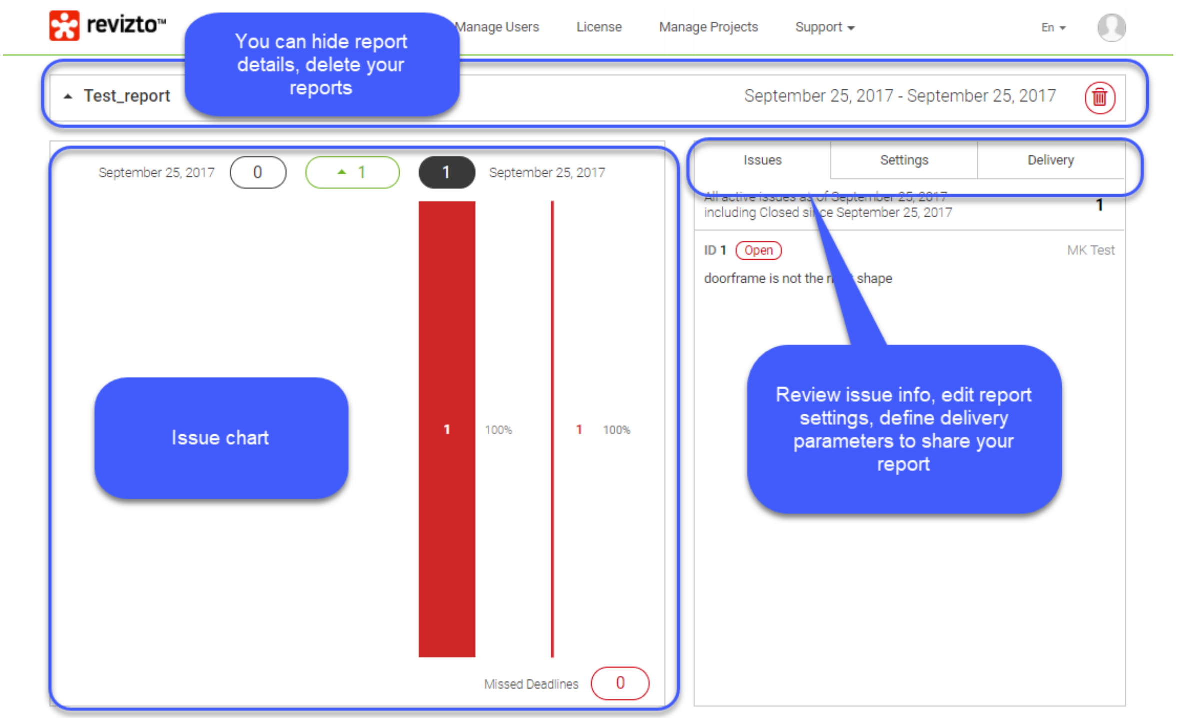
An Excel version contains full user data (name, email, role, last activity time, total duration in the ***Active*** status, tags, number of projects and their names). The chart is also included.

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

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2.3 Content Editor

Enter topic text here.

2.4 Viewer

Enter topic text here.

III Licensing. Workspace Configuration and Management

Revizto license is provided for a specific number of users and 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, 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).

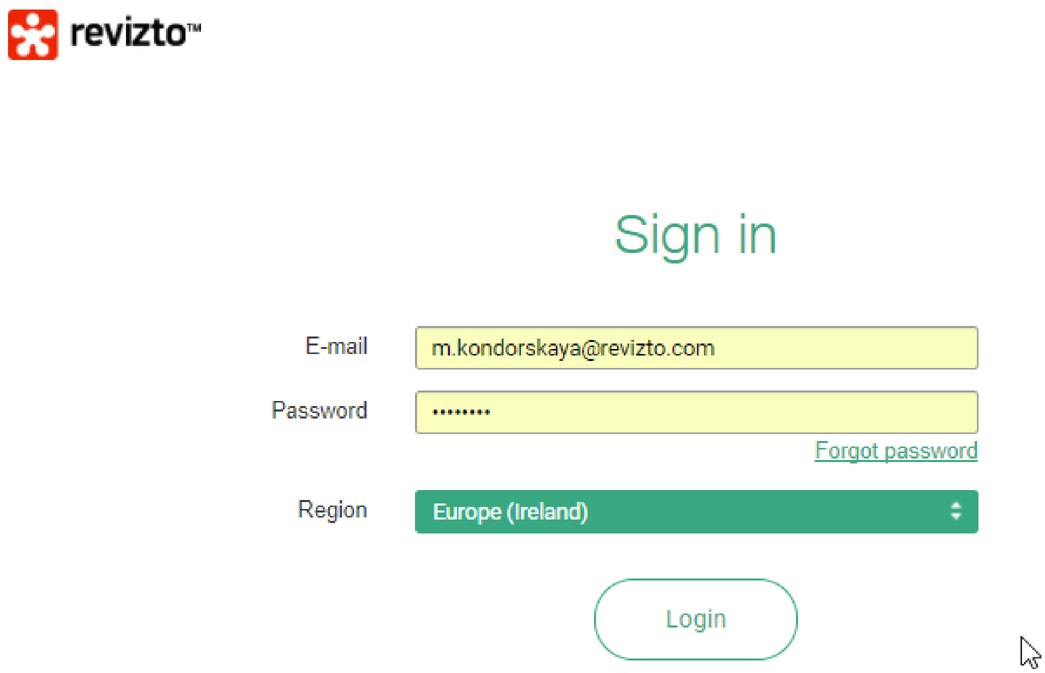


Figure 3 - Log In Page

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).

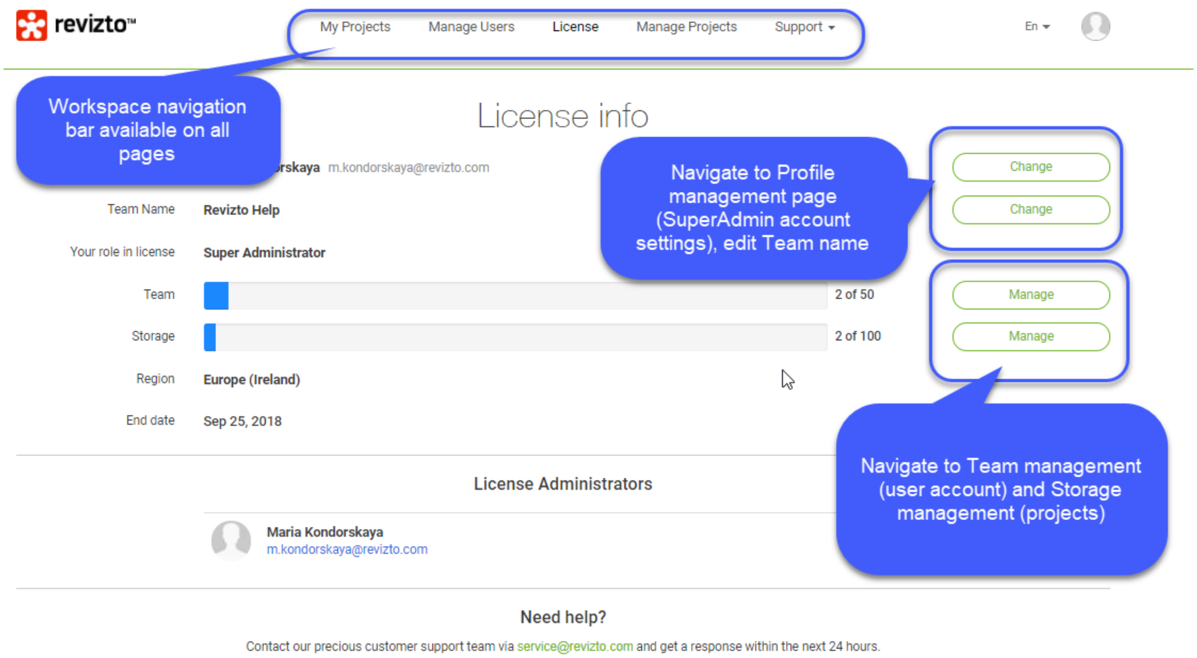


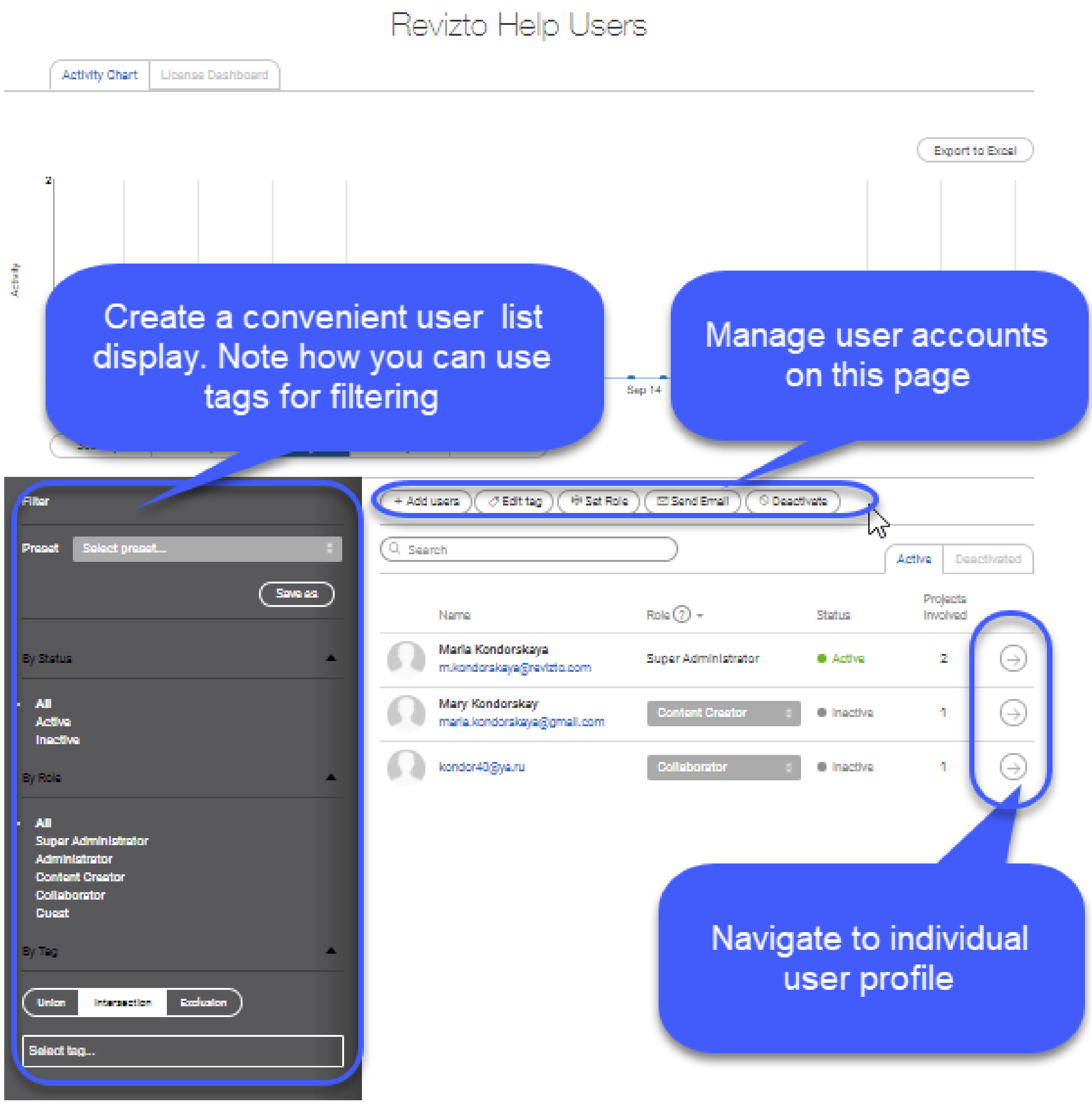
Figure 4 - License Info Screen

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
- Monitor user activity



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.

