



Bricsys®

Bricsys 24/7





Contents

| | | |
|-------|---|----|
| 1. | Welcome | 5 |
| 1.1 | About this guide | 5 |
| 1.1.1 | Introduction | 5 |
| 1.1.2 | About the product | 5 |
| 1.1.3 | Notes and tips | 5 |
| 1.2 | References | 5 |
| 1.3 | Terms of use | 5 |
| 2. | Setup | 6 |
| 2.1 | System requirements | 6 |
| 2.2 | Account | 6 |
| 2.2.1 | To be added/invited to a project by a project administrator | 6 |
| 2.2.2 | Request a trial account | 6 |
| 2.2.3 | Purchasing a subscription | 7 |
| 2.3 | Log in and select your preferred language | 7 |
| 2.4 | Edit your profile | 7 |
| 2.5 | Multi-factor authentication | 9 |
| 2.5.1 | About | 9 |
| 2.5.2 | Downloading an authenticator app | 10 |
| 2.5.3 | Multi-factor authentication set up | 10 |
| 2.5.4 | Activate MFA requirement on a project | 11 |
| 2.6 | Log off | 12 |
| 2.7 | Switch between the old and new user interface | 12 |
| 3. | Navigation | 13 |
| 3.1 | Search for a project | 13 |
| 3.2 | Select a project | 13 |
| 3.3 | Main window | 13 |
| 3.3.1 | Project bar | 14 |
| 3.3.2 | Toolbar | 14 |
| 3.3.3 | Tool menu | 15 |
| 3.3.4 | Content pane | 15 |
| 3.3.5 | View buttons | 15 |
| 3.4 | Search in a project | 16 |
| 3.4.1 | Perform a quick search in a project | 16 |
| 3.4.2 | Perform an advanced search in a project | 16 |
| 3.5 | Keyboard shortcut overview | 18 |
| 4. | Daily operation | 19 |
| 4.1 | Communication | 19 |
| 4.1.1 | Send a notification | 19 |
| 4.1.2 | Notes | 19 |
| 4.1.3 | Messages | 20 |
| 4.1.4 | Add recipients | 23 |
| 4.2 | Consult document details | 23 |
| 4.3 | Bricsys 24/7 Viewer | 24 |
| 4.3.1 | Open the Bricsys 24/7 Viewer | 24 |
| 4.3.2 | Navigation in Bricsys 24/7 Viewer | 24 |
| 4.3.3 | Annotations | 25 |
| 4.4 | Tasks | 26 |
| 4.4.1 | Consult the number of open tasks that are assigned to you | 26 |



Contents

| | | |
|--------|---|----|
| 4.4.2 | You can consult your tasks in: | 27 |
| 4.4.3 | Change your communication preferences in the profile settings | 27 |
| 5. | Tools | 28 |
| 5.1 | Files | 28 |
| 5.1.1 | Change the view of the folders | 28 |
| 5.1.2 | Documents | 28 |
| 5.1.3 | Binders | 42 |
| 5.1.4 | BIM files | 43 |
| 5.2 | Address Book | 46 |
| 5.2.1 | Create a contact | 46 |
| 5.2.2 | Import a contact from an address book | 47 |
| 5.2.3 | Import contacts from a CSV file | 47 |
| 5.2.4 | Edit a contact | 48 |
| 5.2.5 | Transfer a contact | 48 |
| 5.2.6 | Create an organization | 49 |
| 5.2.7 | Import an organization | 49 |
| 5.2.8 | Edit an organization | 49 |
| 5.2.9 | Transfer an organization | 50 |
| 5.2.10 | Download a vCard (electronic business card) | 50 |
| 5.3 | Tasks | 50 |
| 5.3.1 | Create a task | 51 |
| 5.3.2 | Consult, submit, or accept a task | 51 |
| 5.3.3 | Reassign a project member to a task | 52 |
| 5.3.4 | Export open or completed tasks | 52 |
| 5.4 | Forms | 52 |
| 5.5 | Reports | 53 |
| 5.5.1 | Overview of tasks by role | 53 |
| 5.5.2 | Overview of tasks by user | 54 |
| 5.5.3 | Overview of tasks by workflow | 54 |
| 5.5.4 | Export task statuses | 55 |
| 5.5.5 | Export a report by folder | 55 |
| 5.6 | Work with relations | 55 |
| 5.7 | Administration | 56 |
| 5.7.1 | Overview | 56 |
| 5.7.2 | Project settings | 57 |
| 5.7.3 | Project setup | 58 |
| 5.7.4 | Users | 68 |
| 5.7.5 | Roles | 71 |
| 5.7.6 | Administrators | 75 |
| 5.7.7 | App access | 77 |
| 5.7.8 | Form entries access | 77 |
| 5.7.9 | Audit report | 78 |
| 5.7.10 | Recycle bin | 78 |
| 5.8 | Bricsys 24/7 Transfer Tool | 79 |
| 5.8.1 | Transfer folder structures | 79 |
| 5.8.2 | Transfer documents | 80 |
| 5.8.3 | Open, edit and revise a document | 83 |
| 5.8.4 | Synchronize folders | 83 |
| 5.8.5 | Run synchs from the Command Prompt | 85 |



Contents

| | | |
|--------|---|-----|
| 5.8.6 | How to configure the location for the temporary folder for the Bricsys 24/7 Transfer Tool | 87 |
| 5.9 | Bricsys 24/7 mobile app | 87 |
| 5.9.1 | Projects list | 88 |
| 5.9.2 | Documents | 88 |
| 5.9.3 | Tasks | 91 |
| 5.9.4 | Contacts | 92 |
| 5.9.5 | Profile | 92 |
| 5.10 | BricsCAD Pro | 92 |
| 5.11 | Other apps | 92 |
| 6. | Project Management | 94 |
| 6.1 | Set up a project | 94 |
| 6.1.1 | Create a new project | 94 |
| 6.1.2 | Edit the project settings | 94 |
| 6.1.3 | Create the folder structure | 97 |
| 6.1.4 | Define roles | 99 |
| 6.1.5 | Update access rights | 99 |
| 6.1.6 | Add users and send an invitation mail | 99 |
| 6.1.7 | Copy a project | 99 |
| 6.2 | Manage a project | 100 |
| 6.2.1 | Set the project size limit | 100 |
| 6.2.2 | Delete a project | 101 |
| 6.2.3 | Restore a deleted project | 101 |
| 6.2.4 | Permanently delete a project | 102 |
| 6.3 | Set up a workflow | 102 |
| 6.3.1 | Overview | 102 |
| 6.3.2 | Create a workflow | 103 |
| 6.3.3 | Navigation in Bricsys 24/7 Workflow Viewer | 103 |
| 6.3.4 | Design a workflow | 105 |
| 6.3.5 | Consult a workflow | 108 |
| 6.3.6 | Edit a workflow | 109 |
| 6.3.7 | Edit the workflow info | 109 |
| 6.3.8 | Release a workflow | 110 |
| 6.3.9 | Change the workflow status to obsolete | 110 |
| 6.3.10 | Copy a workflow | 110 |
| 6.3.11 | Move a workflow | 111 |
| 6.3.12 | Add a workflow to a binder | 111 |
| 6.3.13 | Delete a workflow | 113 |
| 6.3.14 | Cancel a workflow | 113 |
| 6.4 | Set up metadata | 113 |
| 6.4.1 | Create a form | 114 |
| 6.4.2 | Add a form entry to a form | 115 |
| 6.4.3 | Work with reservations | 115 |
| 6.5 | Multi-factor authentication | 116 |
| 6.5.1 | About | 116 |
| 6.5.2 | Downloading an authenticator app | 116 |
| 6.5.3 | Multi-factor authentication set up | 116 |
| 6.5.4 | Activate MFA requirement on a project | 117 |
| 7. | Glossary | 119 |



Contents

| | | |
|-------|---------------------------------|-----|
| 8. | Important Information | 120 |
| 8.1 | Legal disclaimer | 120 |
| 8.1.1 | Disclaimer notice | 120 |
| 8.1.2 | Intellectual property ownership | 120 |
| 8.1.3 | Trademarks | 120 |
| 8.2 | Privacy | 120 |
| 8.2.1 | Processing of personal data | 120 |
| 8.2.2 | Use of cookies | 120 |
| 8.3 | Cybersecurity incidents | 121 |



1. Welcome

1.1 About this guide

1.1.1 Introduction

This guide informs you how to operate Bricsys 24/7.

1.1.2 About the product

Bricsys 24/7 is a cloud-based common data environment (CDE) for document management and workflow automation.

The interface is available in different languages, including Dutch, Chinese, English, French, German, Hebrew, Italian, Japanese, Norwegian, Polish, Portuguese, Romanian, Russian, Slovenian and Spanish.

1.1.3 Notes and tips

There are 3 levels of advisory statements that may be used in this guide. In descending order of importance, they are:

Important: Gives important information about the described subject.

Note: Gives additional information about the described subject.

Tip: Gives extra advice about the described subject.

1.2 References

This article provides references to other information you may need to use Bricsys 24/7:

- [Bricsys Blog](#)
- [Official Bricsys YouTube channel](#)

1.3 Terms of use

Before you can use Bricsys 24/7, you must agree with the [terms of use](#).



2. Setup

2.1 System requirements

Recommended computer environment to run Bricsys 24/7.

Operating system:

- Windows, Mac, or Linux

Browser:

- Chrome, Firefox, Internet Explorer 11, Microsoft Edge, or Safari 7 (and higher) for macOS

Hardware:

- Active Internet connection

2.2 Account

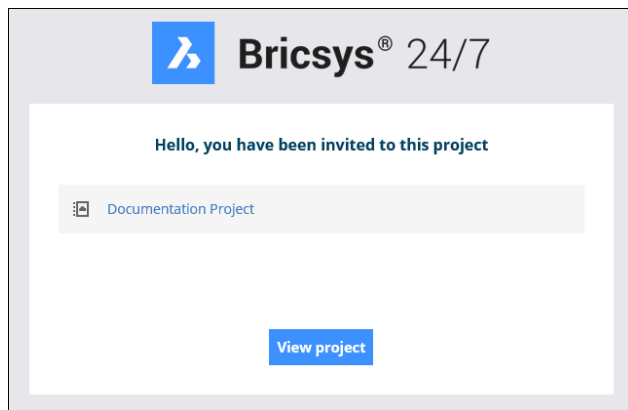
All users have their own Bricsys 24/7 account. Registering an account on the Bricsys platform does not automatically create an account for Bricsys 24/7.

There are three ways to join Bricsys 24/7:

- 1 To be added/invited to a project by a project administrator.
- 2 To request a trial account.
- 3 To purchase a subscription.

2.2.1 To be added/invited to a project by a project administrator

An account can be created by a project administrator. A new user receives an email with an invitation to a Bricsys 24/7 project, and login instructions.



Note: In Bricsys 24/7, a customer can, without additional cost, add an unlimited number of users to a project to improve collaboration and traceability.

