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I Introduction

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1.1 Technical requirements

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1.2 Terms and abbreviations

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

II Role Guides

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Enter topic text hrre.

2.1 License Owner

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

1. Team license activation.

To start using you Revizto license:

1. Find an email with license owner credentials. 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).



Sign in

E-mail

Password [Forgot password](#)

Region

Login



1 - Log In Page

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

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

The screenshot shows the Revizto License Info page. At the top, there's a navigation bar with links: My Projects, Manage Users, License, Manage Projects, and Support. Below the navigation bar, there's a workspace navigation bar with a user icon, 'revizto™', and the text 'Workspace navigation bar available on all pages'. The main content area is titled 'License info' and displays the following information:

- Team Name:** Revizto Help
- Your role in license:** Super Administrator
- Team:** [Progress Bar] 2 of 50
- Storage:** [Progress Bar] 2 of 100
- Region:** Europe (Ireland)
- End date:** Sep 25, 2018

On the right side, there are two large blue callout boxes with rounded corners:

- A top box points to the 'Manage' buttons for 'Change' and 'Manage' located in the 'Profile management page' section.
- A bottom box points to the 'Manage' buttons for 'Change' and 'Manage' located in the 'Team management (user account) and Storage management (projects)' section.

At the bottom of the page, there's a 'Need help?' section with a link to contact support via email.

2 - License Info Screen

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

2. Teas configuration (ceating/deleting users).

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

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

Revizto Help Users

Activity Chart License Dashboard Export to Excel

The screenshot shows the Revizto User Management interface. On the left, there is a filter sidebar titled 'Filter' with sections for 'Preset' (Select preset...), 'By Status' (All, Active, Inactive), 'By Role' (All, Super Administrator, Administrator, Content Creator, Collaborator, Guest), and 'By Tag' (Union, Intersection, Exclusion, Select tag...). On the right, there is a main table displaying user information: Name, Role, Status, and Projects Involved. Each user row has a 'Details' button (represented by a blue circle with a white arrow) next to it. The top right of the interface has buttons for '+ Add users', 'Edit tag', 'Set Role', 'Send Email', and 'Deactivate'. A large blue speech bubble on the left says 'Create a convenient user list display. Note how you can use tags for filtering'. A large blue speech bubble on the right says 'Manage user accounts on this page'. A blue speech bubble at the bottom right says 'Navigate to individual user profile'.

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

To extend user level license (create user):

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

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

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

There are five roles at the workspace level:

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

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

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

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

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

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

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

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

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

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

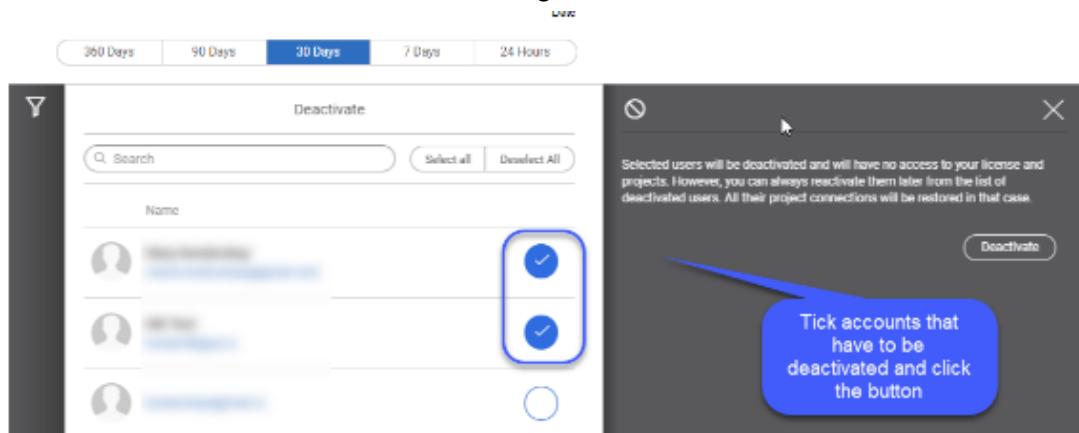
User license cancellation is called **deactivation**. This function is available to the license SuperAdmin and Administrator. Later deactivated users can be deleted.

To cancel user access (deactivate):

1. Click **Deactivate** at the top of the user list.

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

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



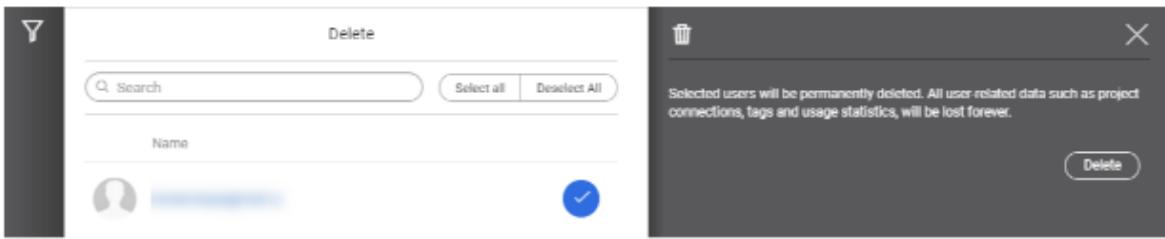
Deactivated accounts can be reactivated any time with the previous access level and project memberships. However, note that project ownership is not restored. At deactivation project ownership is automatically assigned to the SuperAdmin and reactivation does not reverse it. It is recommended to reassign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

To delete a user:

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

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

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 hight 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-GUs support other group actions (emailing, tagging, access level change). These are implemented in a similar way with similar search and filtration options.