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- 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.
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- 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.

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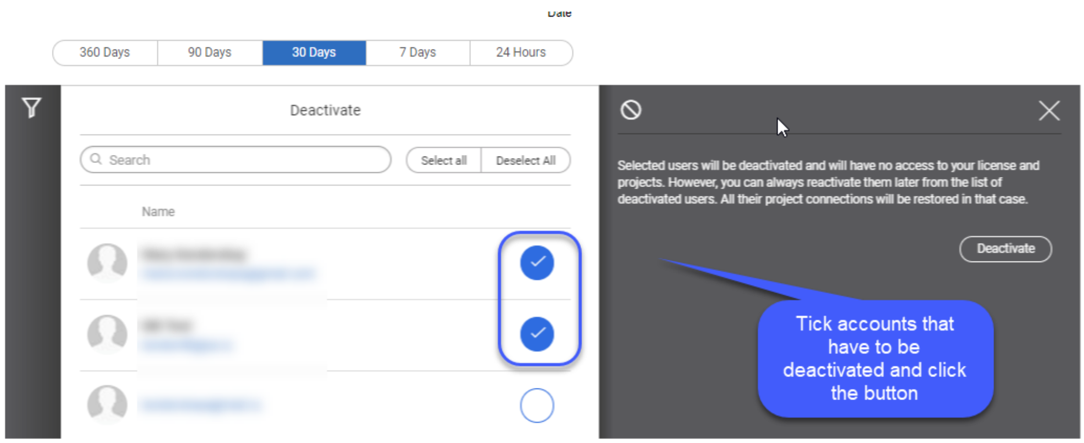

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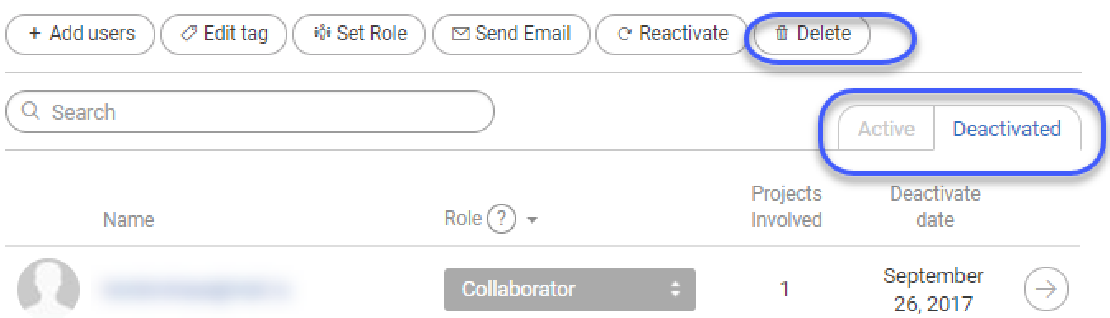

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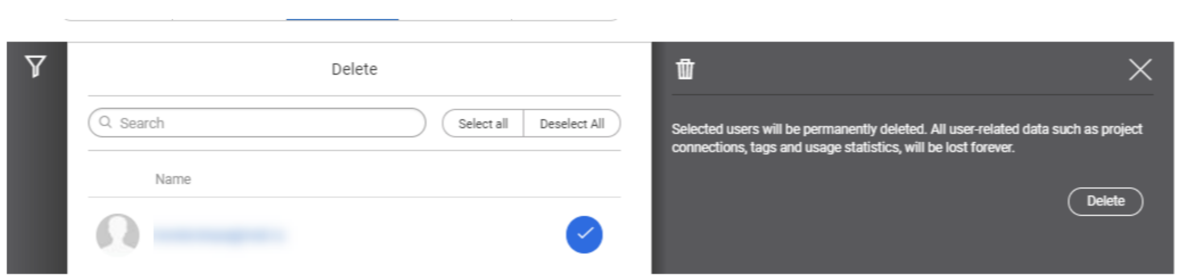

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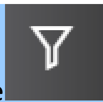
Tip: use  icon to expand the filtration panel and filter the user list to reduce it before selecting specific users and applying any action to them.

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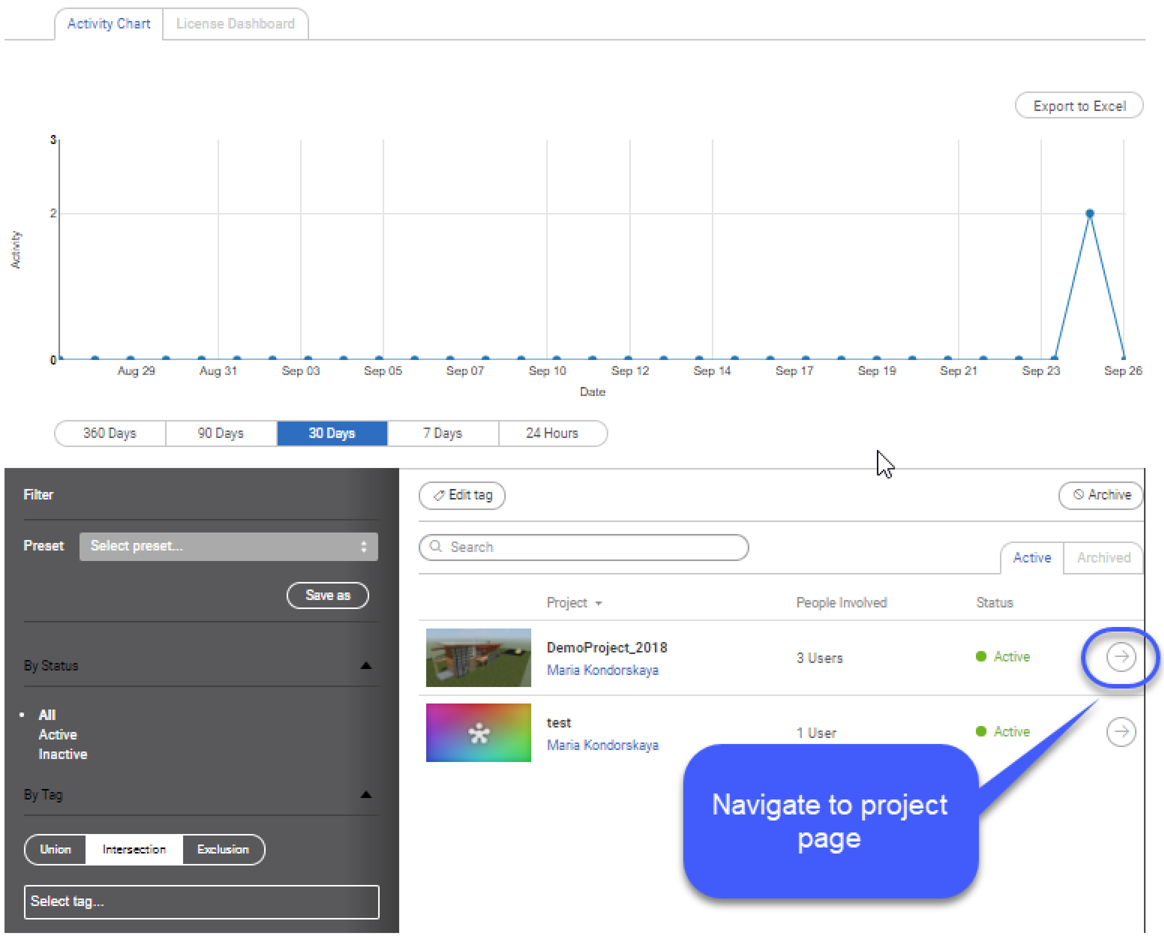


To archive project/s:

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 Revisto.

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

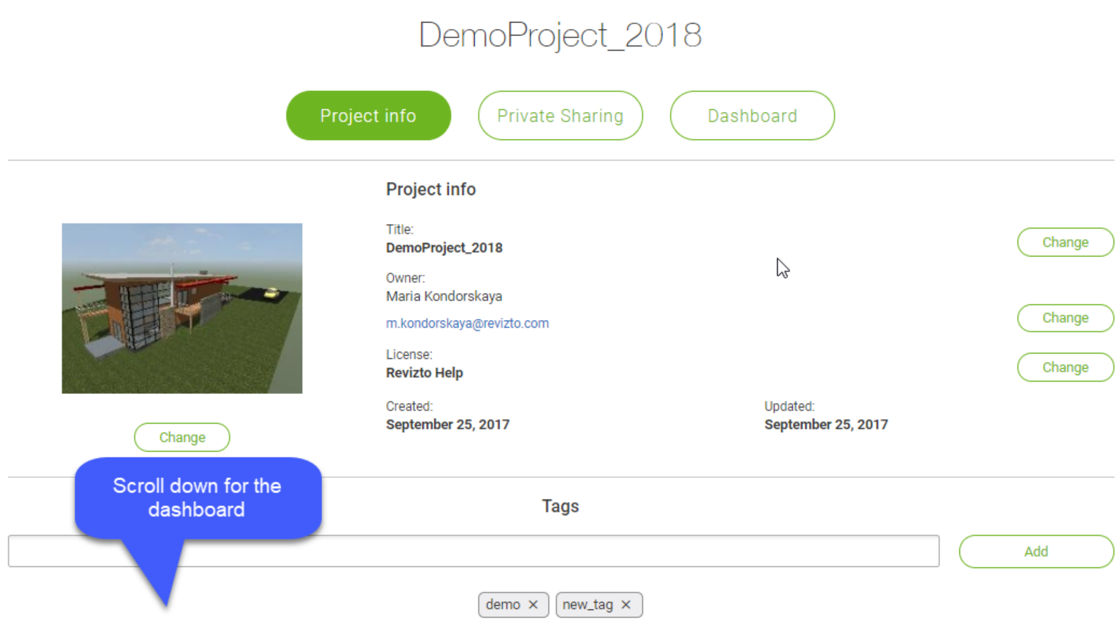
Availability of these views depends on the user license role and project access level (see the table below).