2.2.2 Request a trial account

- 1 Go to <https://www.bricsys.com/247>
- 2 Select **Try Bricsys 24/7 for free**



- 3 Complete the registration

2.2.3 Purchasing a subscription

- 1 Go to <https://www.bricsys.com/247>
- 2 Select **Login on 247**
- 3 Complete the registration

2.3 Log in and select your preferred language

- 1 Browse to <https://my.bricsys247.com/app/>.

Result: The login page appears.

- 2 Enter your email address and password.

Tip: Tick the **Remember me** checkbox to remain logged in until you manually log out.

Note: If you forgot your password, click the corresponding [link](#) on the login page and submit your email address. Bricsys does not have the ability to change your password.

- 3 Click **Log in**.

Result: The Bricsys 24/7 page appears.

- 4 Click the profile icon/picture on the right side of the project bar.

- 5 Click **Personal details**.

- 6 In the **DETAILS** tab select your preferred language from the **Language** drop-down menu.

- 7 Click the **Save changes** button.

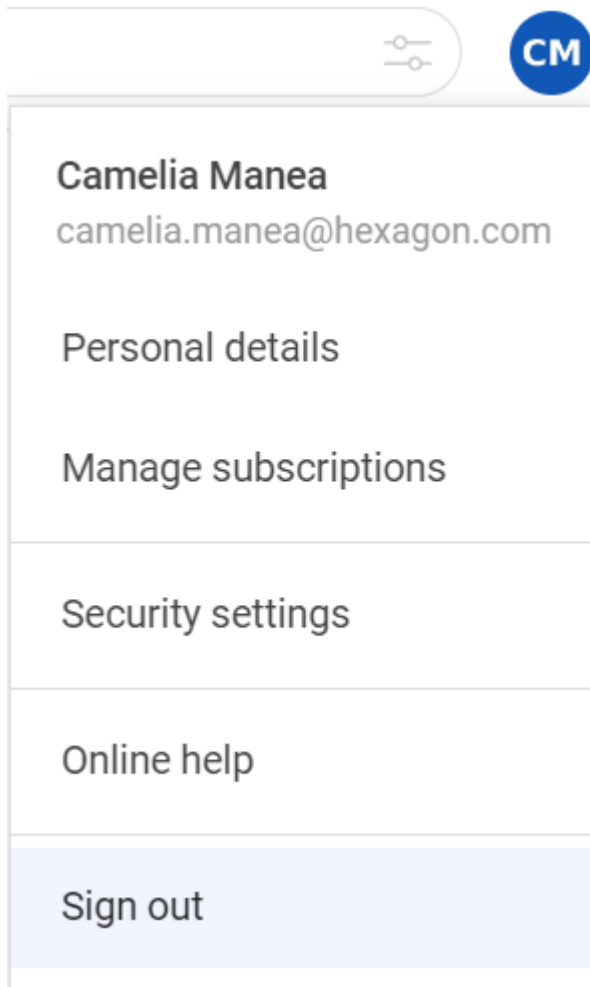
Result: A pop up window informs you that the details are successfully saved.

2.4 Edit your profile

- 1 Log into Bricsys 24/7.
- 2 Click the profile icon/picture on the right side of the project bar.



3



Personal details

Opens the **DETAILS** tab to edit your personal settings:

- Profile picture
- Name
- Security settings
- **Note:** A new instance opens to change the security settings.
- Language
- Address
- Contact details

Note: An invitee or existing user must contact their admin if they want to change their email address.

Click the **Save changes** button. A pop up window informs you about the modifications.

Manage subscriptions

Opens the **SUBSCRIPTIONS** tab to change your subscriptions:

- Subscribe to a **Daily Overview**.

A daily notification email informs you about updates.



- Subscribe to a **Daily Task Overview**.
A daily notification email informs you about open tasks.
- Enable or disable **workflow task notifications**.
A notification email informs you about workflow tasks.
- Check the **Folder subscriptions** overview.

Note:

- Navigate to the specific folder details to subscribe.
- Folder subscriptions are only available if you are logged into a project.

Click the **Save changes** button. A pop up window informs you about the modifications.

Go to the **PERSONAL SETTINGS** tab to:

- Enable or disable **Add revision to document name on download**.
Click the **Save changes** button. A pop up window informs you about the modifications.
- Choose between the old and new interface.
- **Note:** You must restart your project for the changes to take effect.

Security settings

PASSWORD tab

Allows you to set up a new password.

AUTHENTICATOR tab

Allows you to set up Multi Factor Authentication (MFA).

Click the **Save changes** button. A pop up window informs you about the modifications.

Online help

Opens the main page of the Bricsys 24/7 Help Center website.

Sign out

Signs out from your 24/7 account.

Important: You need administrator rights to edit your profile.

Note: A project administrator can give access rights to edit a profile.

2.5 Multi-factor authentication

2.5.1 About

Multi Factor Authentication (MFA) is a multi-step account login process that requires users to enter more information than just a password, further verifying users are who they say they are, and who they are logging in as.

Bricsys 24/7 implements MFA with the need to provide an extra security step through an authenticator app, such as Google Authenticator or Microsoft Authenticator.

When you have enabled MFA on your account, the login procedure will require you to enter the code generated by the authenticator app.



MFA may be required at a project level for all project users, but it is activated at a user level by a user.

2.5.2 Downloading an authenticator app

Authenticator apps generate a one-time code that you can use to sign in. These app providers will not have access to your Bricsys 24/7 password and account information.

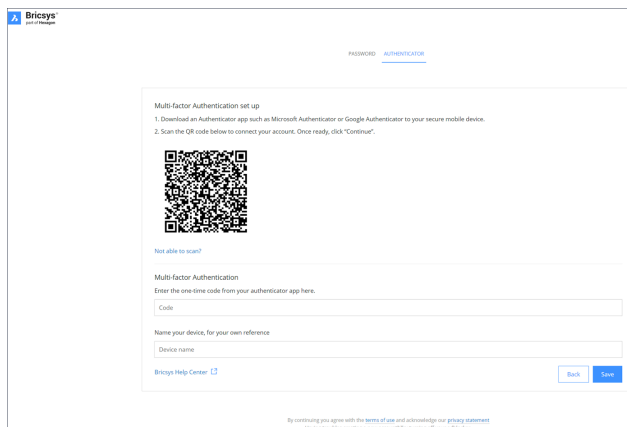
To download an app

- 1 Open the app store of your phone.
- 2 Search for 'authenticator app'.
- 3 Download an app from a trusted provider.
- 4 **Tip:** Check that they have a recovery method if you cannot access your device.
- 5 Open the app and follow the instructions.

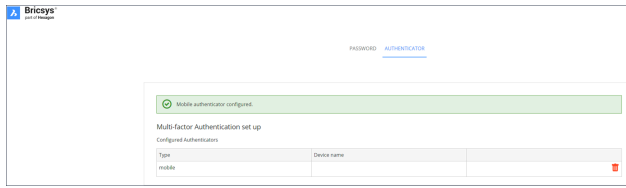
2.5.3 Multi-factor authentication set up

We are using the QR code method for Authenticator app (MFA) set up. This requires that you set up MFA on one device (for example laptop/desktop or tablet), with an authenticator app on a second (mobile) device that has a camera.

- 1 Go to the **AUTHENTICATOR** tab in your Profile, under **Security settings**.
- 2 Scan the QR code with your Authenticator app to connect your account. To scan the code, the second (mobile) device must have a camera.
- 3 **Note:** If the QR code gives an error in the mobile app, click the **Not able to scan?** button and the QR code will be regenerated.



- 4 Type the one-time code received in your authenticator app.
- 5 **Note:** The one-time code will change every 30 seconds.
- 6 Optionally, enter your device name.
- 7 Once ready, click **Continue** to finish the mobile authenticator configuration.



8 If the configured authentication device needs to be changed, it can be deleted from Authenticator page. The page resets to the initial MFA set up page.

Note: An invitee or existing user must contact their admin:

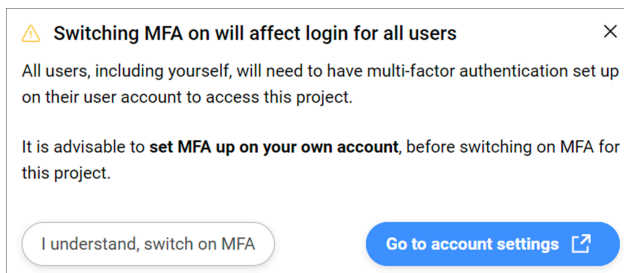
- If they want to change their email address.
- If they have MFA active and lose access to the device or app used for authentication.

Note: When you type a wrong one-time code five times or a wrong password, you are locked out of your account for at least 1 minute and incrementally up to a maximum of 15 minutes.

2.5.4 Activate MFA requirement on a project

To activate multi-factor authentication for a project: go to **Administration > Project settings > Administrator > Login settings** and toggle On the **Multi-factor authentication** option.

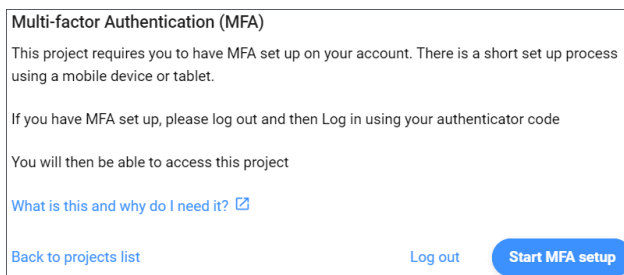
The following warning modal will be displayed to inform the customer admins (which includes the project owner) about the access modification of the specific project.



I understand, switch on MFA

Closes the modal and the changes will be made after pressing **Save changes** button.

If you do not have MFA set up, the following modal will be displayed:



Note: It is not possible to exit this modal.

After you log out and log in again, the one-time code will be required, and you will be able to access the project where you enabled the MFA.

Note: After MFA is enabled, the MFA icon (🔒) will be visible in All projects for your project.



Note: The MFA column in **Administration > Users content** pane is visible to customer admins only, regardless of whether the project has MFA turned on or not.

Note: The **Multi-factor authentication** toggle switch is visible for all administrators, but the radio button can be enabled or disabled only by customer admins.

Note: An invitee or existing user must contact their admin if they want to change their email address.

2.6 Log off

Always log off at the end of your session in Bricsys 24/7.

- 1 Click the profile icon/picture on the right side of the project bar.
- 2 Click the **Sign out** button.

Note: For security reasons, if you do not log off yourself from the session, the system will log you off after 1 hour of inactivity.

2.7 Switch between the old and new user interface

You can switch between the old and new user interface:

- 1 Log into Bricsys 24/7.
- 2 Click the profile icon/picture on the right side of the project bar.
- 3 If you want to switch from the new to the **old** interface:
 - Click **Personal details**.
 - Go to the **PERSONAL SETTINGS** tab.
 - Click the **Use old UI temporarily** button.

If you want to switch from the old to the **new** interface:

- Select **Yes** from the drop-down menu under **Use new Interface**.
- Click **Save**.

A pop up window informs you that the changes are successfully saved.