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

Use these buttons to access group modification functionality

3. Project license management.

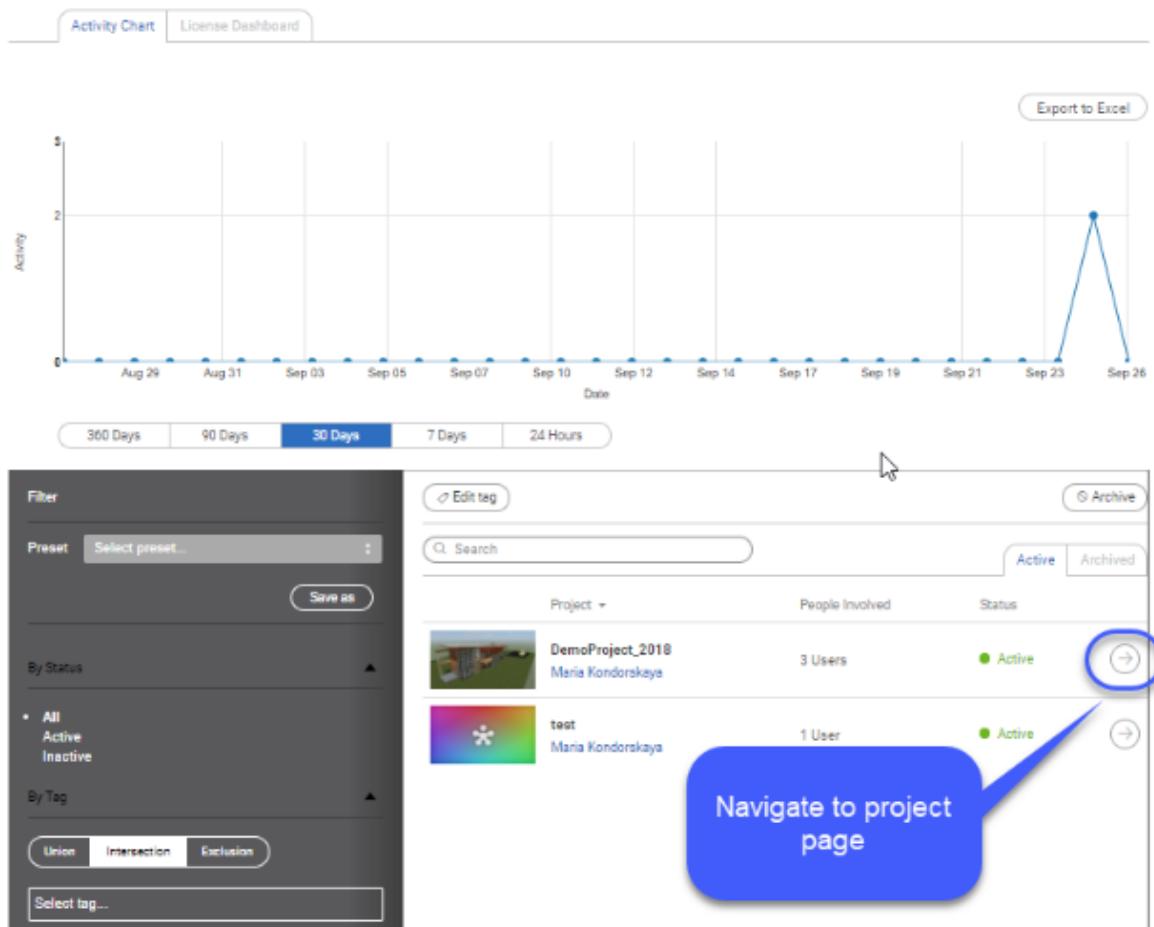
Super Admin, Administrator and Content Creator can create new projects within the team licenses using locally installed instances of Revizto (project creator is considered its Owner).

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

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

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

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



To archive a project/s:

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

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

nevisto.

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 projeca pagh consists of whree views:

- Pfoject Info
- Private Sharing
- Daahboard

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 nea Rzvizto model
- Create and assign tags to the project
- View a summarized project darhboard

The screenshot shows the 'Project info' tab selected in the navigation bar. The main content area displays project details:

- Title:** DemoProject_2018 (with a 'Change' button)
- Owner:** Maria Kondorskaya (with a 'Change' button)
- License:** Revizto Help (with a 'Change' button)
- Created:** September 25, 2017 (with a 'Change' button)
- Updated:** September 25, 2017

A blue callout bubble points to the text "Scroll down for the dashboard". Below the project info, there is a section for "Tags" with two tags: "demo" and "new_tag".