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



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

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

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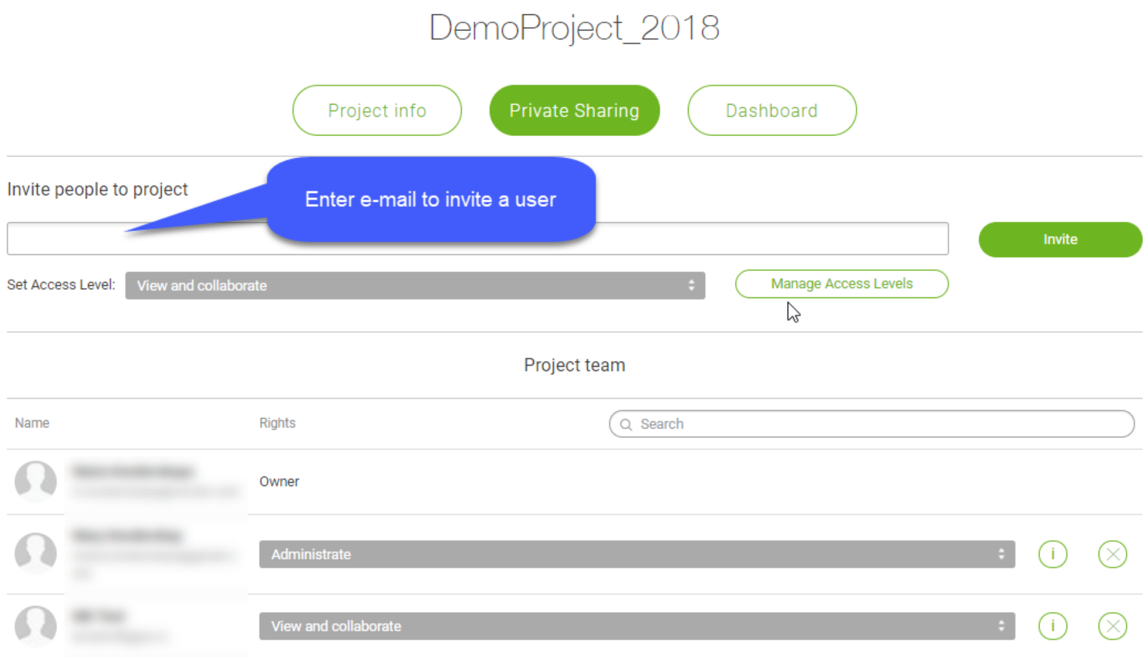


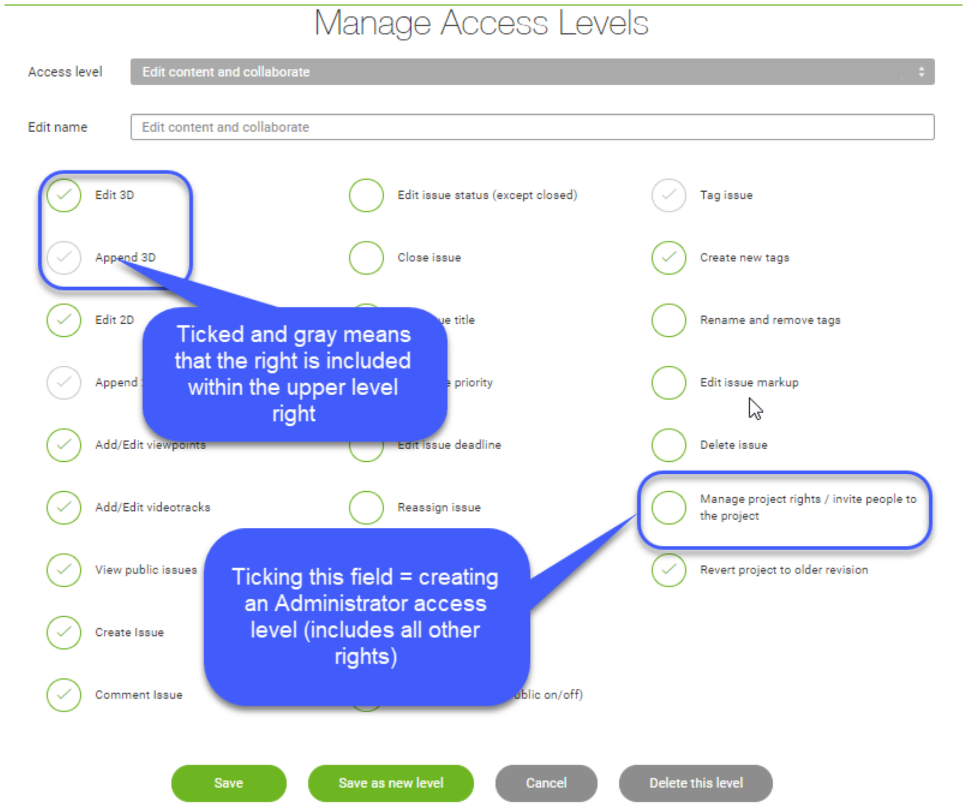
Manage access level

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

To create a new access level:

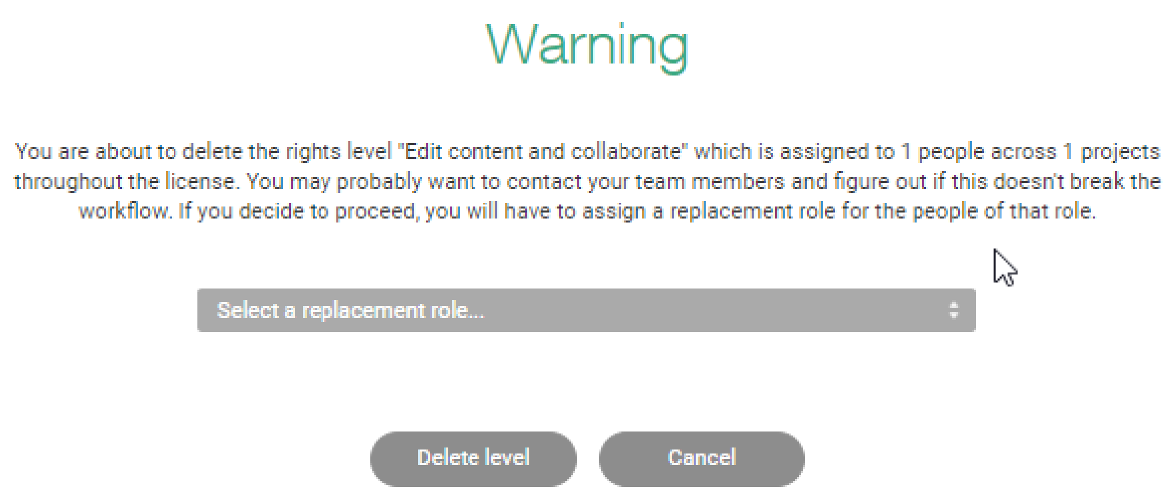
1. Navigate to the ***Private Sharing*** view of the team workspace web GUI.
2. Click the ***Manage Access Levels*** button. The ***Manage Access Levels*** view opens.

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



3. To edit an existing level:
   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.



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

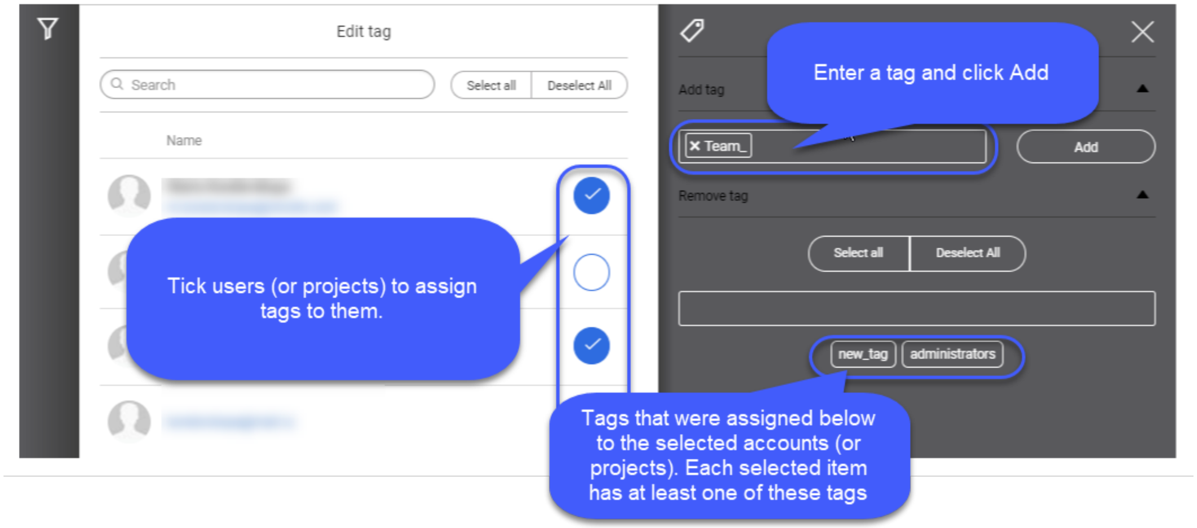
You can create and assign an unlimited number of tags to user accounts and projects. Tags provide an additional filtration options in large environments.

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.

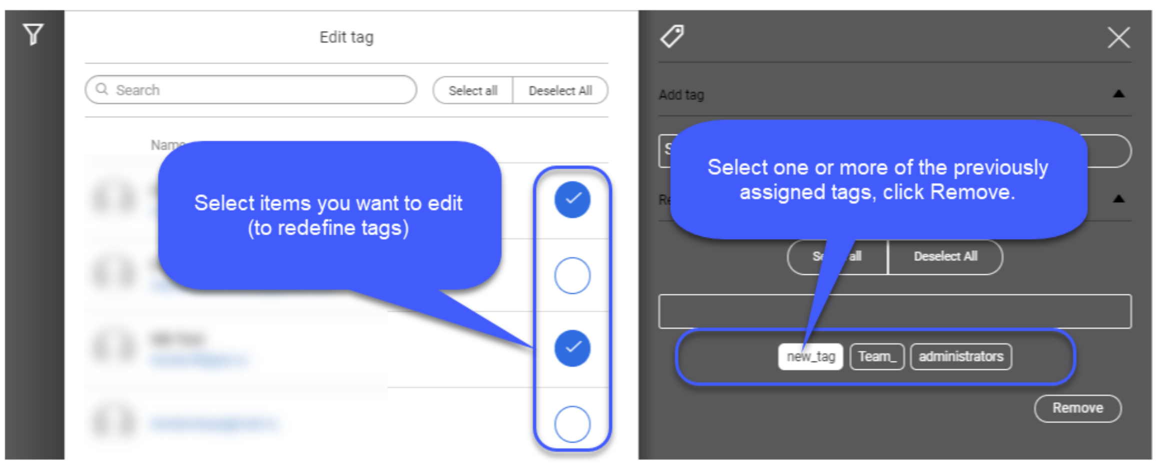
To create a tag from a general view:

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.

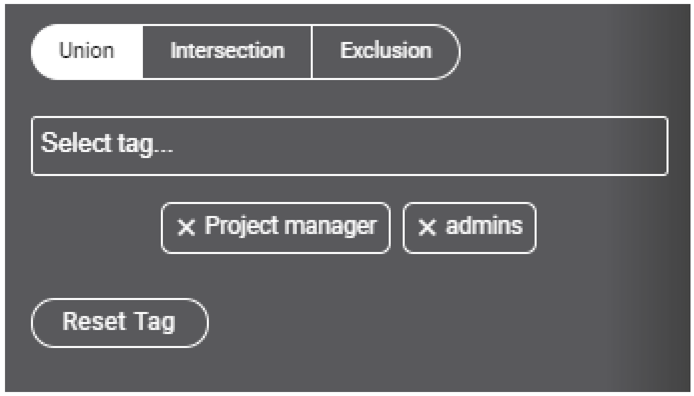
To remove tags, use the same window (see the image below).



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).