- 4 Restart your project for the changes to take effect.



3. Navigation

3.1 Search for a project

You can quickly search for a project:

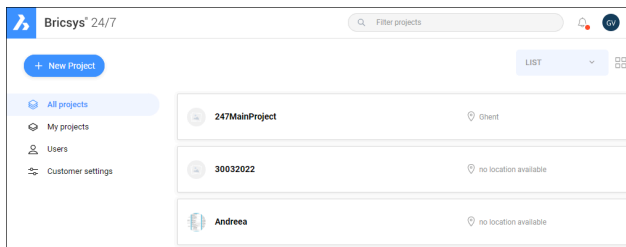
- 1 Click on the arrow icon  next to the selected project in the project bar.

Result: A context menu pops up.

- 2 Click on **Project list**.

Result: A project list is displayed.

Result:



- 3 Choose between these actions:

- Select a project from the list.
- Enter the project name in the search bar and select the project in the filtered project list.

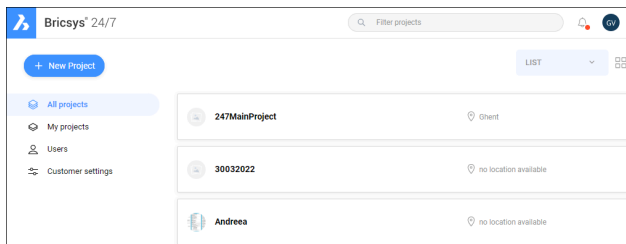
3.2 Select a project

You can quickly select a project:

- 1 Click on the **Bricsys 24/7** logo in the project bar.

Result: A project list is displayed.

Result:



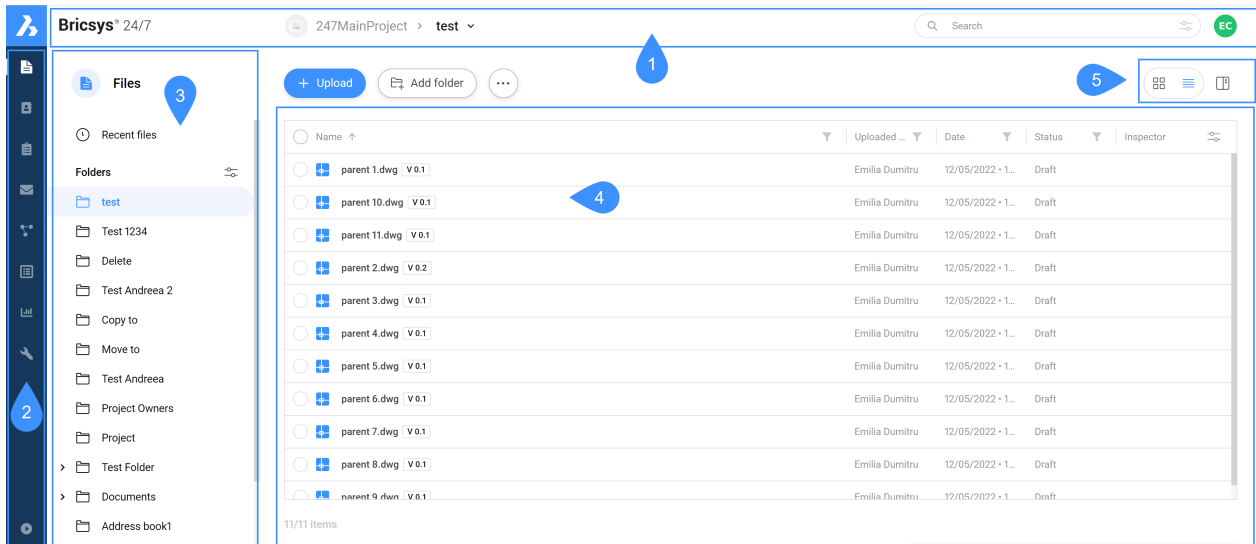
- 2 Select a project in the list to open the project.

Note: You can open only one project at the same time.

Note: If the project administrator has enabled **two-factor authentication** for the project, you need to enter a token from your token card to log in to the project.

3.3 Main window

The main window corresponds to the selected tool.



Legend:

- 1 Project bar
- 2 Toolbar
- 3 Tool menu
- 4 Content pane
- 5 View buttons

The Bricsys 24/7 main window contains:

3.3.1 Project bar

The horizontal project bar is located at the top of the Bricsys 24/7 screen.



The project bar contains:

- The selected project
- The search bar
- The profile/icon picture

3.3.2 Toolbar

The vertical toolbar is located at the top left corner of the Bricsys 24/7 screen.

The toolbar contains the different tools you have access to:

| Icon | Name | Description |
|---|---------------------|--|
|  | Files | Allows you to view your project documents and monitor all your project related activities. |
|  | Address Book | Allows you to manage and categorize all your project contacts. |



| Icon | Name | Description |
|------|-----------------------|---|
| | Tasks | Allows you to find all your tasks and filter them on folder or workflow. Displays the number of open tasks. |
| | Messages | Allows you to send and receive messages to and from other project members. |
| | Workflows | Allows you to design and edit workflows using an intuitive drag and drop editor. |
| | Forms | Allows you to build forms and store metadata using an intuitive drag and drop system. |
| | Reports | Allows you to review workflows by filtering on time frame, workflow, folders and assigned actors for the tasks. |
| | Administration | Allows project administrators to manage a project. |

Tip: To expand the toolbar, click **Expand menu** at the bottom left corner of the Bricsys 24/7 screen.

3.3.3 Tool menu

The vertical tool menu corresponds to the selected tool.

Tip: To expand a menu item, click on the arrow icon next to the item.

3.3.4 Content pane

The objects in the selected folder are displayed in the content pane. The content pane corresponds to the selected tool.

3.3.5 View buttons

The view buttons correspond to the selected tool and folder.

| Icon | Name | Description |
|------|-------------|---|
| | Change view | Allows you to view ACTIVITY and DETAILS . In case of a BIM file, DATA is also shown. |
| | Change view | Allows you to change the view of the content to thumbnail view . |
| | Change view | Allows you to change the view of the content to list view . |



| Icon | Name | Description |
|------|-----------|--|
| | Inspector | Allows you to show or hide certain columns. When working with metadata, the extra metadata columns are displayed here as well. |
| | Filter | Allows you to filter the items in the selected folder. |
| | Sort | Allow you to sort the items in the selected folder. |
| | | |

3.4 Search in a project

Bricsys 24/7 contains a search function for the entire project.

3.4.1 Perform a quick search in a project

- 1 Select a project.
- 2 Enter the first 3 characters of the document or folder name you are looking for in the search bar.
- 3 The results appear in a pop up window.
- 4 Click the applicable document to open the document details, or click the applicable folder to open the folder in the content pane.

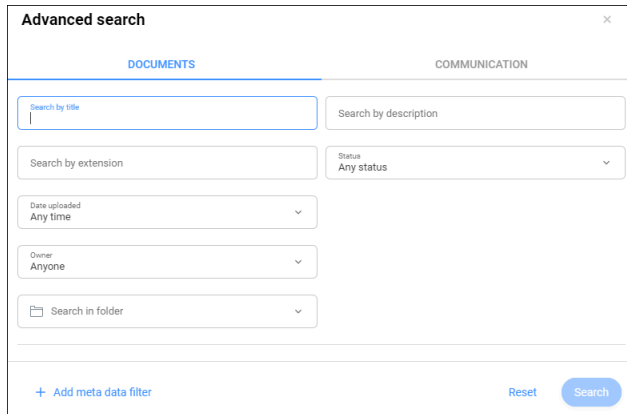
Note: You can use wild cards in the search function:

- The asterisk (*) wild card matches a sequence of characters.
- The question mark (?) wild card matches any character.

3.4.2 Perform an advanced search in a project

- 1 Select a project.
- 2 Click on the slide control icon on the right side of the search bar.

The *Advanced search* window appears, including specific search criteria to narrow down the results.



- 3 Click **Documents** to perform a search of the documents:
 - a Enter or select the appropriate search criteria.
 - a You can search:
 - by title
 - by description
 - by extension
 - by status
 - by upload date
 - by owner
 - Tip:** Choose **Select contact** to perform a search by author.
 - per folder
 - b If applicable, click **Add meta data filter**.
Select the appropriate metadata and click **OK**.
 - c Click **Search**.
 - d Check the search results.
 - e If applicable, click **Refine search** to adjust the search criteria, and perform a new search.
- 4 Click **Communication** to perform a search in the communication:
 - a Enter or select the appropriate search criteria.
 - a You can search:
 - by subject
 - by message content
 - by sender
 - by receiver
 - by type of communication
 - per folder
 - by upload date



- b Click **Search**.
- c Check the search results.
- d If applicable, click **Refine search** to adjust the search criteria, and perform a new search.

3.5 Keyboard shortcut overview

Keyboard shortcuts that you can use in the content pane:

| Keyboard shortcut | Description |
|-------------------|--|
| Ctrl + A | Click on the content pane, and use Ctrl + A / Command + A to select all items in a window. |
| Command + A | |
| Shift + click | Click on a checkbox in a list, hold down the Shift key, and select a second checkbox. The checkboxes that are between the 2 checkboxes will also be selected. |
| Esc | Deselect all selected items in a window. |



4. Daily operation

4.1 Communication


Communication is an important factor for project collaboration in Bricsys 24/7.

There are 4 types of communication:

- Notifications
- Notes
- Messages
- Annotations

4.1.1 Send a notification

Inform project members about an update by sending a notification.

- 1 Select one of the applicable tools in the toolbar: **Files**, **Tasks**, **Workflows** or **Forms**.
- 2 Select the applicable folder, document, task, workflow or form in the tool menu or content pane.
- 3 Click **Send notification**, or click the ellipsis button  and click **Send notification** in the context menu.
Result: The *Message* window appears.
- 4 Add the recipients in the **To** field.
- 5 If applicable, edit the **Subject**.
- 6 Write a message.
- 7 Click **Send**.

Result: A pop up window informs you that the notification is sent. The recipients will receive an email with your message.

Note: You can edit your notification preferences in **Profile settings**.



4.1.2 Notes

Notes are visible in all the revisions of a document. You can use public or private notes.

When you select project members in the note, the note becomes private. Only the selected project members will be able to view the note.

Important: Project administrators can view all (public and private) communications.

4.1.2.1 Add a note to a document

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the applicable document.
- 4 Click the ellipsis button  at the top of the content pane.
A context menu pops up.



- 5 Click **Add note**.

The *Add note* window appears.

- 6 Enter a **Subject**.

- 7 Choose between **Public** and **Private** visibility.

- 8 Write a note.

- 9 Click **Add**.

A pop up window informs you that the note is uploaded.

If applicable, click **Send notification** in the pop up window to inform users by email.

A note icon is added to the document in the content pane.

4.1.3 Messages

The **Messages**  tool:

- allows you to communicate effectively with project members.
- allows you to send both private and public messages to other project members.
- contains and safeguards all communications.

Note: You must have access to the **Messages** tool to receive messages. Access can only be granted by a project administrator.