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 workspacm web GUI.
2. Click the ***Manage Access Levels*** buttons. The ***Mvnage Access Lcvels*** 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 title	<input type="checkbox"/> Rename and remove tags
<input checked="" type="checkbox"/> Append 2D	<input type="checkbox"/> Change priority	<input type="checkbox"/> Edit issue markup
<input checked="" type="checkbox"/> Add/Edit viewpoints	<input type="checkbox"/> Edit issue deadline	<input type="checkbox"/> Delete issue
<input checked="" type="checkbox"/> Add/Edit videotracks	<input type="checkbox"/> Reassign issue	<input type="checkbox"/> Manage project rights / invite people to the project
<input checked="" type="checkbox"/> View public issues	<input type="checkbox"/> Public on/off	<input checked="" type="checkbox"/> Revert project to older revision
<input checked="" type="checkbox"/> Create issue		
<input checked="" type="checkbox"/> Comment issue		

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

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

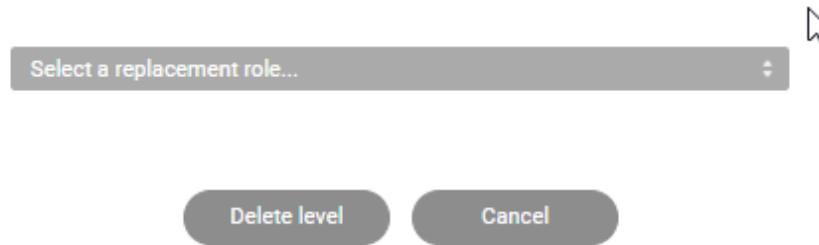
Buttons at the bottom: Save, Save as new level, Cancel, Delete this level.

3. To edit an existing level:
 - a. Tick rights that you want to assign to the role, if you want to extend the access level
 - b. Untick available rights to revoke them and limit the access level 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.

The screenshot shows a list of user rights in Revizto:

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

A blue callout bubble with the text "Edit user rights at the project level" points to the "Edit user rights" button in the top right corner of the interface.

4. ☐ License Monitoring.

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

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

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

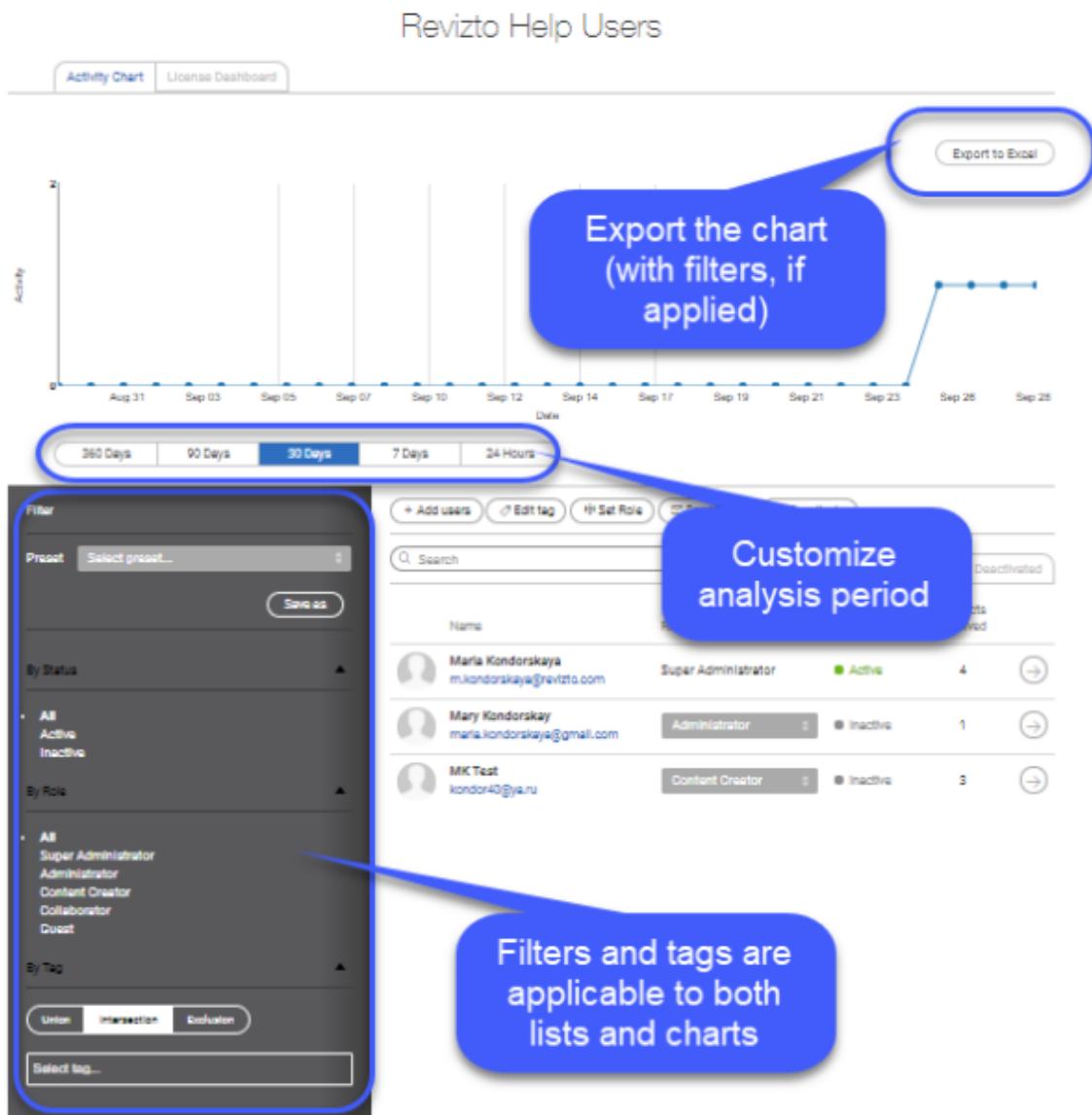
An Excel version contains full user data (name, email, role, last activity time, total duration in the Active status, tags, number of projects and their names). The chart is also included.