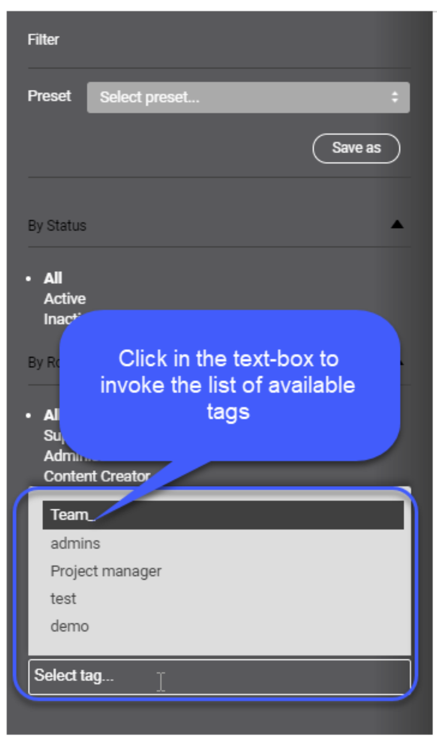
Using tags for filtration

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



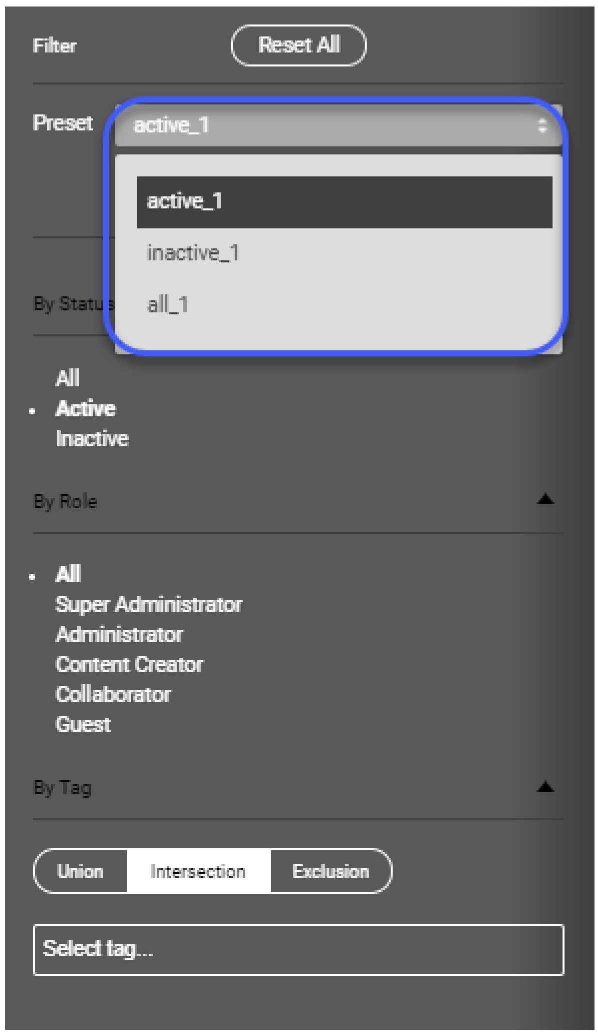
Creating Filtration Presets

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.



IV 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.

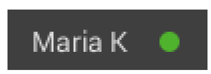
Network requirements

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

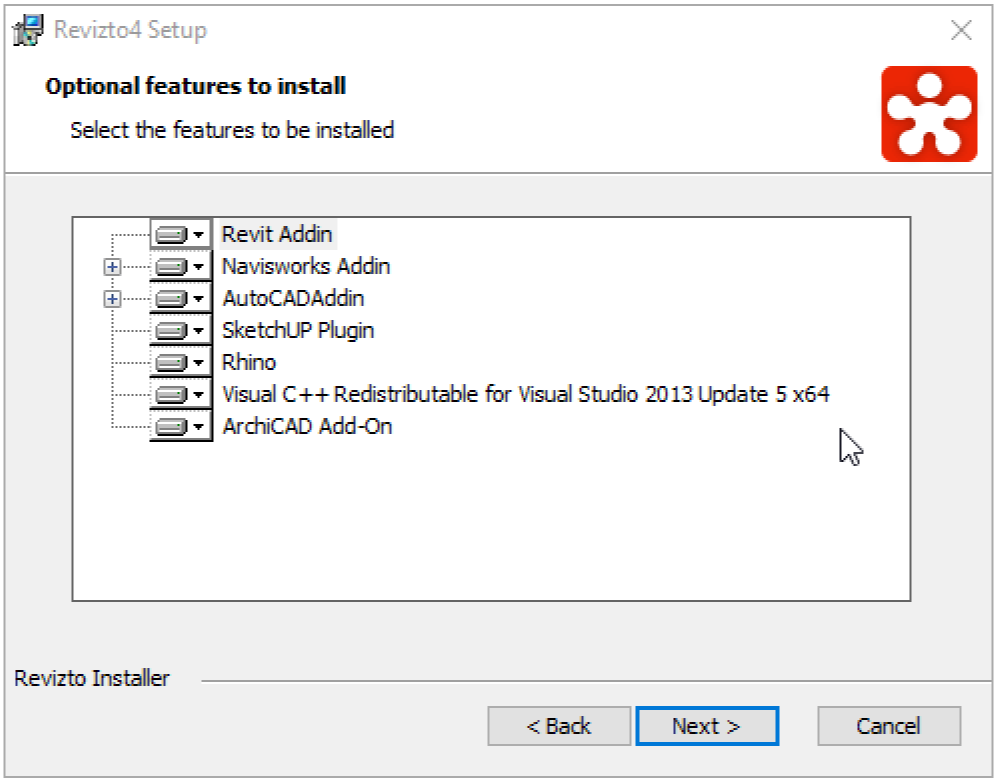
If the company is using the proxy server, you need to set up proxy server settings in Revizto. In log in window click the Proxy server settings in the right top corner of the screen and fill in all required information.

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.



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.

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

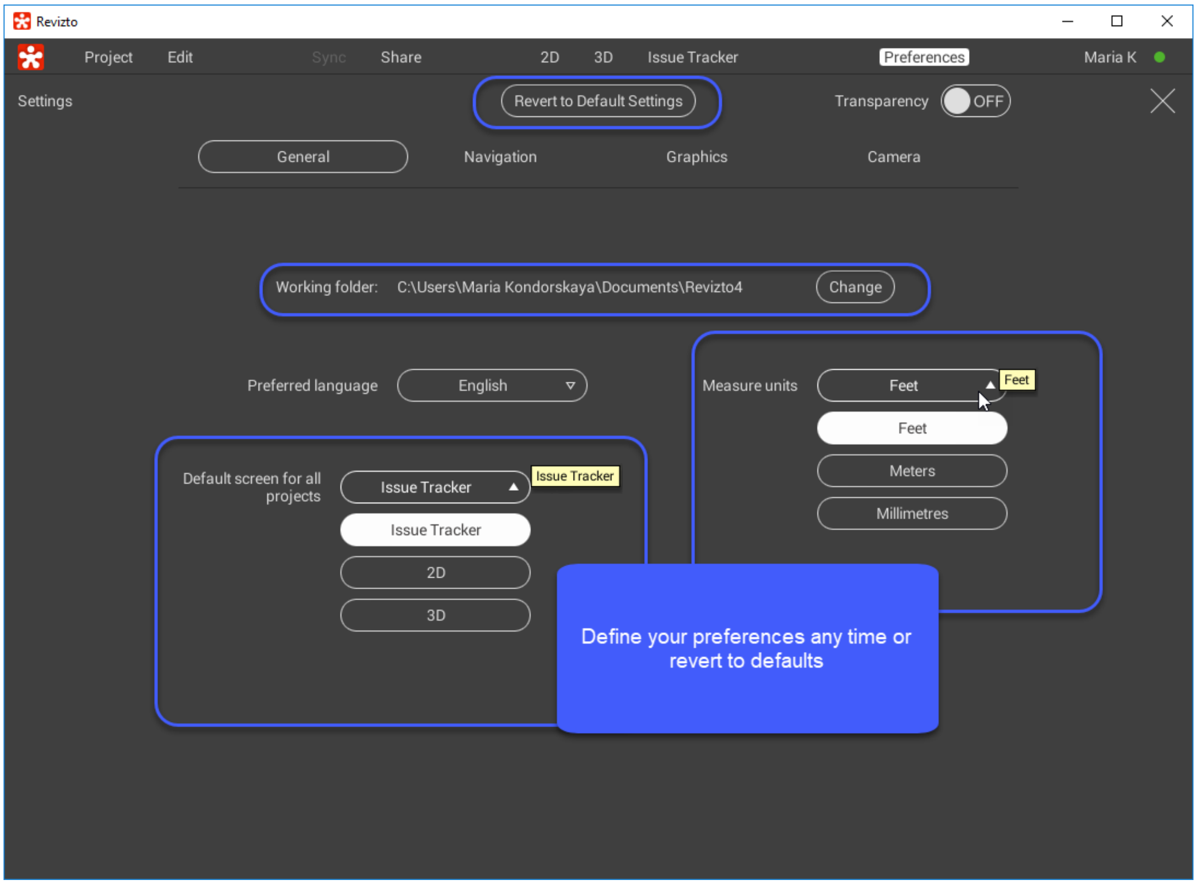
Revizto can be installed in the quiet mode (without UI) using the following keys:

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

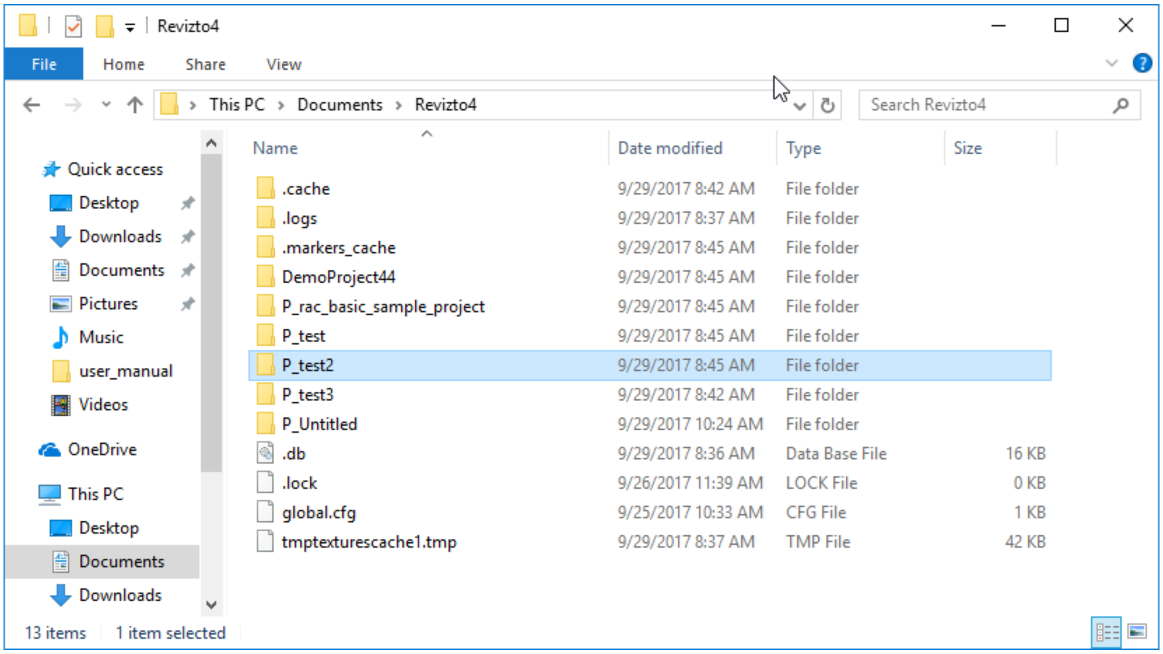
Tip: to quickly access the installation log, open the command line and enter “C:\MyPackage\Revizto(x64)-4.4.XXXXX.msi” /L*V C:\MyPackage\ReviztoInstall.log” in it.