Note: Project administrators can also enable email forwarding for a specific email address. This allows to send an email to the specific email address and display the email in Bricsys 24/7.

Note: The Activity/Details panel displays message and folder details. The panel is only available for messages under **PROJECT** in the tool menu.

4.1.3.1 Send a message

- 1 Click **Messages**  in the toolbar.

- 2 Click **New message**.

The *Choose message folder* window appears.

- 3 Select the applicable message folder.

- 4 Click **Select**.

A *Message* window appears.


- 5 Add the recipients in the **To** field.

Note: You can only add users with access to the **Messages** tool.

- 6 Enter a subject in the **Subject** field.

- 7 Write a message.

- 8 **Tip:** You can adjust the layout.

- 9 If applicable, click the cloud icon  to attach a document from your project in Bricsys 24/7.



10 If applicable, click the paperclip icon  to attach a document from your local device.

11 Click **Send**.

A pop up window informs you that the message is sent.

The recipients receive an email with a direct link to the **Messages** tool where they can read the content of the message.

4.1.3.2 Attach a workflow to a message

1 Click **Messages**  in the toolbar.

2 Select a **Project** message folder in the tool menu.

3 Select the applicable message in the content pane.

4 Click the ellipsis button  at the top of the content pane.

A context menu pops up.

5 Click **Attach workflow**.

The **Attach workflow** window appears.

6 Choose a workflow.

7 Select a coordinator.

8 Enter a workflow name.

9 If applicable, enter a description.

10 Click **Add**.

A pop up window informs you that the workflow is attached to the message.

A workflow icon is added to the message in the content pane.

The workflow name is displayed in the content pane.

4.1.3.3 Add a message to a binder

1 Click **Messages**  in the toolbar.

2 Select a **Project** message folder in the tool menu.

3 Select the applicable message in the content pane.

4 Click the ellipsis button  at the top of the content pane.

A context menu pops up.

5 Click **Add to binder**.

The **Add to binder** window appears.

6 Select the binder(s) you want to add the message to.

7 **Note:** If available, you can select a sub-binder by clicking the arrow (1) next to the folder name.



Add to binder

Select the binder(s) you wish to add the message(s) to

[All projects](#) / Camelia

 BIM folder

 Document Folder

 Form

 New folder

 New Binder

 111

8 Click **Add**.

A pop up window informs you that the items are added to the binder(s).

4.1.4 Add recipients

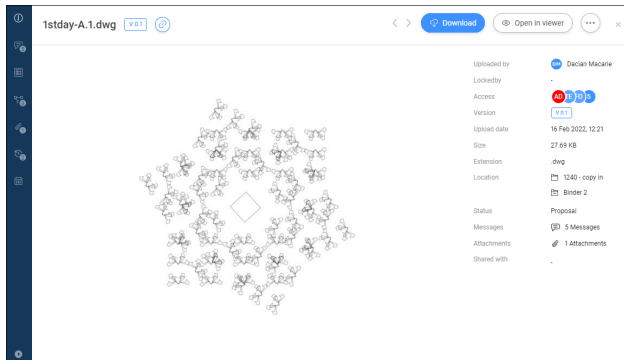
- 1 Enter the name of a project member, or enter an email list in the **To** field of a communication window. Email lists are set up by the project administrator.
- 2 If applicable, edit the email list:
 - a Select the email list.
 - b Untick the checkbox next to the project member.


Important: You can only add recipients who are allowed to view the applicable item. The project administrator needs to give you access to communicate with other project members.

4.2 Consult document details



- 1 Select a document in the content pane.
Result: A window displays the document details.

Result:



- 2 To expand the menu, click **Expand menu**  at the bottom left corner of the window. The vertical menu contains different options:
 - Info
 - Communication
 - Metadata
 - Workflows
 - Attachments
 - Versions
 - History
- 3 Select an option in the vertical menu to perform additional actions. The available actions correspond to the selected option.




Examples:

- Share a revision or a document via the  icon.
Choose between **Revision** and **Document**.
Click the button  next to the URL to copy the URL to the clipboard.
- Remove metadata via the **Delete meta data** button.



The *Delete meta data* window appears.

Click **Delete** to **permanently** delete the metadata.

- Cancel a workflow via the ellipsis button  and **Cancel workflow** button.
- Skip a workflow activity via the **Skip activity** button for a workflow with an automated task.
- Download attachments via the  icon.
- Remove attachments via the **X** icon.
- Delete a revision via the vertical ellipsis  button and **Delete version** button.

4.3 Bricsys 24/7 Viewer

The Bricsys 24/7 Viewer allows you to view more than 70 file formats without additional software.

The supported file formats are:

| Format | File extension |
|--------|--|
| Text | asm, bat, c, css, cpp, cxx, gene, h, hxx, idh, idl, inl, java, log, lsp, rss, sql, tpl, text, txt, xml |
| Image | bmp, gif, jpg, jpeg, pcx, pgm, pict, png, ppm, tga, tif, tiff, xbm, xpm, xwd, ai, psd |
| Office | doc, docx, dot, dotx, mpp, odf, odg, odp, ods, odt, potx, pps, ppsx, ppt, pptx, rtf, xls, xlsb, xlsx, xlt, xltx, vsd |
| CAD | dwg, dwf, dwfx, dxf, dgn, plt, hp, hpg, hpg, ifc* |
| Other | htm, html, pdf, ps, zip |

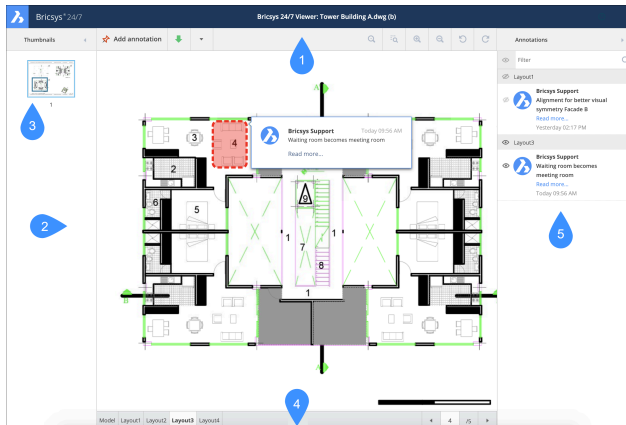
(*) Only IFC2x3 (coordination view 2.0) is supported.

4.3.1 Open the Bricsys 24/7 Viewer

- 1 Make sure that a document details window is selected.
- 2 Click **Open in viewer**.

The Bricsys 24/7 Viewer opens.

4.3.2 Navigation in Bricsys 24/7 Viewer



The Bricsys 24/7 Viewer contains:

1 Menu bar

- **Thumbnails:** show or hide thumbnails
- **Add annotation**
- **Download**
- **Print to PDF**
- **View, Zoom and Rotation** icons
- **Annotations** icon: show or hide annotations

A counter indicates the number of annotations in a document.

2 Thumbnail pane

3 A thumbnail is displayed for each available page. Click on a thumbnail to open the corresponding page.

4 Current view of the document

5 The selected thumbnail is highlighted and the viewed area is indicated.

6 Status bar

7 The available layouts or sheets of a document are displayed via tabs.

8 Annotation pane

4.3.3 Annotations

Annotations allow you to comment on a specific area of a document.


4.3.3.1 Create an annotation

You can add one or more annotations and inform project members:

- 1 Click **Add annotation** in the menu bar.
- 2 Select the type of annotation:
 - rectangle
 - ellipse
 - line



- arrow

- 3 Draw the shape in the area you want the annotation to cover.
- 4 Enter a comment in the **Subject** field.
- 5 If applicable, click **More text...** to enter a more elaborate comment.
- 6 If applicable, click the paperclip icon  to attach a document.
- 7 If applicable, click on **Public** and select **Private** if you want to send the annotation only to selected users.

Result: **Select contacts** is displayed.

Select the applicable project members.

- 8 Click **Post**.


Result:

- The annotation is displayed in the Bricsys 24/7 Viewer.
- The counter indicates the updated number of annotations in the document.
- A pop up window informs you that the annotation is uploaded.

- 9 If applicable, click **Send notification** in the pop up window to inform users by email about changes in your project.
- 10 Add the recipients in the **To** field.
- 11 If applicable, edit the **Subject**.
- 12 Write a message.
- 13 Click **Send**.

Result: A pop up window informs you that the notification is sent. The recipients will receive an email with your message.

4.3.3.2 View annotations

- 1 Click the **Annotations** icon  in the menu bar to open the annotation pane.
- 2 Select an annotation to display the corresponding comment.
- 3 If applicable, click on the **eye** icon to show or hide annotations.

Note: Annotations are revision-based. This means you can not see the annotations of previous revisions when viewing the latest version of the document.

4.4 Tasks

A task is:

- part of a process set up by a project administrator using workflows
- an activity assigned to a project member.

4.4.1 Consult the number of open tasks that are assigned to you



- 1 Check Tasks  in the toolbar.



- 2 Consult the red counter.
- 3 The counter displays the number of open tasks.



4.4.2 You can consult your tasks in:

- The **Tasks**  tool
- The **Reports**  tool.

Note: You need the appropriate rights

4.4.3 Change your communication preferences in the profile settings

- 1 Click on the profile icon/picture on the right side of the project bar.
- 1 A context menu pops up.
- 2 Click **Manage subscriptions**.
- 3 Enable **Daily Task Overview** if you want to receive a daily email about the open tasks in your projects.
- 4 If applicable, adjust the time slot.
- 5 Enable **Workflow task notifications** if you want to receive email notifications about workflow tasks.
- 6 Click **Save changes**.



A pop up window informs you that the subscriptions are updated.




5. Tools

5.1 Files

The **Files**  document management tool:

- Is the central hub of a project in Bricsys 24/7.
- Displays your recent files.
- Displays all project folders in a tree structure.
- Contains one or more **document folders** .
- Contains one or more **binders** , if set up by the project administrator.

When a folder in the Files app has no contents, it is displayed greyed out . If a folder contains no documents, but does contain a subfolder, the folder is no longer empty.

Note: It applies to all types of folders from the Files app: Document, BIM, and Binder.

5.1.1 Change the view of the folders

- 1 Click on the slide control  icon in the tool menu.

A context menu pops up.

- 2 Choose an option:
 - Expand all folders
 - Collapse all folders
 - Hide empty folders
 - Refresh folders

5.1.2 Documents




A **document folder**  displays the statuses and details of all items in a project folder.

By default, all items are sorted by date they were added. The most recent items are displayed on top of the content pane.

Tip: Click on a column header to sort the items in that column. If you sort on Name, the sorting will be done numerically.