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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Enter topic text here.

2.3 Content author

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Enter topic text here.

2.4 Reviewer

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Enter topic text here.

III Licensing. Workspace Configuration and Management

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

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To start using your Revizto license:

1. Find an email with license owner credentials. 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).



Sign in

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

3 - Log In Page

3. Go to the **Licence 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).

The screenshot shows the Revizto License Info page. At the top, there's a navigation bar with links: My Projects, Manage Users, License, Manage Projects, and Support. Below the navigation bar, there's a workspace navigation bar with the Revizto logo, the user's name (m.kondorskaya), and an email address (m.kondorskaya@revizto.com). The main content area is titled "License info". It displays the following information:

- Team Name:** Revizto Help
- Your role in license:** Super Administrator
- Team:** [Progress Bar]
- Storage:** [Progress Bar]
- Region:** Europe (Ireland)
- End date:** Sep 25, 2018

Below this, there's a section for "License Administrators" with a user profile for Maria Kondorskaya (m.kondorskaya@revizto.com). At the bottom, there's a "Need help?" section with a note about contacting support.

Annotations with blue rounded rectangles and arrows point to specific parts of the page:

- A callout points to the workspace navigation bar with the text: "Workspace navigation bar available on all pages".
- A callout points to the "Change" buttons in the "Manage" sections with the text: "Navigate to Profile management page (SuperAdmin account settings), edit Team name".
- A callout points to the "Manage" buttons in the "Manage" sections with the text: "Navigate to Team management (user account) and Storage management (projects)".

4 - License Info Screen

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

3.2 Managing Users

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

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

Revizto Help Users

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

Manage user accounts on this page

Navigate to individual user profile

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

To extend user level license (create user):

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

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

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

There are five roles at the workspace level:

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

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

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

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

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

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

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

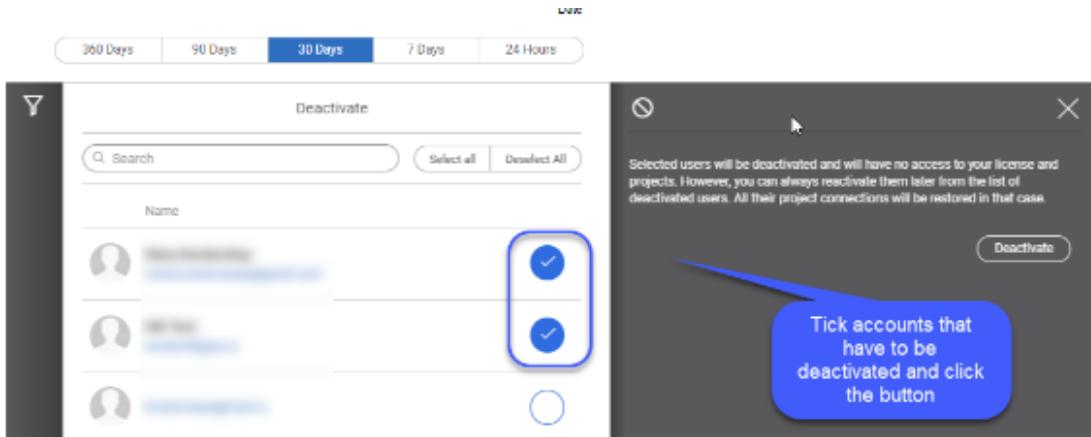
Warning: Neither the License Owner (SuperAdmin) nor the Administrator can edit user credentials. Therefore, make sure to timely deactivate users when people leave the company. Also make sure to duly transfer the License Ownership if the relevant employee leaves the company.