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

Installation

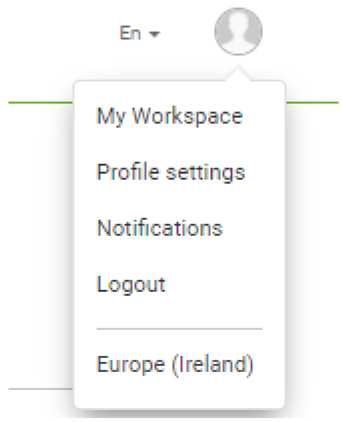
V Using the Web GUI

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.

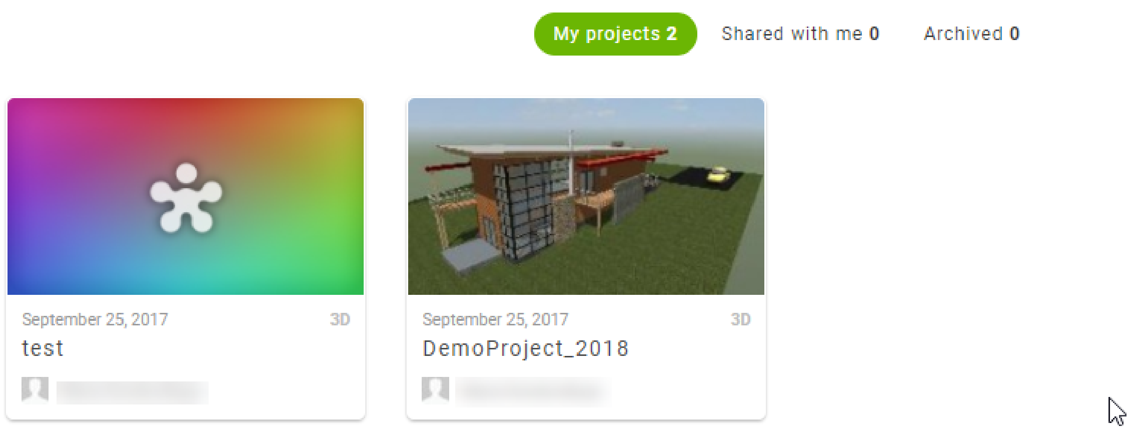
5.1 My Projects

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.

TOPIC UNDER CONSTRUCTION

5.3 Managing Notifications

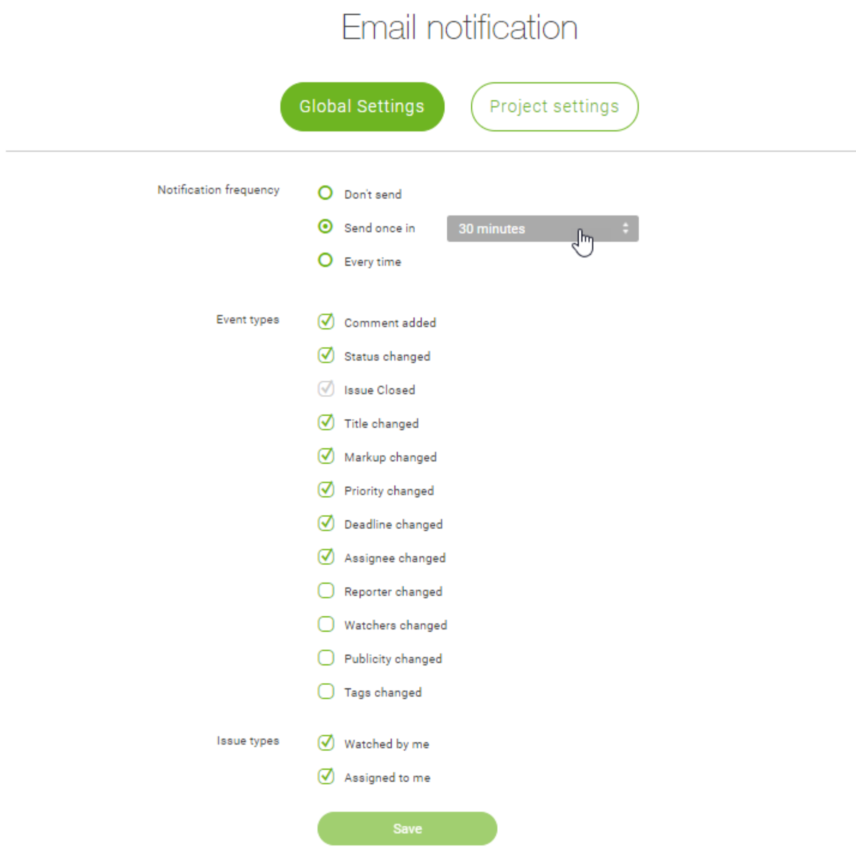
Notifications (messages from Revizto emailed to a user in response to a specific event) can only be edited by users in the Web-GUI.

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. Navigate to the ***Notifications*** screen of your web GUI. By default the ***Global settings*** view is displayed.

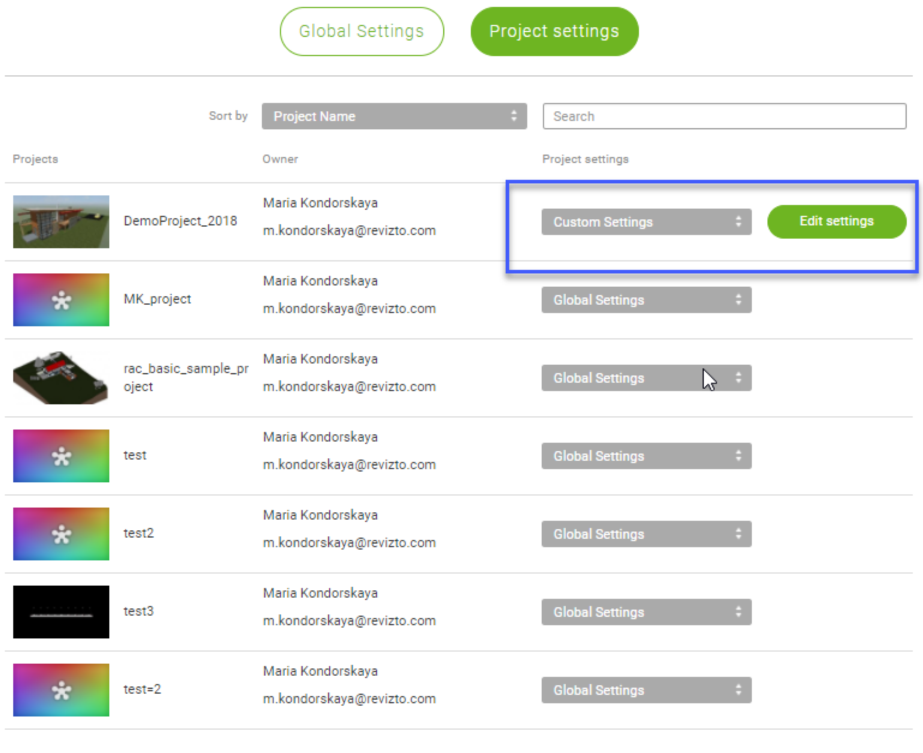


2. Define notification frequency. You have three options. The ***Don't send*** turns all notifications off, the ***Send once*** in allows setting the frequency, the ***Every time*** option means that a notification is sent every time a triggering event occurs.
3. Choose event and issue types you want 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 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.



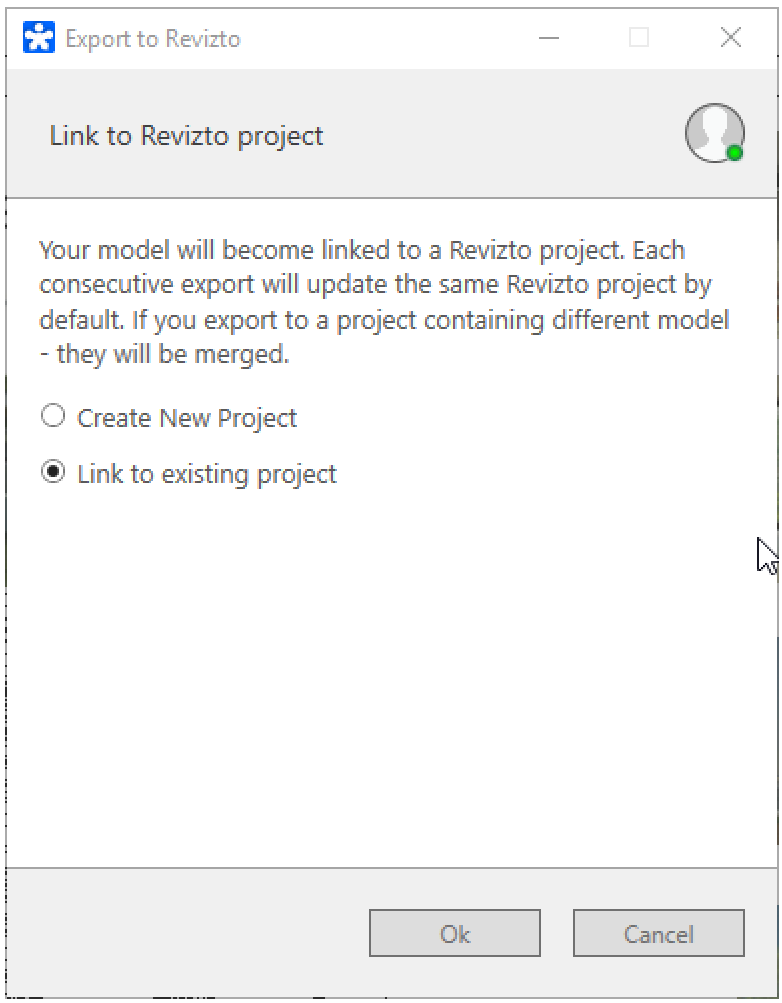
6. Click the ***Edit settings*** button. It navigates to the notifications editor similar to the one used to define global settings (the project name is displayed at the top of the screen).
7. Make your changes and save them. You can redefine global and project notifications settings any time for your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

VI Source Export to Revizto

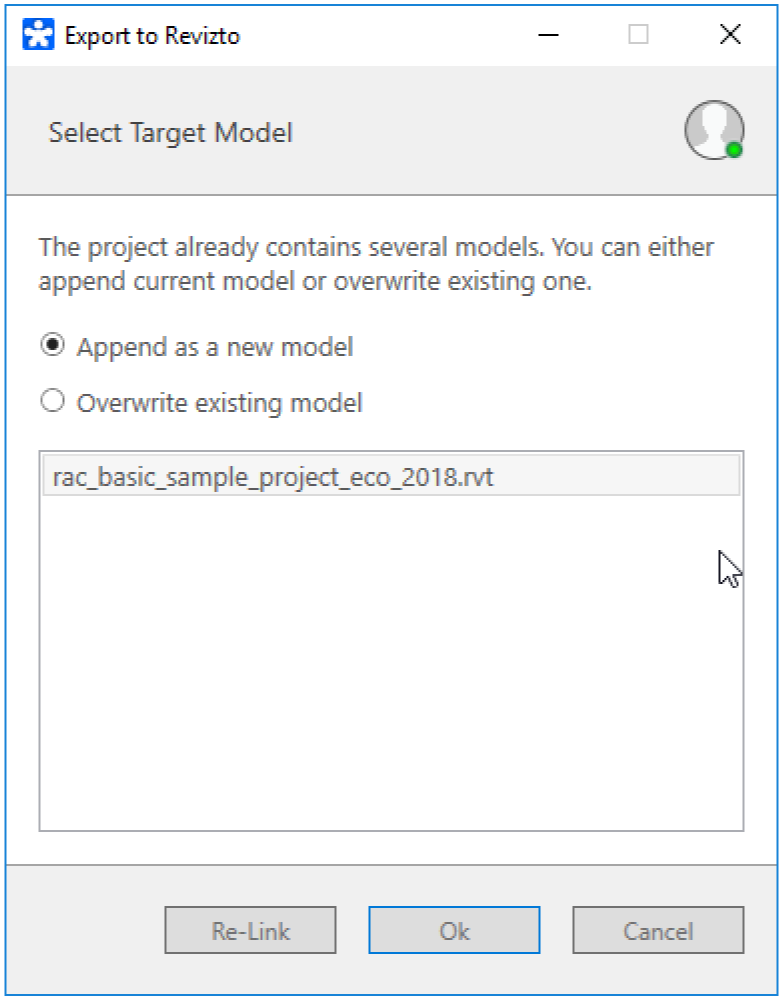
General Procedure

In general, all supported source files are exported to Revizto according to a standard 4-step procedure implemented via the Revizto plugin.