5.1.2.1 Show or hide columns

You can show or hide columns in the content pane:

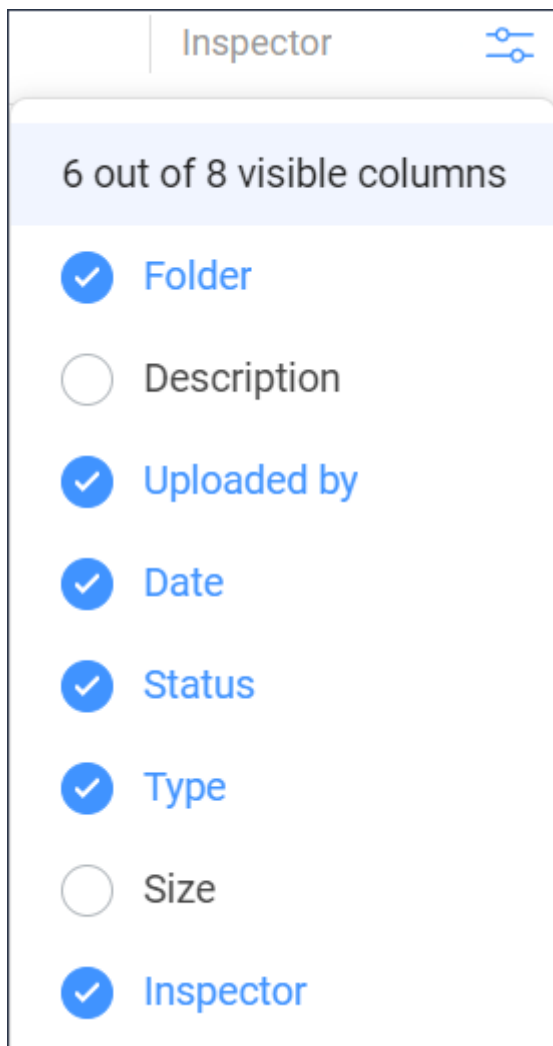
- 1 Click **Files**  in the toolbar.
- 2
 - Click a document folder  in the tool menu.
 - Click **Recent files**.
- 3 Click  at the top right corner of the content pane.



A drop-down menu appears.

Note:

- **Folders:** The available columns correspond to the metadata linked to the selected document folder.
- **Recent files:** The columns in recent files are generic and cover all common file parameters. The available columns are: **Folder, Description, Uploaded by, Date, Status, Type, Size** and **Inspector**.



- 4 Select or deselect the columns you want to show or hide in the content pane.
- 5 Example: The **Inspector** column displays the number of available communications, workflows, and attachments.



Note: A red dot next to a workflow icon indicates that an active workflow task is assigned to you.



The selected columns are displayed in the content pane.

5.1.2.2 Upload a document

You can upload one or more documents:

1 Click **Files**  in the toolbar.

2 Click **Upload**.

Result: A modal window appears.

3 Select the document(s) you want to upload.

4 Click **Open** (Windows) or **Choose for Upload** (Mac).

Result: The *Choose a folder to upload to...* window appears.

5 Select the folder you want to upload to.

6 Click **Confirm**.

Result: The *Uploading* window appears.

7 If applicable, add a status and a description per document, and select the appropriate options.

Note: The available document statuses correspond to the project settings.

Note: If the file name already exists in the folder you want to upload to, you can:

- Tick the **upload this document as a copy** checkbox to upload the document as a separate file. If applicable, enter the required options.
- Tick the **Replace last revision** checkbox to upload the document as a new revision.

Note: If you are uploading multiple documents, you can click **apply data to all uploads** to copy the added information to all documents you want to upload.

8 Click **Upload**.

Result: A pop up window shows the upload progress and informs you that the documents are successfully uploaded. The uploaded documents are visible in the content pane.

Note: As an alternative, you can first select a folder in the tool menu, before you click on **Upload**.

Note: The maximum upload size is 20 GB.

Tip: If you want to upload a lot of documents simultaneously, you can use the Bricsys 24/7 Transfer Tool.

5.1.2.3 Upload a zip file

You can upload one or more zip files:

1 Click **Files**  in the toolbar.

2 Select the folder you want to upload to.

3 Click **Upload**.

Result: A modal window appears.

4 Select the zip file(s) you want to upload.



- 5 Click **Open** (Windows) or **Choose for Upload** (Mac).

Result: The *Uploading* window appears.

- 6 If applicable, add a status and a description per document, and select the appropriate options.

Note: The available document statuses correspond to the project settings.

Note: If you are uploading multiple zip files, you can click **apply data to all uploads** to copy the added information to all documents you want to upload.

Note: If the file name already exists in the folder you want to upload to, you can:

- Tick the **upload this document as a copy** checkbox to upload the zip file as a separate file. If applicable, enter the required options.
- Tick the **Replace last revision** checkbox to upload the zip file as a new revision.

- 7 Tick the **Unzip file after upload** checkbox per zip file.

- 8 Click **Upload**.

Result: A pop up window shows the upload progress and informs you that the documents are successfully uploaded. The unzipped files are displayed in the content pane.

5.1.2.4 Drag and drop a document

You can drag and drop one or more documents:

- 1 Click **Files**  in the toolbar.

- 2 Select the folder you want to upload to.

- 3 Drag and drop the document(s) from your local device to the content pane.

Note: You can also first click on the file to open it and then drag and drop a new version of the file from File Explorer.

Result: The *Uploading* window appears.

- 4 If applicable, add a status and a description per document.

Note: The available document statuses are: draft, proposal, in preparation, revised, and approved with remarks.

Note: If you first open the document and drag a file with the same extension from File Explorer, you can tick the option **Rename to:** to rename the document.

Note: If the file name already exists in the folder you want to drag and drop a file to, you can:

- Tick the **upload this document as a copy** checkbox to upload the document as a separate file. If applicable, enter the required options.
- Tick the **Replace last revision** checkbox to upload the document as a new revision.

- 5 Click **Upload**.


Result: A pop up window shows the upload progress and informs you that the documents are successfully uploaded.

Tip: If you want to upload a lot of documents simultaneously, you can use the Bricsys 24/7 Transfer Tool.

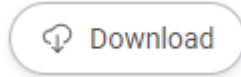


5.1.2.5 Download a document

You can download one or more documents:

- 1 Click **Files**  in the toolbar.
- 2 Select the folder you want to download from.
- 3 Select the document(s) you want to download.

- 4 Click **Download**





Result: The document is saved to your download folder. If you selected multiple documents, a zip file is saved to your download folder.

Note: The maximum download size for multiple documents is 4 GB. There is no maximum download size for a single document.

5.1.2.6 Download and lock a document


You can download and lock a document:

- 1 Click **Files**  in the toolbar.
- 2 Select the folder you want to download from.
- 3 Select the document you want to download and lock.
- 4 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Download and lock** .



Result: The document is saved to your download folder and is displayed as locked in the content pane.

Result: Example:  Villa.dwg

The document can not be edited or moved by other project members.

5.1.2.7 Lock a document

You can lock one or more documents:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document(s) you want to lock.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Lock** .

Result:

- A pop up window informs you that the documents are locked.





- The documents are displayed as locked in the content pane.



- The document(s) (including revisions) can not be edited or moved by other project members.

5.1.2.8 Unlock a document

You can unlock one or more documents:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document(s) you want to unlock.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Unlock** .



Result:

- A pop up window informs you that the documents are unlocked.
- The documents are displayed as unlocked in the content pane.



5.1.2.9 Promote major version

You can promote the last revision to a major version:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document you want to promote.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Promote major version**.

Result: The *Promote major version* window appears.

- 6 Click **OK** to confirm.

Result:



- A pop up window informs you that the major revision is promoted.
- If applicable, click **Send notification** in the pop up window to inform users by email.
- The updated document is displayed in the content pane.





5.1.2.10 Edit document details

You can edit document details:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document you want to edit.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Edit**.

Result: The *Edit document details* window appears.

- 6 Edit the document details:

- Name
- Status

Note: The available document statuses correspond to the project settings.

- Description

Note: If applicable, the **Project Owner** and **Contractor details** are displayed.



- 7 Click **Edit**.

Result: A pop up window informs you that the document is successfully updated.

Result: If applicable, click **Send notification** in the pop up window to inform users by email.

5.1.2.11 Link metadata to a file


1 Link an entry to a file

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document you want to attach metadata to.
- 4 Click the ellipsis button  at the top of the content pane.
- 5 A context menu is displayed.
- 6 Click the **Attach > Entry** button.

The **Select form entry** window appears.


- 7 Select the entry you want to attach.
- 8 Click the **Link** button.

2 Viewing linked metadata

- 1 Click the name of the document you attached metadata to. A window with a preview and more detailed information about the document opens.
- 2 Select **Attachments**  in the toolbar.





All the attachments (documents and entries) of the document are displayed.

- 3 Click the form title to open a modal with the form record values.
 - Click the **Links** button to see the links.
 - Click the **Edit** button to open the **Edit record** window, where you can edit all form record values.
- 4 Click the  button to remove an attached entry.

5.1.2.12 Copy a document

You can copy one or more documents to another folder:



- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document(s) you want to copy.
- 4 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Copy**.
Result: The *Copy* window appears.
- 6 If applicable, edit the document name, and update the status.
- 7 Select the target project and folder.
- 8 If applicable, enable **Add as a revision of**.
- 9 If applicable, tick **Copy with notes and annotations**.
- 10 Click **Copy**.

Result: A pop up window informs you that the documents are copied.

Result: If applicable, click **Send notification** in the pop up window to inform users by email.

5.1.2.13 Add a document to a binder

You can add a document to one or more binder folders:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document(s) you want to add to a binder folder.
- 4 Click the ellipsis button  at the top of the content pane.
A context menu pops up.
- 5 Click **Add to binder**.
The **Add to binder** window appears.
- 6 Select the binder(s) you want to add the document to.
- 7 **Note:** If available, you can select a sub-binder by clicking the arrow (1) next to the folder name.



Add to binder

Select the binder(s) you wish to add the document(s) to

[All projects](#) / Camelia

 BIM folder

 Document Folder

 Form

 New folder

 New Binder

 111

Select revision

All



8 **Optional:** Click **Select revision** to choose a specific revision to add it in the binder.

Note: If you do not select a revision, you will always see the latest version in the binder.

9 Click **Add**.

A pop up window informs you that the documents are added to the binder(s).

5.1.2.14 Share a document

You can share a document with a contact who is not a member of the project:

1 Click **Files**  in the toolbar.

2 Select the applicable folder.

3 Select the document you want to share.

4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

5 Click **Share document**.


Result: The *Shared link* window appears.

6 Enable **Public sharing**.

Result: A unique URL is created.

7 Enter the email address(es) of the contact(s) you want to send the URL to.

8 Enter a message to be included in the email.

9 If applicable, click the button  next to the URL to copy the URL to the clipboard.

10 Click **Share**.

Result:

- A pop up window informs you that the mails are successfully sent.
- Your contact can use the URL to open the document in the Bricsys 24/7 viewer:
 - without logging into the project
 - without access rights to the shared folder.

5.1.2.15 Deactivate document sharing

You can turn off the public sharing:

1 Click **Files**  in the toolbar.

2 Select the applicable folder.

3 Select a shared document.

4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

5 Click **Share document**.




Result: The *Shared link* window appears.