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

To cancel usrr access (deactivate):

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

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



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

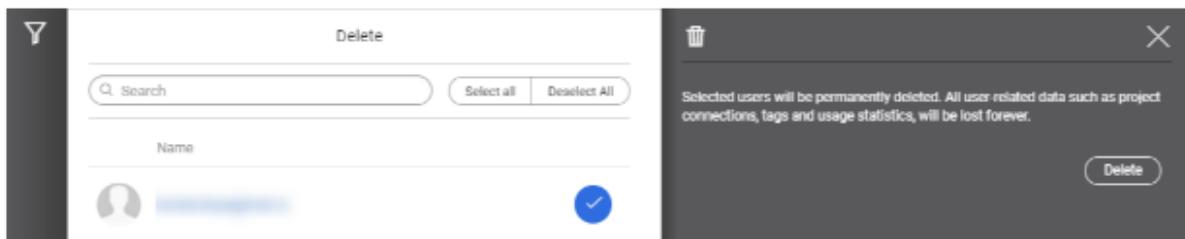
To delete a user:

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

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

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 **Deletee** button at the right side. Note that this action is irrevocable.



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

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

Group Operations

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

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

Use these buttons to access group modification functionality

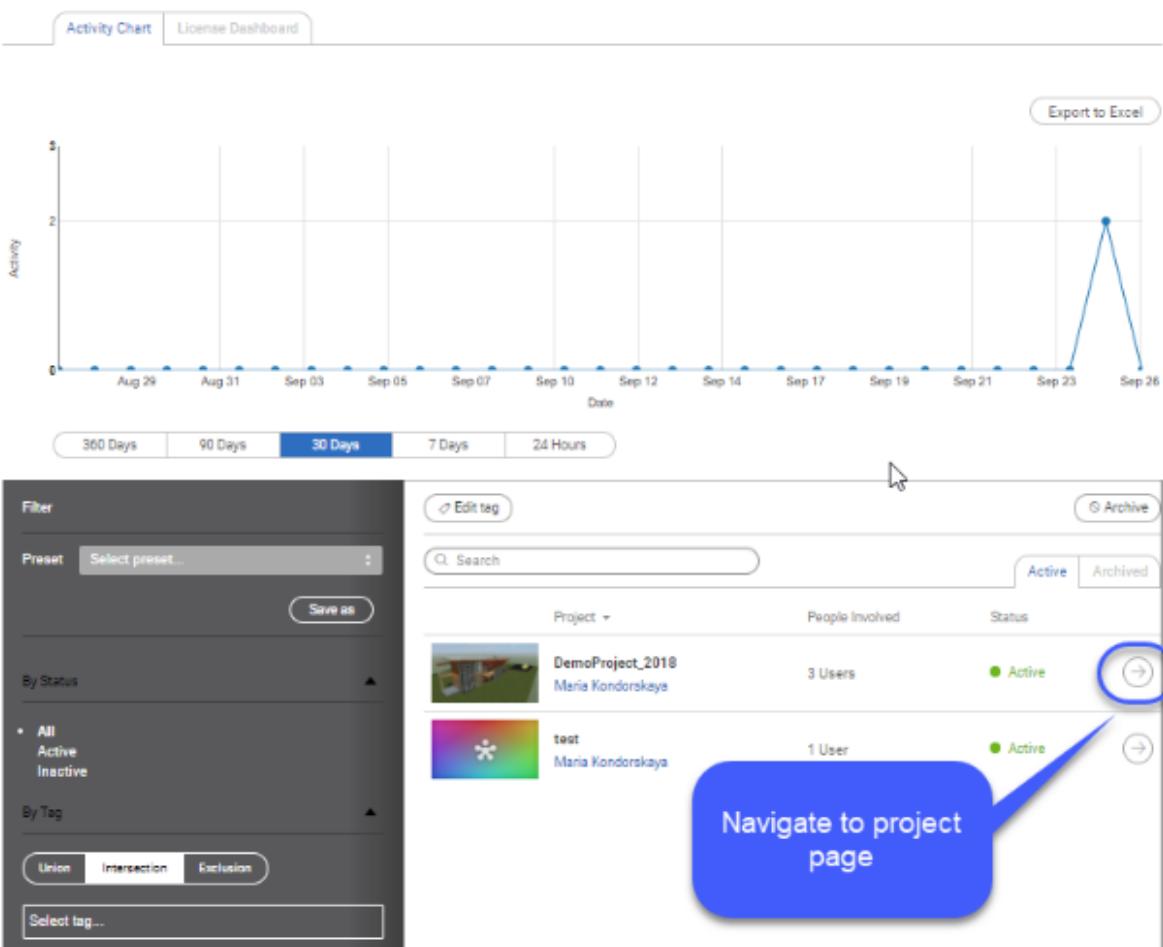
3.3 Project Management

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Super Admin, Administratir and Cfntent 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** page of the workspace web GUI (available to the License owner and Administrators) with an **Active** or **Inactive** status; a project is licensed if 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 the page of any of its members (users invited to the project).