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.

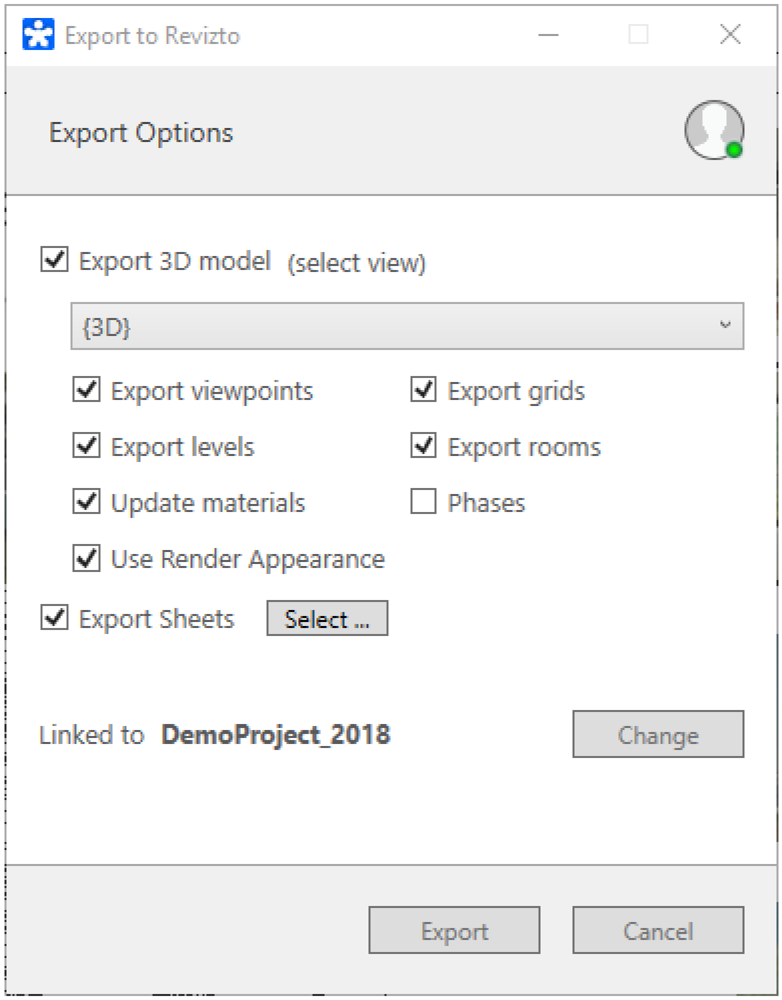


5. For an existing project, choose whether to overwrite existing files or to append new files to them. For a new project, enter project name.



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.

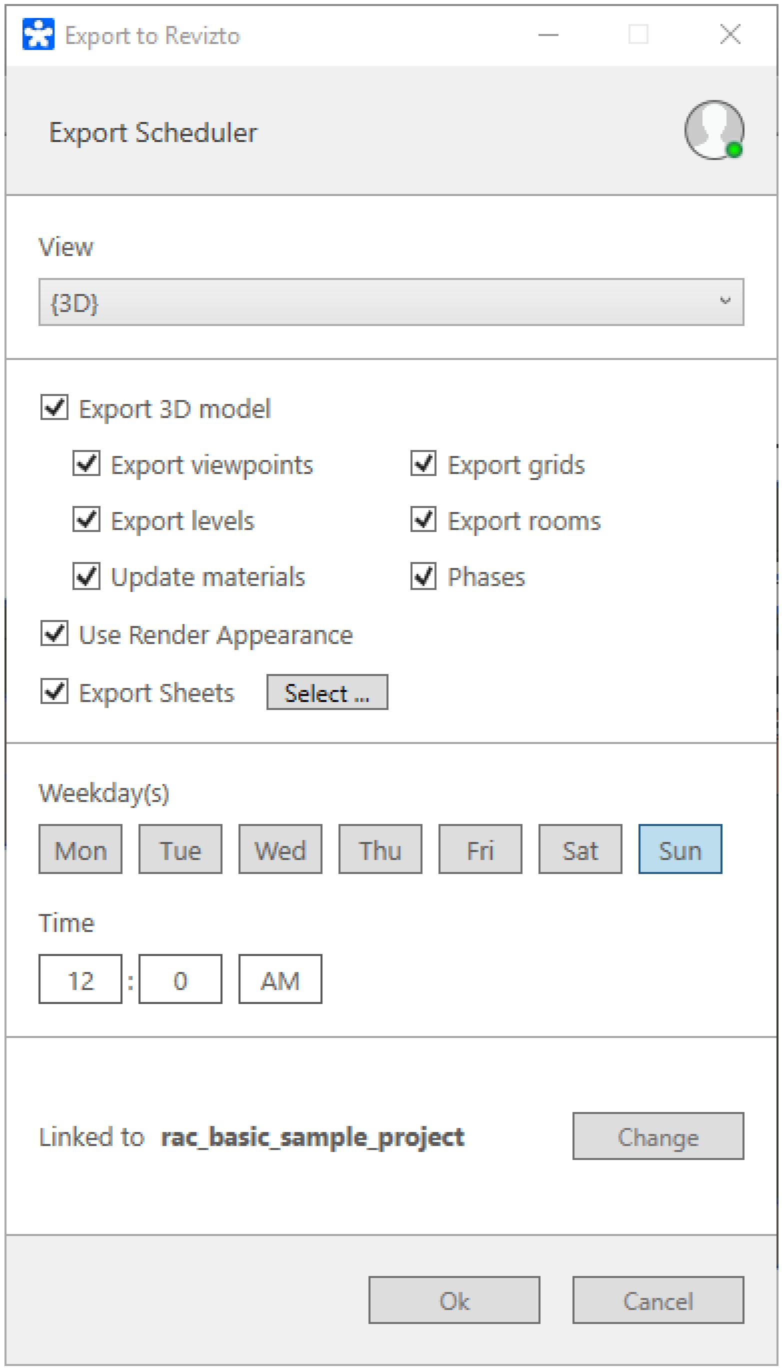
Using Revizto Plugin

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 you 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

Cloud Synchronization

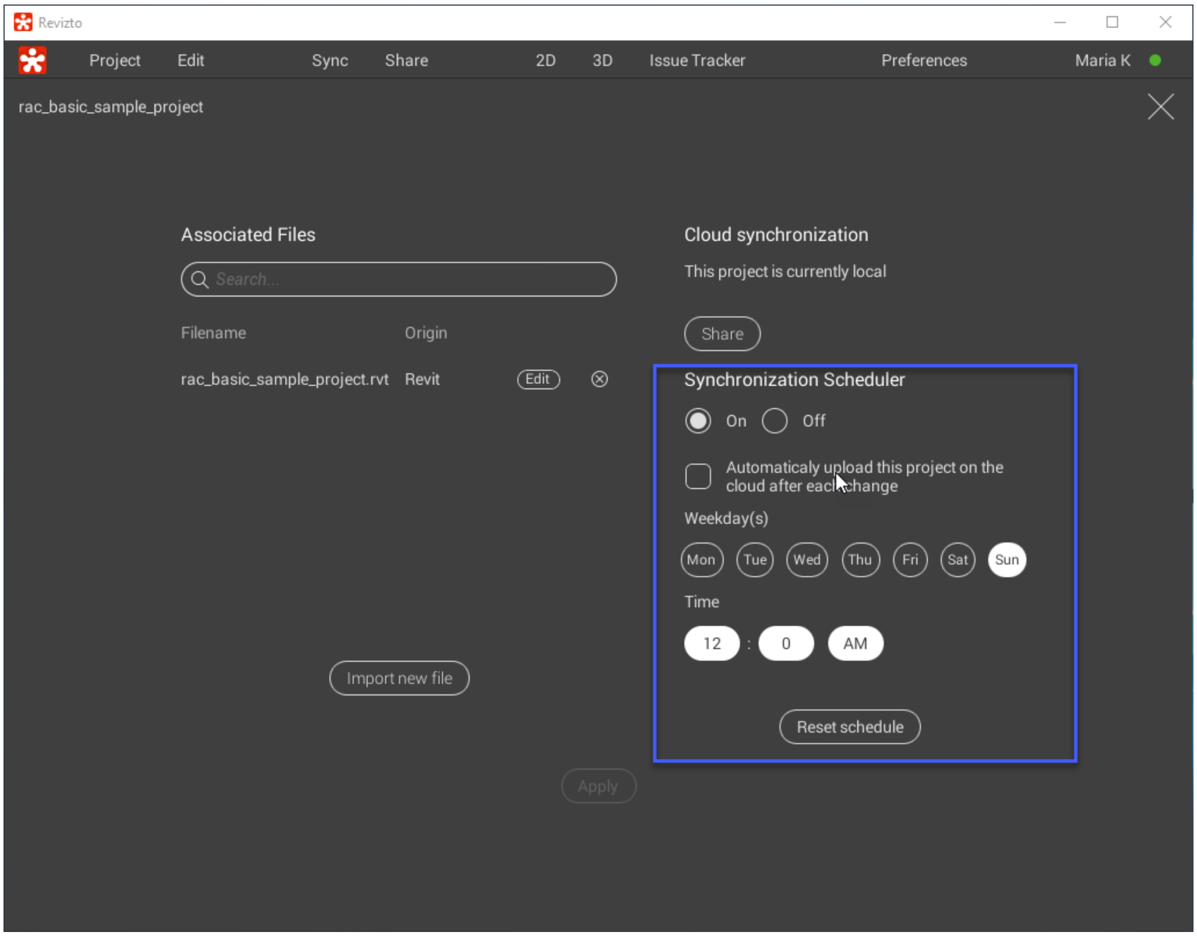
Once export settings are defined, you can also define schedule for synchronizing Revizto project with the Cloud (or with the shared location).

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 plugin; if both scheduling options are used, the latest configuration is applied.

6.1 From 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 Revisto as default. Note that if phases are exported correctly, you will be able to switch them in Revizto as well, but you default view will be based on the open open in Revit at the point of export.

Export options. Detailed

Option	Description
Export 3D model	Activate this checkbox to export the 3D model. Note that if this checkbox is deactivated all options related to 3D view become unavailable. Before launching export make sure that your source file is open in the 3D mode (3D view is selected in Revit).
Export viewpoints	Activate the checkbox to export all original Revit views. Otherwise only the currently selected view (3D) will be exported and available in Revizto.
Export levels	Activate the checkbox to export Revit levels defined in 2D. All elements outside levels are assigned to the ***No Level*** Revizto level. It is also used when levels are not defined/exported at all.
Update materials	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. 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.
Use render appearance	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. This option does not affect any lighting/material changes in Revizto editor.
Export grids	Activate the checkbox to export Revit grids. Grids are created in Revit manually and can be very useful for collaborators.
Export rooms	Activate the checkbox to export Revit rooms and use them to navigate within the resulting Revizto model.
Export phases	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. **Caution**: 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. **Note**: Phase export may affect performance of the Revizto lighting editor due to the large amount of layers coexisting in a scene.