- 6 Disable **Public sharing**.
Result: The original URL no longer works.
- 7 Click **OK**.

5.1.2.16 Share a folder



You can share a folder with a contact who is not a member of the project:

- 1 Click **Files**  in the toolbar.
- 2 Select the (sub)folder you want to share in the tool menu.
- 3 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 4 Click **Share folder**.
Result: The *Shared link* window appears.
- 5 Enable **Public sharing**.
Result: A unique URL is created.
- 6 If applicable, click the  button next to the URL to copy the URL to the clipboard.
- 7 Click **OK**.

Result: You can share the URL with a contact.



5.1.2.17 Folder notifications

You can view the list of the notifications of a specific folder.

- 1 Click **Files**  in the toolbar.
- 2 Select the (sub)folder for which you want to view the notifications.
- 3 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 4 Click **Folder notifications**.
Result: A window appears that displays the notification list.

5.1.2.18 Deactivate folder sharing

You can turn off the public sharing:

- 1 Click **Files**  in the toolbar.
- 2 Select the shared folder.
- 3 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 4 Click **Share folder**.
Result: The *Shared link* window appears.
- 5 Disable **Public sharing**.





Result: The original URL no longer works.

- 6 Click **OK**.

5.1.2.19 Add a hyperlink to a folder

You can add a hyperlink to a (sub)folder:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable (sub)folder in the tool menu.
- 3 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 4 Click **Add hyperlink**.



Result: The *New hyperlink* window appears.

- 5 Enter a name.
- 6 Add a link to an external website or an internal document.
- 7 If applicable, enter a description.
- 8 Click **Add**.

Result: A pop up window informs you that the hyperlink is successfully added.

5.1.2.20 Link a contact to a folder

You can link one or more contacts to a folder:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable (sub)folder in the tool menu.
- 3 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 4 Click **Link contact**.



Result: The *Link contacts* window appears.

- 5 Select the applicable contact(s), or perform a search.
- 6 Click **Link**.

Result: A pop up window informs you that the contacts are imported.

5.1.2.21 Generate a QR code

You can generate a QR code for a document:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder.
- 3 Select the document you want to create a QR code for.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.



- 5 Click **Generate QR code for**.

Result: The *Generate QR code for* window appears.

- 6 Select the option you want the QR code to link to:

- Document details
- View
- Download

- 7 Click **Download**.

Result: An image including the QR code is saved to your download folder.



- 8 Scan the QR code to access the document.

Note: The user must log into the project with a Bricsys 24/7 account.

Note: The *Generate QR code for window* displays an extra option for documents with multiple revisions.

5.1.2.22 Print to PDF

You can print one or more documents to a PDF:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable folder in the tool menu.
- 3 Select the document(s) you want to print.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Print to PDF**.

Result: The *Print to PDF* window appears.

- 6 Select the items you want to print:

- Document details
- Contents
- Select the checkbox to display additional options:
- **All:** prints all available pages.

Note: The maximum number of pages that can be printed to PDF is 50.

- **Pages:** allows you to manually select the pages you want to print by typing in a page range (for example 9-12), a single page number, or combinations, separated by commas.



Print to PDF

Select the items you want to print to PDF.

Select all

Document details

Contents

All

Pages

e.g. 1-3, 6, 8-10

- Binders
- Revisions
- Links
- Communications
- Metadata
- Workflows

Tip: Click on the **Select all** checkbox to select all available items.

Note: The available items correspond to the selected document(s).





7 Click **Print**.

Result: The PDF is saved to your download folder.



5.1.2.23 Export document details and revisions

You can export document details and revisions to an Excel file:

- 1 Click **Files**  in the toolbar.
- 2 Click on a documents folder , or a binder  in the tool menu.
- 3 Click the **ellipsis** button  and click **Export to .xls** in the context menu.

Result: The *Export to .xls* window appears.

- 4 Select the options you want to export:
 - Document details
 - Revisions
 - Meta data
 - Workflows
 - Active workflow tasks
 - Finished workflow tasks

- 5 If applicable, select **Download subfolders too**.


- 6 Click **Download**.

Result: An Excel file including the selected options is saved to your download folder.

- 7 Click **Cancel** to close the *Export to .xls* window.


Note: If you export a complete project, or folders including subfolders, you will receive the Excel file by email.

5.1.3 Binders

A **binder**  is a folder that contains a specific collection of shared documents. Users can access the shared documents in the binder, without having access to the original folder.

5.1.3.1 Add documents to a binder

You can add one or more documents to a binder:

- 1 Click **Files**  in the toolbar.
- 2 Select the binder you want to add the document(s) to.
- 3 Click **Add to binder**.

The *Add items* window appears.

- 4 Select the document(s) you want to add to the binder.
- 5 Click **Add documents**.


A pop up window informs you that the items are added to the binder.

If applicable, click **Send notification** in the pop up window to inform users by email.



5.1.3.2 Remove a document from a binder

You can remove one or more documents from a binder:

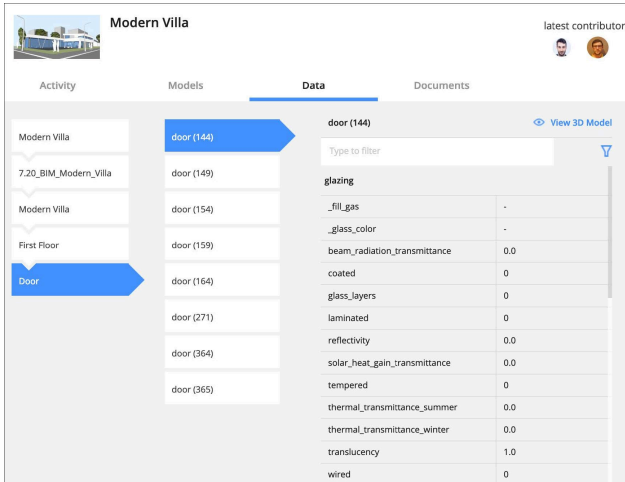
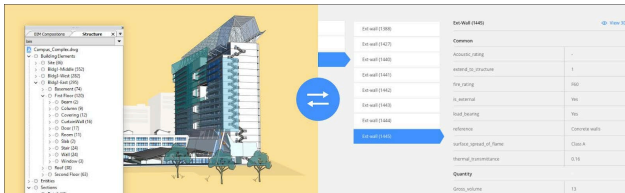
- 1 Click **Files**  in the toolbar.
- 2 Select the binder you want to remove the document(s) from.
- 3 Select the document(s) you want to remove from the binder.
- 4 Click **Remove from binder**.

A pop up window informs you that the items are removed from the binder.

5.1.4 BIM files

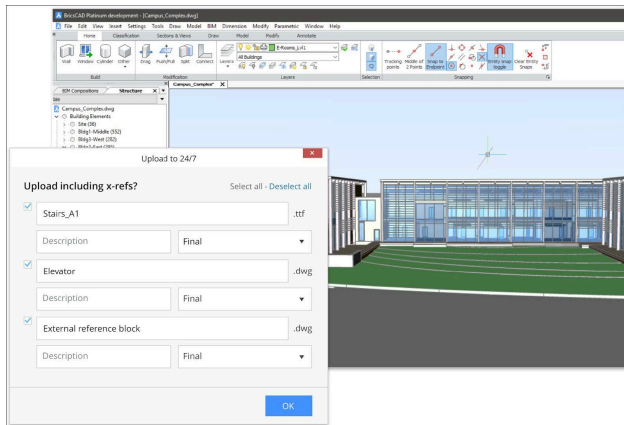
5.1.4.1 Centralize, store, and manage your BIM

Bricsys 24/7 handles projects with vast amounts of BIM data and all associated documents. 24/7's model server manages all of the information that comprises a construction project. You can query, merge and filter your view of the BIM model depending on your individual needs.





5.1.4.2 Upload from BricsCAD with Full XREF management

When serving a BricsCAD BIM model using external references, Bricsys 24/7 recognizes and automatically manages the links between the files. A direct connection to Bricsys 24/7 is available in BricsCAD and BricsCAD BIM.



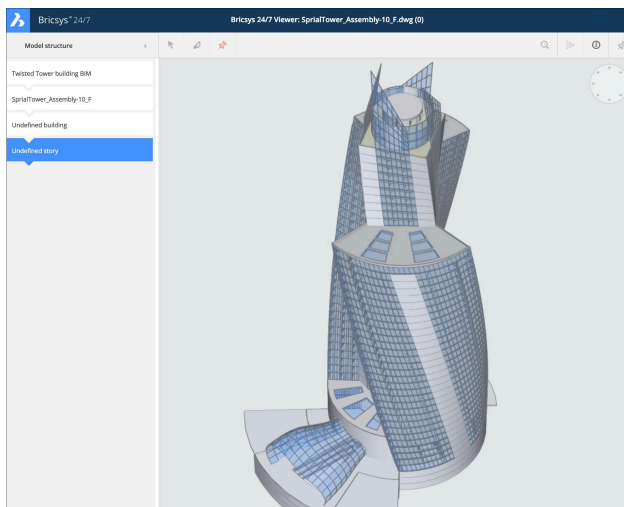
5.1.4.3 View BIM data

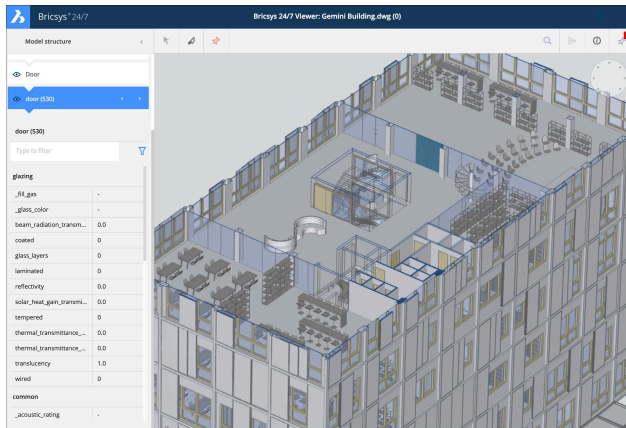
- 1 Click Files  in the toolbar.
- 2 Select the applicable BIM folder or file.
- 3 Click  to open the DATA/ACTIVITY/DETAILS pane.

You will see a list of BIM data in the DATA tab. Select one to view the details.

5.1.4.4 3D Viewer: View and explore your BIM

To view the BIM data in 3D, select the data in the DATA tab and click **View in 3D model**.






5.1.4.5 Industry Foundation Classes (IFC)

Bricsys 24/7 provides full IFC support. IFC allows the accurate transfer of BIM data across multiple applications programs, and between disciplines. IFC2x3 (coordination view 2.0) is supported.

Upload IFC files



- 1 Click **Files**  in the toolbar.
- 2 Select a BIM folder.
- 3 Click **Upload**.