To archive a project/s:

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

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

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

Scroll down for the dashboard

Private Sharing

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

Note: You can invite a new user to the project without creating a workspace-level account before. Then the system creates a workspace-level collaborator account automatically. Yet,

deleting a user at the project level does not mean deleting a workspace level account. You have to Deactivate an account at the workspace level to completely cancel user access to the team workspace.

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

The screenshot shows the 'Private Sharing' view for a project titled 'DemoProject_2018'. At the top, there are three tabs: 'Project info', 'Private Sharing' (which is selected), and 'Dashboard'. Below the tabs, there's a section for inviting users with a text input field 'Enter e-mail to invite a user' and a green 'Invite' button. Further down, there's a 'Set Access Level' dropdown currently set to 'View and collaborate', a 'Manage Access Levels' button with a cursor hovering over it, and a 'Project team' section listing three users with their names, rights ('Owner', 'Administristrate', 'View and collaborate'), and edit/delete icons.

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 wUI.
2. Click the **Manage Access Levels** buttons. The **Manage Access Levels** view opens.

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

Manage Access Levels

Access level: Edit content and collaborate

Edit name: Edit content and collaborate

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

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

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

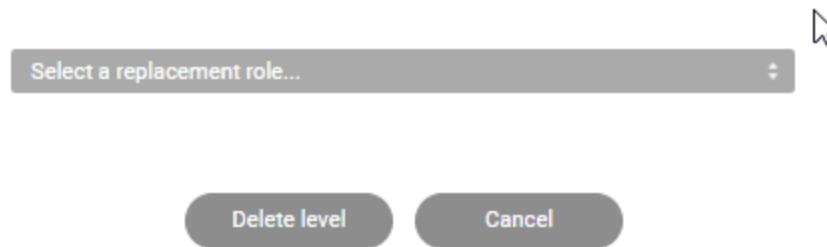
Buttons at the bottom: Save, Save as new level, Cancel, Delete this level

3. To edit an existing level:
 - a. Tick rights that you want to assign to the role, if you want to extend the access level
 - b. Untick available rights to revoke them and limit the access level 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.

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

3.4 License Monitoring

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

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

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

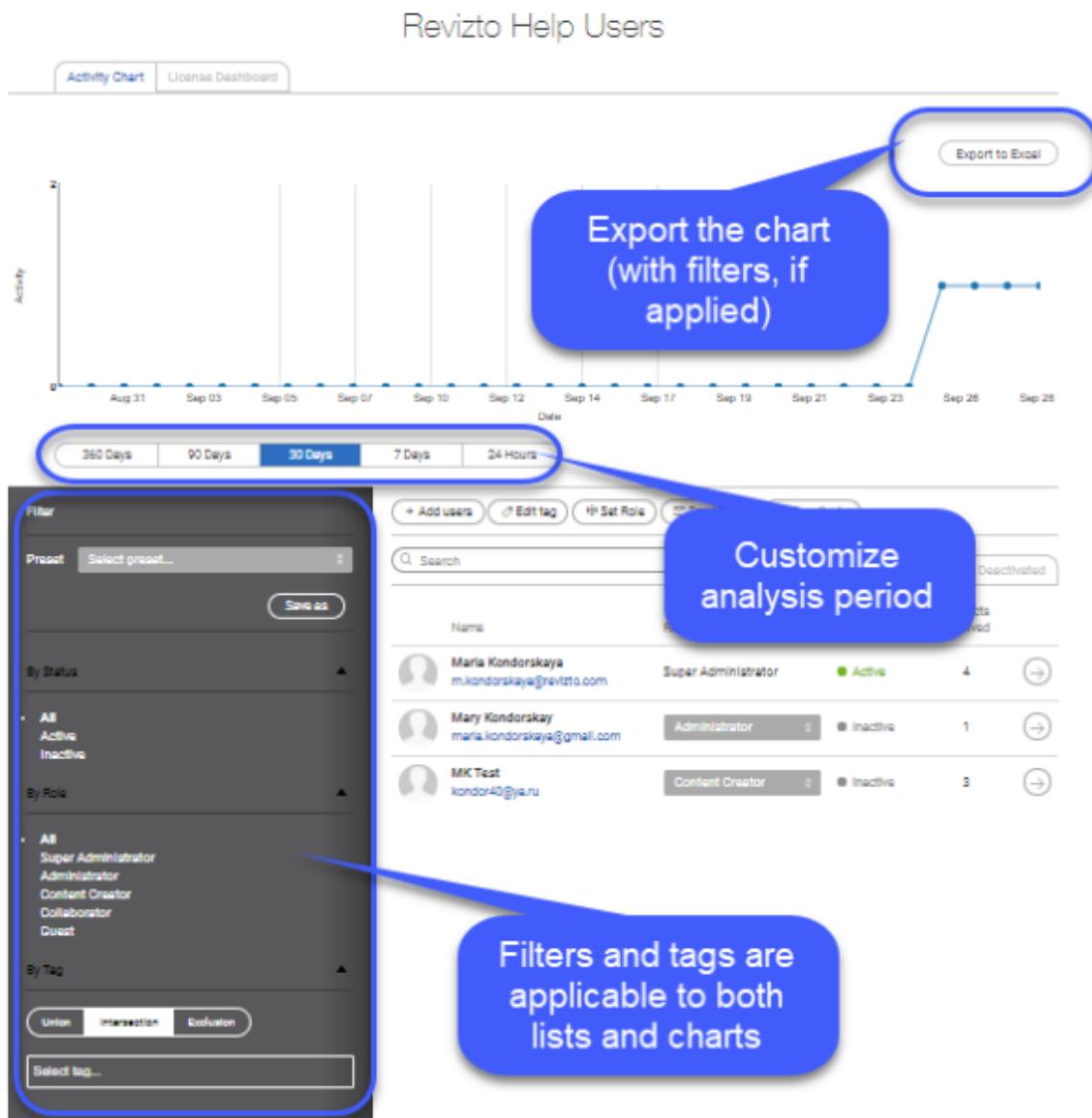
An Excel version contains full user data (name, email, role, last activity time, total duration in the Active status, tags, number of projects and their names). The chart is also included.