Option	Description
Export sheets	Activate the checkbox to add sheets to Revizto model. Then click Select to choose which sheets have to be exported. Choose export option for each sheet: Image or Vector. The Image option means that the exported sheet will only have 3 zoom levels, each represented by an image. The Vector option has a smooth, more powerful zooming, yet, it may be unavailable for some files and requires more system resource. **Tip**: use filters to manage the list of sheets. Note that sheets can have similar names (not IDs though).

Sheet Export Particularities

6.2 From Navisworks

Navisworks is not designed for creating models, it combines various sources together and detects clashes. One of its sources is Revit. So, when you want to add a Navisworks source to your Revisto project, you should separately add the Revit part and exclude it from Navisworks exports (do not include geometry and sheets).

Note that when Navisworks and Revit sources are combined with the same Revisto 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.

Navisworks clashes are exported to Revisto 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.

6.3 From AutoCad/ArchiCad

Enter topic text here.

VII 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:

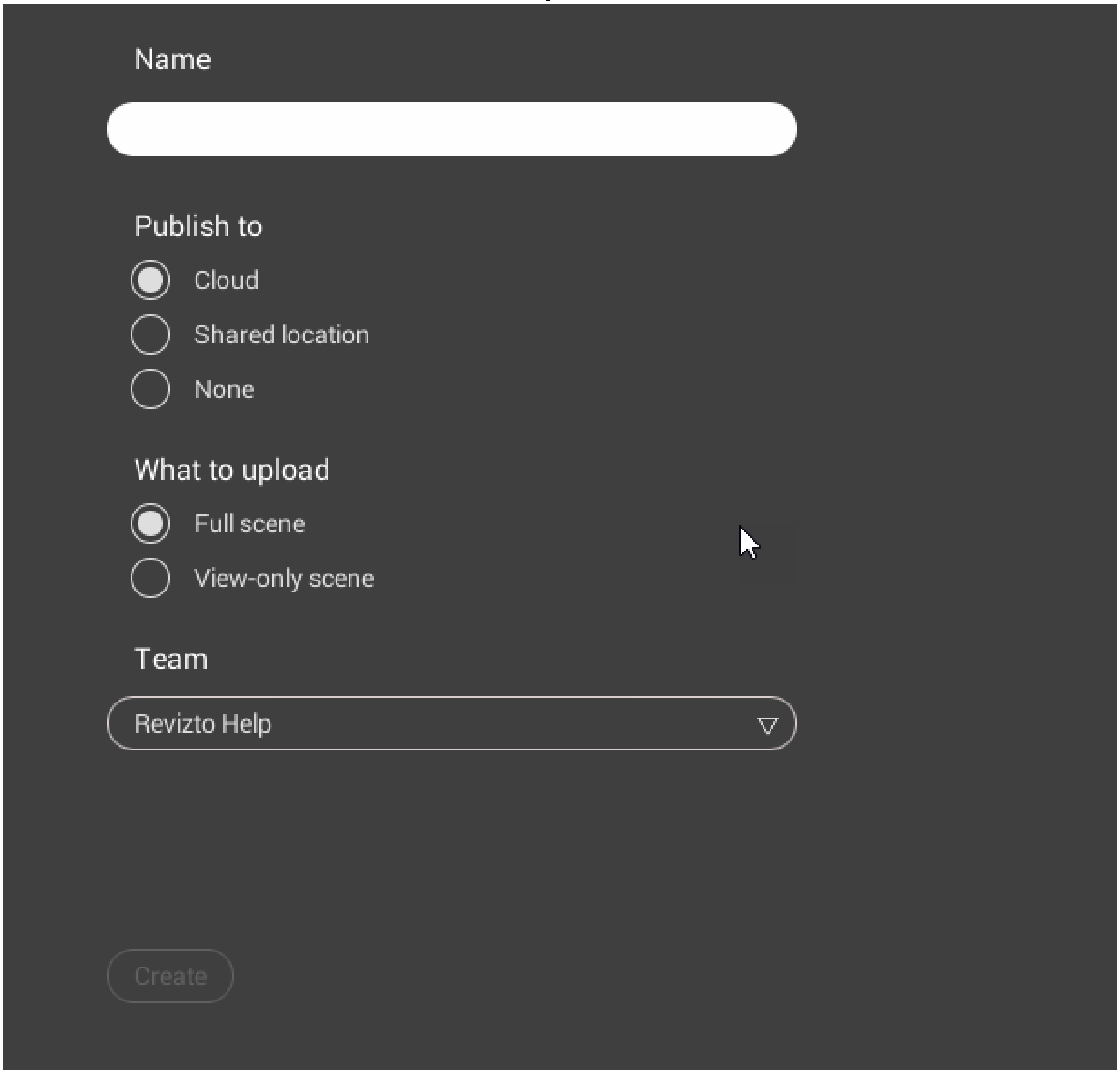
- Revizto
- Revizto plug-in in a source program

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 it will be stored. 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. 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 only 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.

Sync



3. Click the ***Create*** button.

At this point the project is considered created and information about it appears in the Web-GUI. License is taken. 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 37 in any source program and choose the ***Create New Project*** option. For more details on export, see the relevant section of this Guide 37.

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

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

- Administrate
- Edit content and collaborate
- View and collaborate

Additional levels can be created by the License Owner (the SuperAdmin).

UNDER CONSTRUCTION

7.3 Issue Management (Collaboration)

Issue LifeCycle

1. Issue is created in Revisto (or Revizto plugin in the source software) and assigned to a team member. Issue status is ***Open***.
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 it 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

From a Plugin

Issue Settings

Public/hidden

Etc.

Reviewing an Issue and Commenting on it

In Revisto

In Viewers

Via Plugin

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.

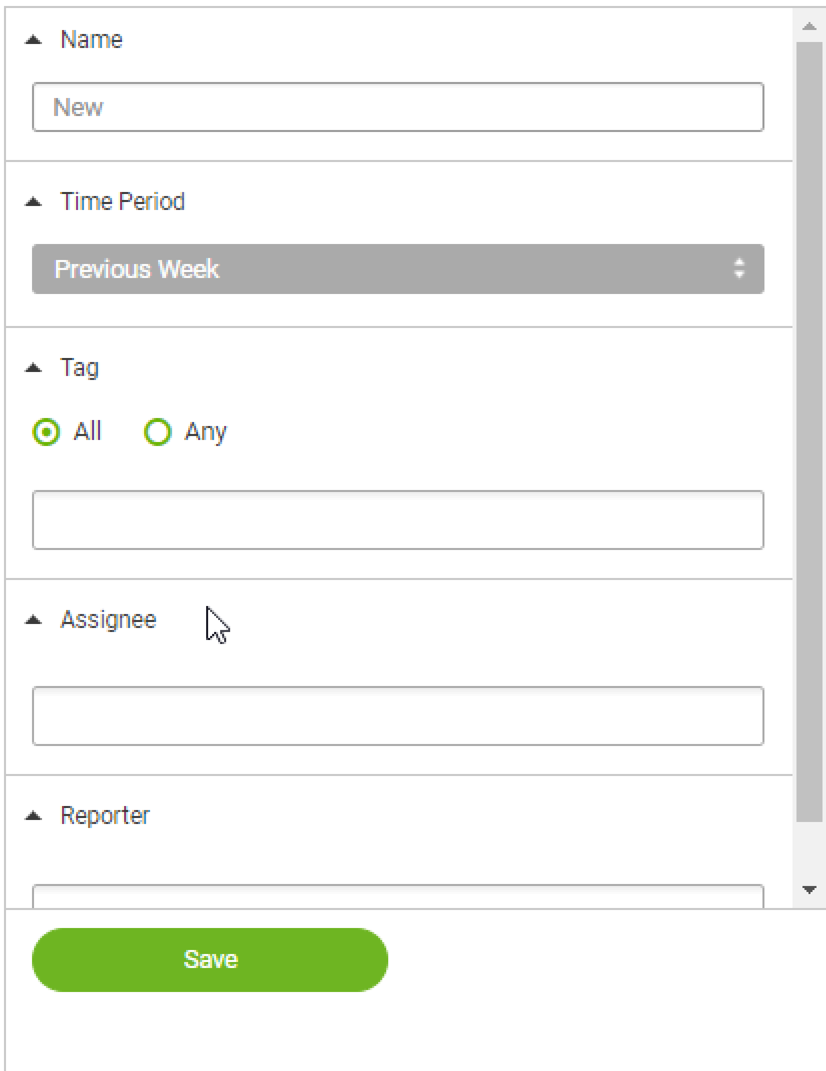
TOPIC UNDER CONSTRUCTION

7.4 Collaborator Reports

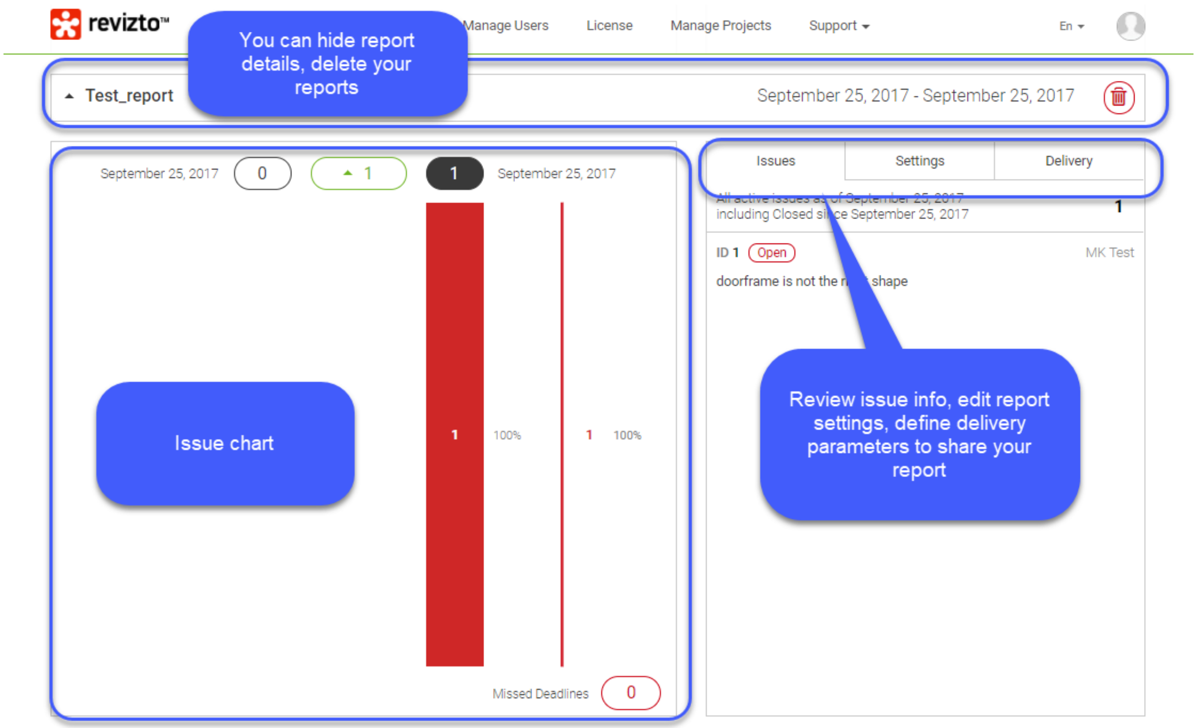
Each user can create issue reports for projects they are invited to. Reports are created in the ***Dashboard*** view of the web GUI (My ***Projects*** > ***Project page***). This view allows building customized issue reports at the project level, scheduling generation and distribution time for each.