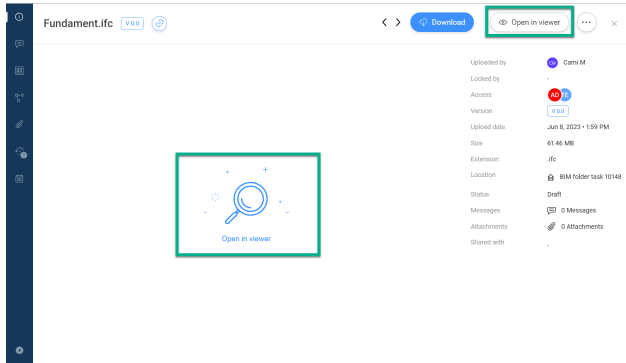
A modal window appears.

- 4 Select the IFC file(s) you want to upload.
- 5 The **Uploading** window appears.
- 6 Set the status.
- 7 **Optional:** type a description.
- 8 Click **Upload**.

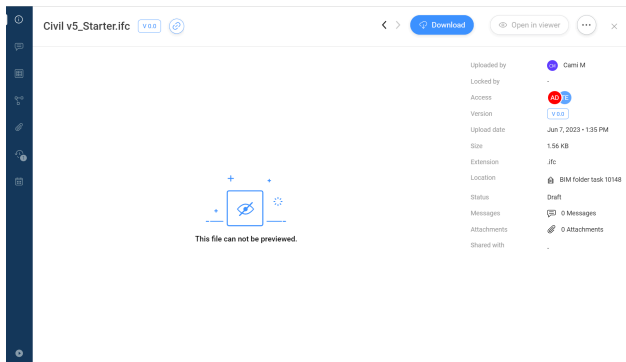
A pop up window informs you that the IFC file is successfully added.

View IFC files

- 1 Click **Files**  in the toolbar.
- 2 Select a BIM folder that contains IFC files.
- 3 **Note:** If an IFC file is viewable, the file type icon () is displayed.
- 4 Click the IFC file.
- 5 The file details window opens.
- 6 In the **Info tab** click **Open in viewer** to open the file in the **Bricsys 24/7 Viewer**.



Note: If an IFC file is not viewable, the **Open in viewer** button is grayed out and the information that the file can not be previewed is displayed.



5.2 Address Book


The **Address Book**  tool allows you to:

- Manage all your project contacts.
- Categorize contacts into organizations.
- Use different address books in a project.
- Download electronic business cards.

Note: If a contact is a Bricsys 24/7 user, a blue cloud appears on the contact's profile picture.

5.2.1 Create a contact

You can create a new contact:

- 1 Click **Address Book**  in the toolbar.
- 2 Click **New**.
A context menu pops up.
- 3 Select **Contact**.

Result: The *Add contact* window appears.

- 4 Enter the contact details.

Note: First name, last name, and email address are required fields.



5 If applicable, select an address book and organization.

6 Click **Add**.

Result: A pop up window informs you that the contact is successfully created.

5.2.2 Import a contact from an address book

You can import an existing contact from another address book you have access to:

1 Click **Address Book**  in the toolbar.

2 Click **New**.
A context menu pops up.

3 Select **Import contact**.
Result: The *Import contact* window appears.

4 Enter the email address of the contact you want to import.
Result: The name of the contact appears.

5 Select the contact.

6 Click **Import contact**.
Result: A pop up window informs you that the contact is imported.

5.2.3 Import contacts from a CSV file

You can import contacts from a CSV file.

Make sure that the columns of your CSV file are linked to existing columns in Bricsys 24/7:

- First name
- Last name
- Email
- Function
- Organizations
- Address
- Postal/Zip code
- City
- Province/State
- Country
- Phone
- Mobile
- Fax.

1 Click **Address Book**  in the toolbar.

2 Select the applicable address book in the tool menu.

3 Click the **ellipsis** button  at the top of the content pane.



Result: A context menu pops up.

- 4 Click **Import from CSV**.

Result: The *Import as CSV file in internal address book* window appears.

- 5 Click **Select a CSV file**.

Result: A modal window appears.

- 6 Select the CSV file you want to upload.

- 7 Click **Open** (Windows) or **Choose for Upload** (Mac).

- 8 Click **Next**.

Result: The *Import contacts using a CSV file* window appears.

- 9 Check if the values of your CSV file are mapped with the right values in Bricsys 24/7.

- 10 Click **Import**.

Result: A pop up window informs you that the contacts are successfully imported from CSV.

5.2.4 Edit a contact

You can edit a contact:

- 1 Click **Address Book**  in the toolbar.

- 2 Select an address book in the tool menu.

- 3 Select a contact in the content pane.

- 4 Click **Edit contact**.

Result: The *Edit contact* window appears.

- 5 Edit the contact details.

- 6 Click **Edit**.

Result: A pop up window informs you that the contact is successfully edited.

Result: If applicable, click **Send notification** in the pop up window to inform users by email.

5.2.5 Transfer a contact

You can transfer a contact to another address book:

- 1 Click **Address Book**  in the toolbar.

- 2 Select an address book in the tool menu.

- 3 Select a contact in the content pane.

- 4 Click **Move contact**.

Result: The *Move* window appears.

- 5 Select the address book where you want to transfer the contact to.

- 6 Click **Move**.

Result: A pop up window informs you that the contact is successfully moved.



5.2.6 Create an organization

You can create a new organization:

1 Click **Address Book**  in the toolbar.

2 Click **New**.

Result: A context menu pops up.

3 Select **Organization**.

Result: The *Add organization* window appears.

4 Enter the organization details.

Note: The name of the organization is a required field.

5 Click **Add**.

Result: A pop up window informs you that the organization is successfully created.

5.2.7 Import an organization

You can import an existing organization from another project:

1 Click **Address Book**  in the toolbar.

2 Click **New**.

Result: A context menu pops up.

3 Select **Import organization**.

Result: The *Import from project* window appears.

4 Select the project.

5 Select the organization.

6 Tick the **Import organization members** checkbox if you also want to import the contacts of the selected organization.

7 Click **Import**.

Result: A pop up window informs you that the organization is successfully imported.

Result: If applicable, click **Send notification** in the pop up window to inform users by email.

5.2.8 Edit an organization

You can edit an organization:

1 Click **Address Book**  in the toolbar.

2 Select an address book in the tool menu.

3 Select an organization in the content pane.

4 Click **Edit organization**.

Result: The *Edit organization* window appears.

5 Edit the organization details.

6 Click **Save**.





Result: A pop up window informs you that the organization is successfully edited.

Result: If applicable, click **Send notification** in the pop up window to inform users by email.

5.2.9 Transfer an organization

You can transfer an organization to another address book.

- 1 Click **Address Book**  in the toolbar.
- 2 Select an address book in the tool menu.
- 3 Select an organization in the content pane.
- 4 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu appears.

- 5 Click **Move organization**.



Result: The *Move* window appears.

- 6 Select the address book where you want to transfer the organization to.
- 7 Enable **Include all organization members** if you also want to transfer the contacts of the selected organization.
- 8 Click **Move**.

Result: A pop up window informs you that the organization is successfully moved.

5.2.10 Download a vCard (electronic business card)

You can download a vCard:

- 1 Click **Address Book**  in the toolbar.
- 2 Select an address book in the tool menu.
- 3 Select a contact or an organization in the content pane.
- 4 If applicable, click the **ellipsis** button  at the top of the content pane.
- 5 Click **Download vCard**.

Result: A VCF (Virtual Contact File) is saved to your download folder.

5.3 Tasks


The **Tasks**  tool allows you to:

- create a new task for yourself or others (according to your access rights)
- consult the open tasks that are assigned to you
- consult the tasks that are overdue and assigned to you
- consult your completed tasks
- export your open or completed tasks



5.3.1 Create a task

You can create a task:



- 1 Click **Tasks**  in the toolbar.
- 2 Click **New task**.
Result: The *Create new task* window appears.
- 3 Enter a name for the new task.
- 4 If applicable, edit the assignee.
- 5 If applicable, add a description and a due date.
- 6 If applicable, attach documents from your project in Bricsys 24/7 and/or from your local device.
- 7 Click **Create**.

Result:

- A pop up window informs you that the task is created.
- The counter in the toolbar displays the number of open tasks.
- The assignee receives an email with a direct link to the task.

5.3.2 Consult, submit, or accept a task

You can consult, submit, or accept a task:


- 1 Click **Tasks**  in the toolbar.
- 2 Either click **Open tasks** in the tool menu to display your incomplete tasks, or click **Completed tasks** in the tool menu to display your finished tasks.
Note: Use the drop-down menus in the content pane to filter the tasks on folder or workflow.
- 3 If applicable, click on a column header to sort your tasks by **Name**, **Source**, **Assignee**, **Due date**, **Active since**, or **Completed on**.
- 4 If applicable, filter tasks on name or source with one of the filter  buttons.
- 5 Click on a task to view the task details.
- 6 Depending on the task status, you can:
 - Check the task details:
 - The starting date
 - The due date
 - The workflow the task is part of.
 - Click on the workflow name to open the workflow in the Bricsys 24/7 Workflow Viewer.
 - The assignee
 - Check the task history.
 - View the document the task is attached to:
 - i Click on the document name to open the document details
 - ii Click **Open in viewer** to open the document in the Bricsys 24/7 Viewer.
 - Set the document status.



- Add a comment if you want to clarify the task.
- Save the comment as a note.
- Either **attach documents** from the project or **attach files** from your local device.
- Accept the task for proposal and respond.
- Select one or more people to react on the task and submit.

5.3.3 Reassign a project member to a task

You can reassign a project member to a task:

- 1 Click **Tasks**  in the toolbar.
- 2 Click **Open tasks** in the tool menu to display your incomplete tasks.
- 3 Click on a task to open a window that displays the details for that task.
- 4 Depending on the task status, you can choose one or more assignees.
- 5 Click **Submit**.

Result: A pop up window informs you that the actor is successfully set.

- 6 Click **Reassign task**.

Result: The *Reassign task* window appears.

- 7 Select the applicable user, or perform a search.

Note: The reassignable user must have the same role membership as the assigned user.


- 8 Click **Reassign** to transfer the tasks.

Result: A pop up window informs you that the task is successfully reassigned.

- 9 Click the **X** icon to close the window.

5.3.4 Export open or completed tasks

You can export document details and revisions to an Excel file:

- 1 Click **Tasks**  in the toolbar.
- 2 Either click **Open tasks** in the tool menu to display your incomplete tasks, or click **Completed tasks** in the tool menu to display your finished tasks.
- 3 Click **Export to .xls**.



Result: An Excel file including the selected tasks is saved to your download folder.

5.4 Forms

The **Forms**  tool allows you to:

- build a form
- fill in a form
- search through form entries
- check the form history



- filter forms on, for example, name or date with one of the filter  buttons in the content pane
- view details with the  button
- send notifications.

A form is a prestructured file that allows a user to add information in a structured way. Once a form is created, a user can fill in the form. A record will be created and saved in Bricsys 24/7.

There are 4 ways to use forms:

- **Naming conventions**
Automatically generate a name for the document based on the filled in form. This gives your documents a structured name according to the naming convention for your project.
- **Metadata**
The metadata are displayed in the form and in the document details.
- **Attachment**
You can attach a form to a document to add extra information in a structured way. If a project member fills in the form, a record will be created and attached to the document.
- **Database**
You can fill in a form to build a database in a structured way.