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

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

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

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



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

3.5 Interface Tips

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Using Tags

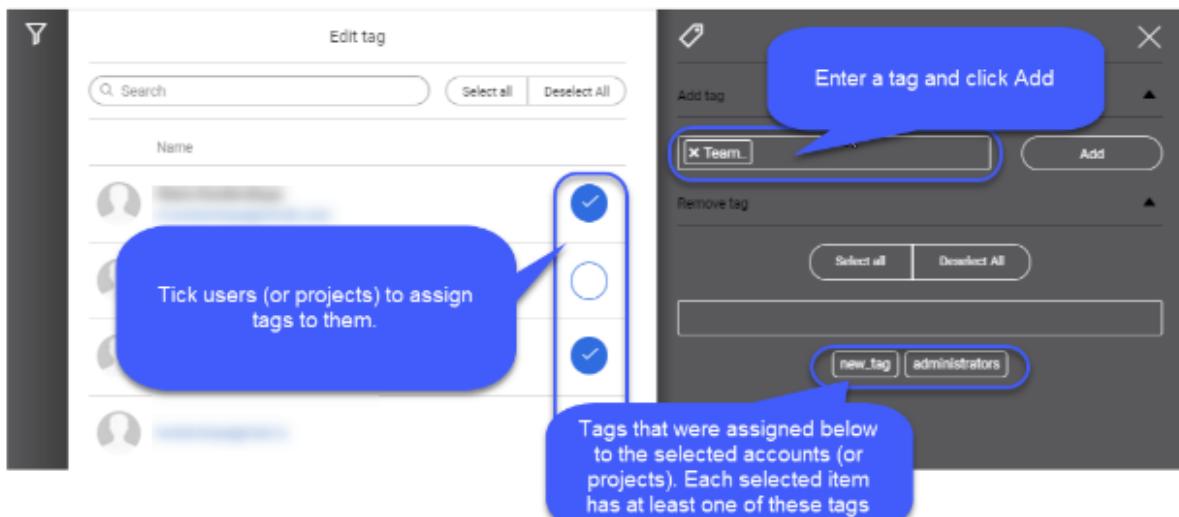
You can create and assign an unlimited number of tags to user accounts and projects. Tags provide an additional filtration options in large environments.

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

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

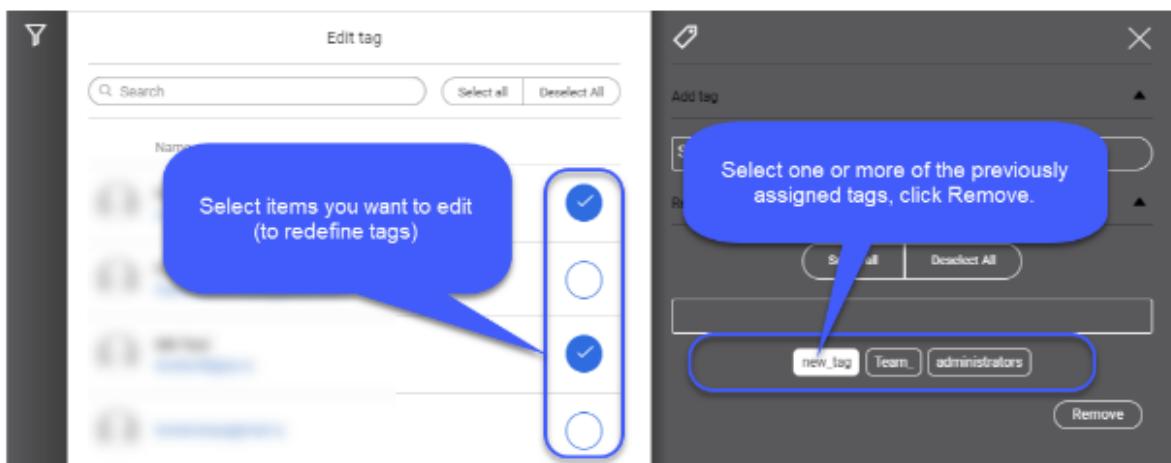
To create a tag from a general view:

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



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

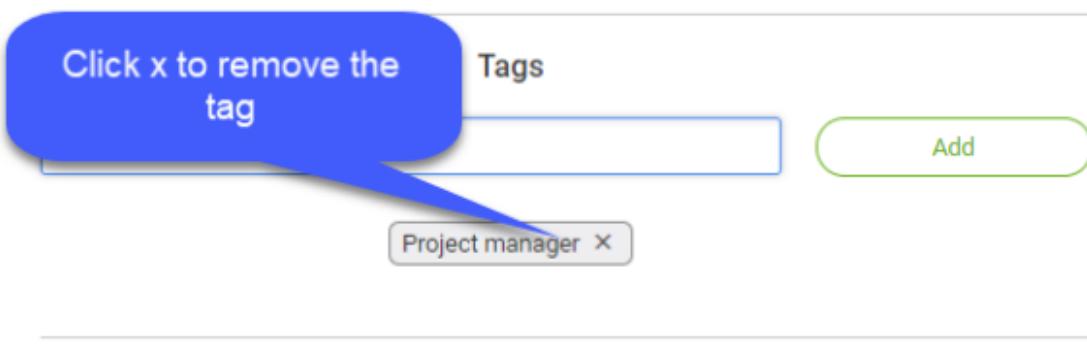
To remove tags, use the same window (see the image below).



To tag an individual project/account:

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

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

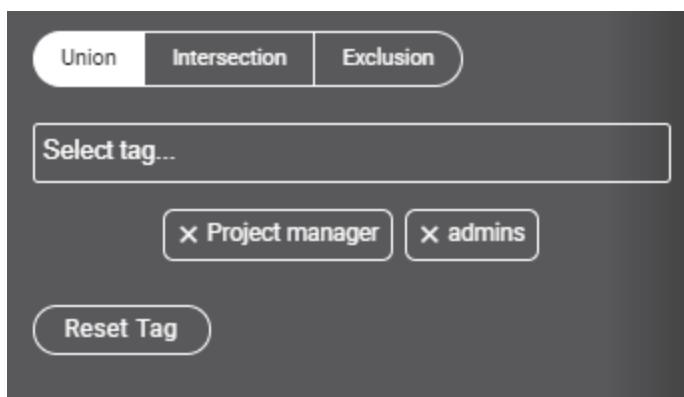


Using tags for filtration

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

To filter items by tags:

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



Creating Filtration Presets

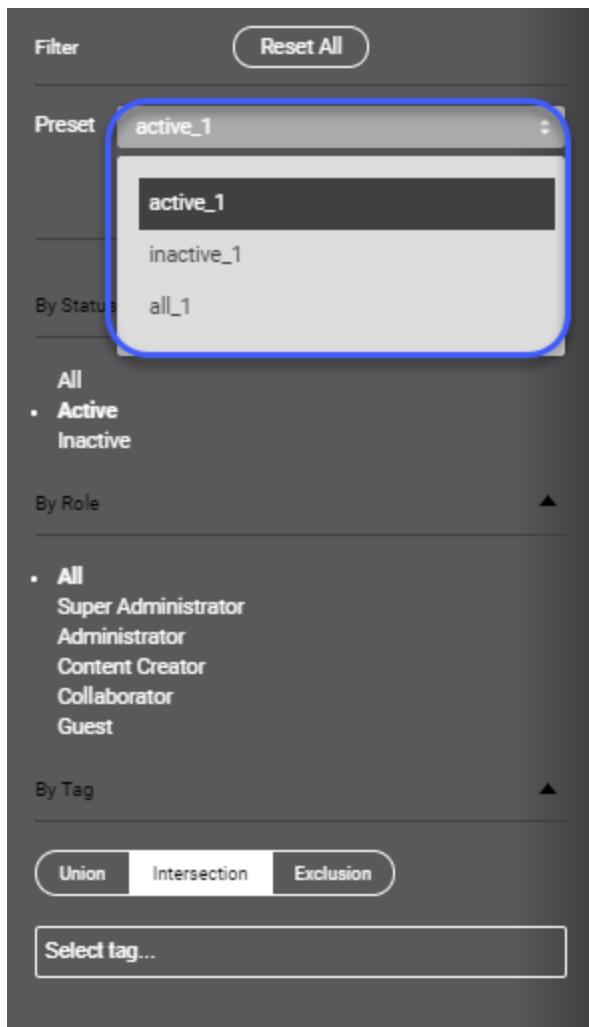
Filtration presets allow administrators to quickly filter lists of licensed items (users and projects) and to build several [charts](#) with different settings for comparison. E.g.: a 30-day

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

To create a preset:

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

Your filter is saved and becomes available for selection.



IV Exporting Files to Revizto

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