To create a new report:

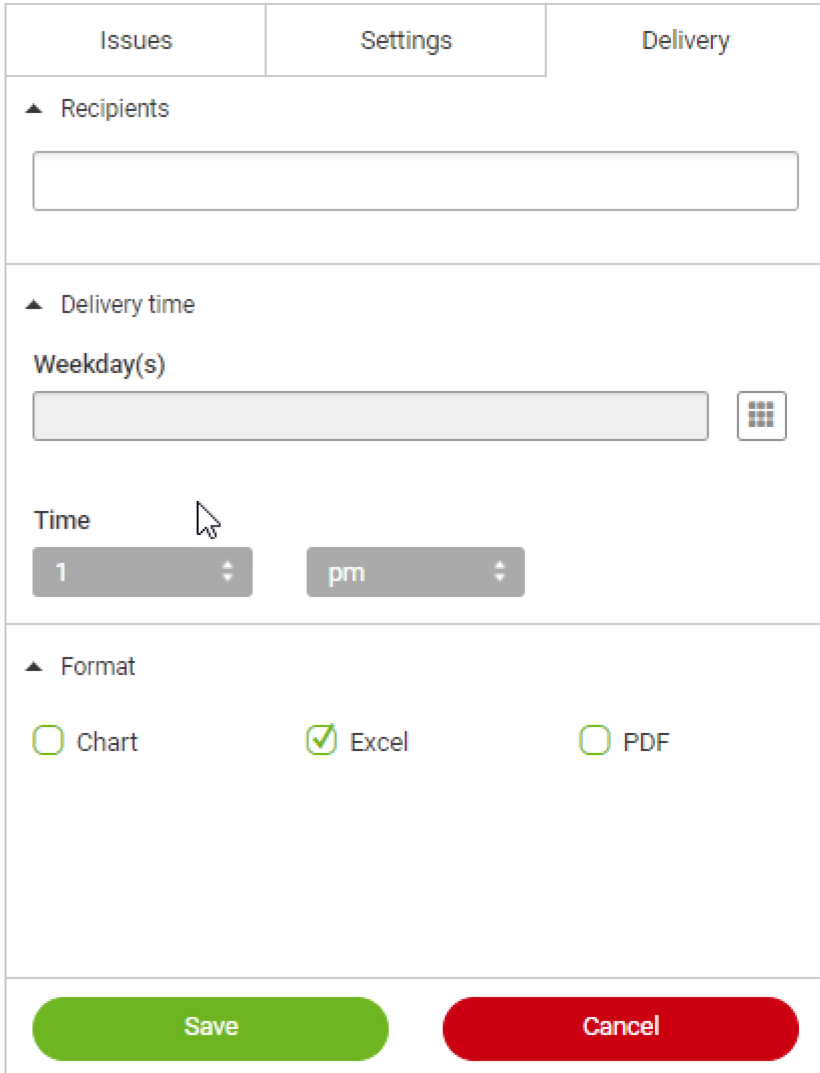
1. Click the ***Create New Report*** button.
2. Define the report settings. Make sure to correctly define reporters, assignees, tags, etc.



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.



VIII 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?

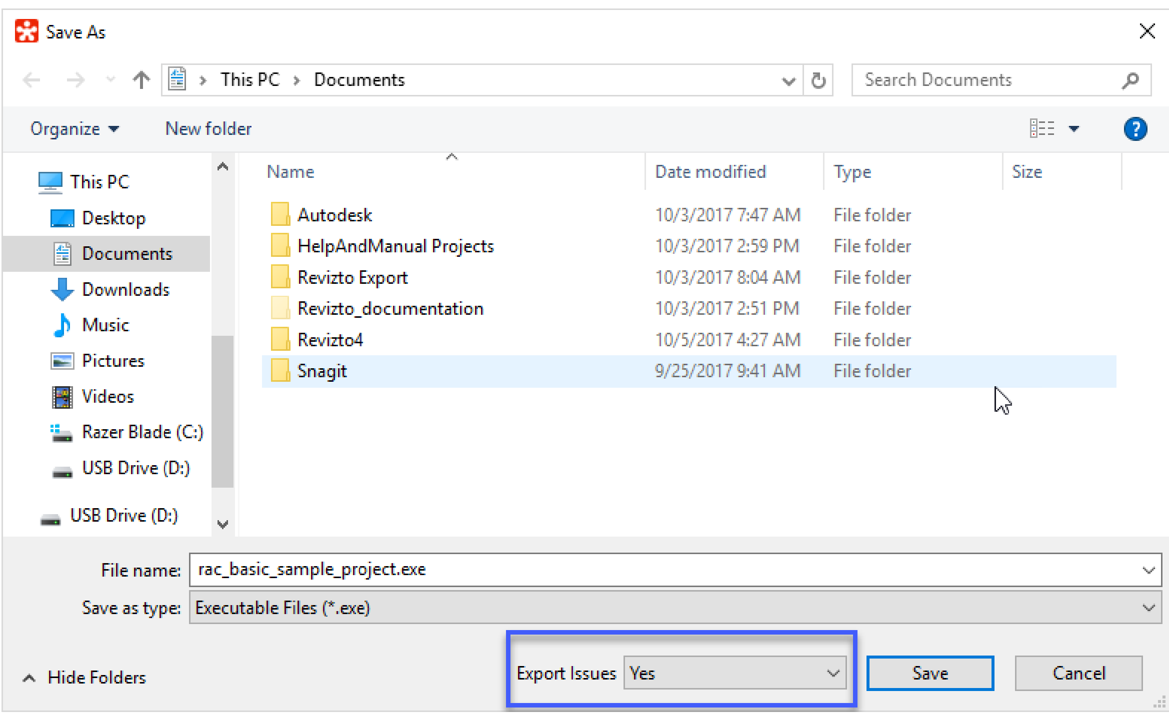
- In Revizto geographies are strictly divided in order to ensure maximum operation speed. Therefore, the Guest status (free collaboration access to members of other Revisto workspaces) is reserved to users within the same geography. To invite a collaborator from a team that has a license issues for another 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. .

IX Troubleshooting

Addressing the Support Service

Before addressing the Support Service, please, read this section and the FAQ 51. 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.

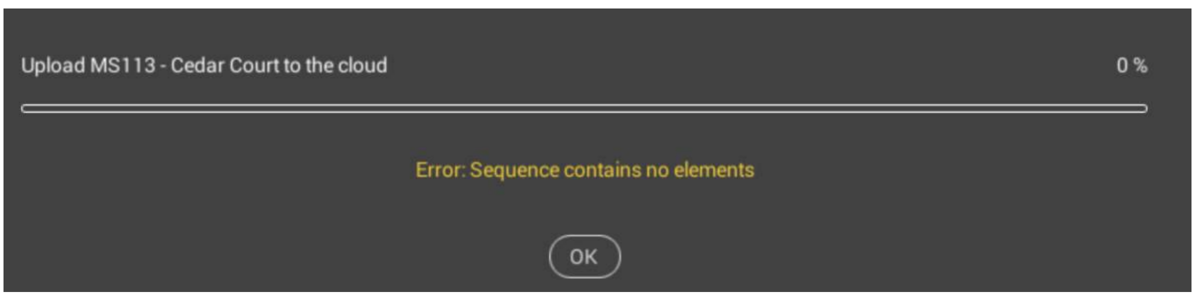
Known Issues and Solutions

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

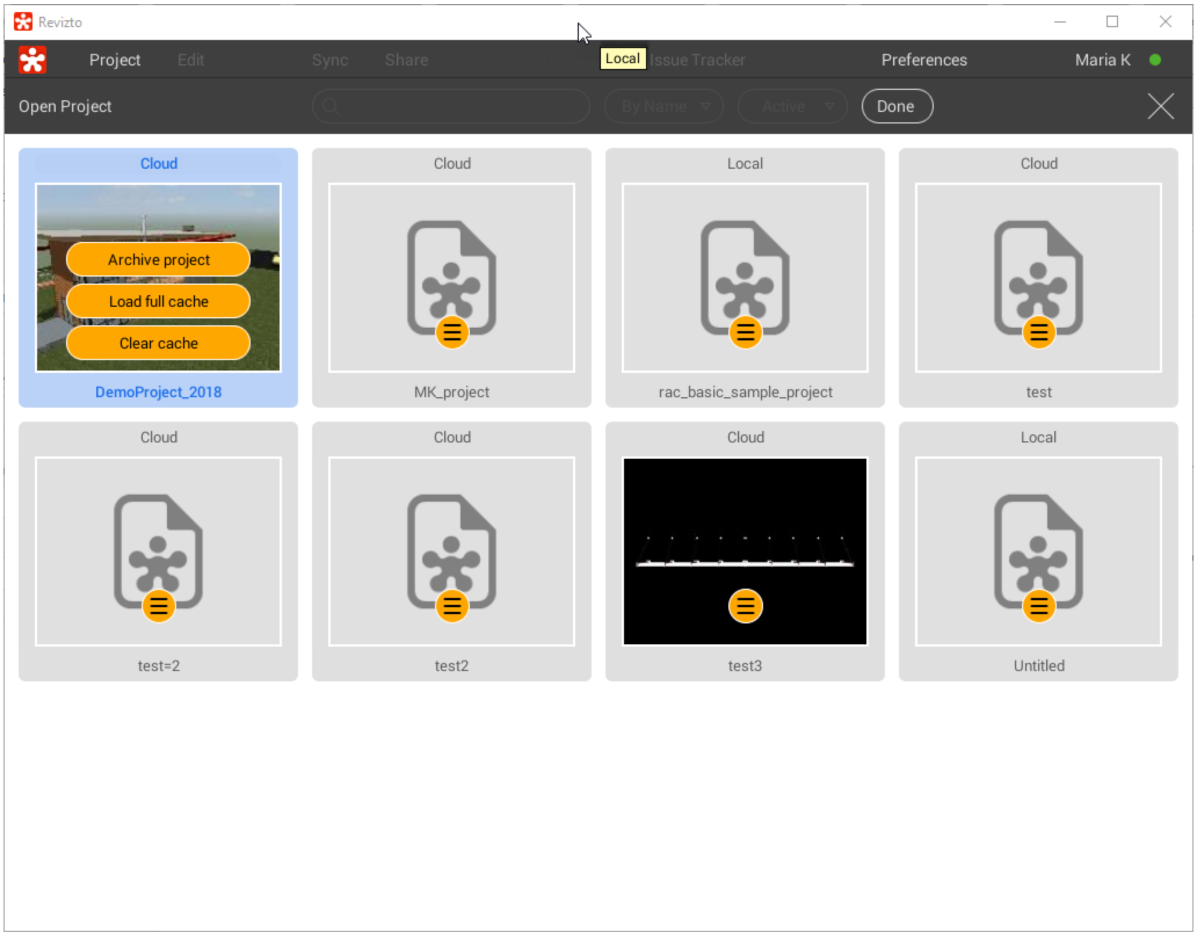
Revizto model can become corrupted due to some user actions or local software errors/failures. Than upload errors may occur (see example below).



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.