5.5 Reports




The **Reports**  tool allows you to:

- review the progress and status of project tasks
- export task reports
- perform workflow auditing.

The available task statuses are: **Completed**, **Open**, **Overdue** and **Canceled**.


5.5.1 Overview of tasks by role

You can consult a detailed overview of tasks by role:

- 1 Click **Reports**  in the toolbar.
- 2 In the tool menu:
 - Click **Dashboard**  to see the top tasks.
 - Click **By Role**  so see all tasks.
- 3 Select the applicable role in the content pane.




Result: A list of tasks is displayed in the content pane.

Tip:

- Click on a column header to sort the items in that column.
- Filter tasks on name with the filter  button.

5.5.2 Overview of tasks by user

You can consult a detailed overview of tasks by user:



- 1 Click **Reports**  in the toolbar.
- 2 In the tool menu:
 - Click **Dashboard**  to see the top tasks.
 - Click **By user**  so see all tasks.
- 3 Select the applicable row in the content pane.

Result: A list of tasks is displayed in the content pane.

Tip: Click on a column header to sort the items in that column.

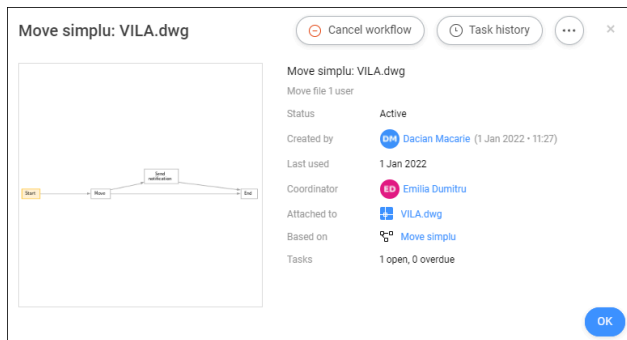
5.5.3 Overview of tasks by workflow

You can consult a detailed overview of tasks by workflow:

- 1 Click **Reports**  in the toolbar.
- 2 Click **By workflow**  in the tool menu.
Result: A summary of all tasks by workflow is displayed in the content pane.
- 3 Click on a workflow in the content pane to view the tasks associated with that workflow.


Tip: Click on a column header to sort the items in that column.

- 4 Learn more about a task:
 - Click on a task in the **Task** column to view the task details.
 - Click on a document in the **Source** column to view the document details.
 - Click on a task status in the **Status** column to view the workflow details.




- Click **Cancel workflow** to cancel the workflow.
Note: You need the appropriate rights.
- Click **Task history** to view the task history.
 - Click **Print to PDF** to print the task history to a PDF.
 - Click a contact to view the contact details.



- Click the **ellipsis** button  to:
 - Edit the workflow.
Note: You need the appropriate rights
 - Send a message.
 - View the workflow history.
- Click a contact to view the contact details.
Tip: Click **Send message** to send an email to your contact.

5.5.4 Export task statuses



You can export task statuses:

- 1 Click **Reports**  in the toolbar.
- 2 Select the applicable option (**By Role**, **By User** or **By Workflow**) in the tool menu.
- 3 Click **Export to .xls**.

Result: An Excel file including task statuses is saved to your download folder.

5.5.5 Export a report by folder

You can export a report by folder:

- 1 Click **Reports**  in the toolbar.
- 2 Click **By Folder**  in the tool menu.

Result: A detailed list of all folders is displayed, including:

- Number of items
- Number of owned items
- Number of items in subfolders
- Folder size.

- 3 Select the applicable folder in the content pane.
- 4 Click **Export to .xls**.

Result: The *Export to .xls* window appears.

- 5 Select the options you want to export.
- 6 Click **Download**.

Result: An Excel file including the selected options is saved to your download folder.

5.6 Work with relations

A relation is a tree structure that can be used as a field within a form to get a structured overview of your data.

The **Relations** tool allows you to:

- create new relations



- edit relations
- delete relations.

You can add a relation:

1 Click **Administration**  in the toolbar.

2 Click **Relations** in the tool menu.

3 Click **Add new relation** in the content pane,

Result: The *Add item* window appears.

4 Enter a name.

5 Add a description.

6 Set the access rights for all roles.

7 If applicable, tick **Upload CSV** to upload a CSV file with a predefined structure.

Result: A file upload field appears.

Result: Click on the field and select a CSV file, or drag and drop a CSV file.

Note: Make sure that all data is formatted correctly in the CSV file and that all required fields are added.


8 Click **Add**.

Result:

- A pop up window informs you that the folder is uploaded.
- The new relation is displayed in the content pane.

5.7 Administration

5.7.1 Overview

The **Administration**  tool allows project administrators to set up and manage the project environment. Only project administrators can see and use this tool.

The **Administration**  tool is divided into different categories:

- Project settings 

Enter or edit the basic information of a project, and change project settings.

- Project setup 

View, add or edit the project structure and access rights to roles per folder.

Synchronize to LetsBuild.







- Users 

View, invite, or delete users and assign roles to users.

- Roles 

View, import, copy, edit, or delete roles.



- Relations 
Manage relations.
- Administrators 
Specify to which sections an administrator has access.
- App access 
Enable or disable access by third-party apps to a project, and set permissions for roles.
- Form entries access 
View or edit the access rights to forms.
- Audit report 
Search for all activities in a project.
- Recycle bin 
Restore documents and folders from the recycle bin to your project, or permanently delete the items.

5.7.2 Project settings

Project settings allows the project administrator to:

- enter or edit basic project information
- change document settings and statuses
- change project settings
- lock the recycle bin
- deactivate or reactivate a project
- change the interface settings
- ask for support.

Project settings is divided into the sections:

- **Details**
- **Documents**
- **Administrators**
- **Preview features**

5.7.2.1 Deactivate a project


Deactivating a project:

- retains all project data and settings
- allows users to still enter the project and consult available data.

You can deactivate a project:

- 1 Select the project.



- 2 Click **Administration**  in the toolbar.
- 3 Click **Project settings** in the tool menu.
- 4 Click **Administrators**.
- 5 Click **Deactivate project**.

Result: The *Deactivate project* window appears.


- 6 Click **Deactivate** to confirm.

Result: Users can only view, download, and export data. Adding, editing, or deleting data is no longer possible.

Note: Only administrators can deactivate a project.

5.7.2.2 Reactivate a project

You can reactivate a project:


- 1 Select the project.
- 2 Click **Administration**  in the toolbar.
- 3 Click **Project settings** in the tool menu.
- 4 Click **Administrators**.
- 5 Click **Reactivate project**.

Result: The project is active again.

Note: Only administrators can reactivate a deactivated project.

5.7.2.3 Ask for support

You can report a problem:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project settings**.
- 3 Click **Support request**.
- 4 Click **New support request**.

Result: The *New support request* form appears.

- 5 Fill out all fields.
- 6 If applicable, add one or more attachments.
- 7 Click **Send Support Request**.

Result: A message informs you that the support request is submitted.

5.7.3 Project setup

Project setup:


- Displays all folders, subfolders, binders, forms, and workflows of a project, as set up by the project administrator.
- Allows to add (sub)folders and binders, for example address book and mail folders.



- Allows to edit folders.
- Allows to move and copy (sub)folders.
- Allows to give access rights to roles.
- You can select a folder and set the access rights per role.
- Allows to manage the project folder subscriptions.
- Allows to back up or restore access rights.
- Allows to consult overviews of folders forms and folders workflows.
- Allows to subscribe for updates.
- Allows to unsubscribe from updates.
- Allows to export folder access details.

5.7.3.1 Add a folder



You can add a folder:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click **Add folder** in the content pane to add a folder,
Result: The *Add folder* window appears.
- 4 Enter a name for the new folder.
- 5 Choose the default access rights for all roles.
- 6 Click **Add**.

Result: A pop up window informs you that the folder is successfully added.

5.7.3.2 Add a subfolder

You can add a subfolder:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Add folder**.
Result: The *Add new folder to* window appears.
- 6 Enter a name for the new folder.
- 7 If applicable, enter a description.
- 8 Enable or disable **Copy access rights from parent folder**.
- 9 Enable or disable **Copy metadata from parent folder**.
- 10 Enable or disable **Copy automatic workflows from parent folder**.




11 Click **Add**.

Result: Pop up windows inform you that the folder is successfully added, and that the enabled items are copied.

5.7.3.3 Edit a folder

You can edit a folder:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder in the content pane.
- 4 Click **Edit**.


Result: The *Edit folder* window appears.

- 5 Rename the folder.
- 6 If applicable, edit the description.
- 7 Click **Edit**.

Result: A pop up window informs you that the folder is edited.

5.7.3.4 Move a folder

You can move one or more folders:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder(s) in the content pane.
- 4 Click **Move**.



Result: The *Move folder* window appears.

- 5 Select the target folder.
- 6 Click **Move**.

Result: A pop up window informs you that the folder is moved.

5.7.3.5 Change the folders order

You can change the order of the folders.

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder(s) in the content pane.
- 4 Hover over  and drag and drop the folder to the desired position.



Note: You can only change the folder order if you are the project owner. If not, contact the project owner to obtain this right.

Result: A message appears that the folder has been moved.



5.7.3.6 Copy a folder

You can copy one or more folders:



- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder(s) in the content pane.
- 4 If applicable, click the **ellipsis** button  at the top of the content pane.
- 5 Click **Copy**.

Result: The *Copy folder* window appears.

- 6 Select the target folder.
 - 7 If applicable, enable **Include subfolders**.
 - 8 Click **Copy**.
- Result: A pop up window informs you that the folder is copied.

5.7.3.7 Delete a folder

You can delete one or more folders:


- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder(s) in the content pane.
- 4 If applicable, click the **ellipsis** button  at the top of the content pane.
- 5 Click **Delete**.

Result: A warning message appears to ask if you want to delete the folder(s).

- 6 Click **Delete**.
- Result: The folder(s) is/are deleted.

5.7.3.8 Add a binder

You can add a binder:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click **Add binder** in the content pane to add a binder.



Result: The *Add binder* window appears.

- 4 Enter a name for the new binder.
 - 5 If applicable, enable **Show only documents with status**.
Select the applicable statuses.
 - 6 Choose the default access rights for all roles.
 - 7 Click **Add**.
- Result: A pop up window informs you that the binder is successfully added.



5.7.3.9 Add metadata



You can add metadata:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Add metadata**.
Result: The **Add metadata** window appears.
- 6 Select a form to add its input fields to newly uploaded documents.
- 7 Choose between **Document** and **Revision**.
- 8 If applicable, enable **Apply this extra data (form) to all subfolders of this folder**.
- 9 If applicable, enable **Rename uploaded documents based on the fields' content**.
Select the field separator you want to use from the drop-down menu.
Note: This allows the creation of revisions.
- 10 If applicable, enable **Use default values**.
Click **Edit default values**, if you want to edit the default values in the *Set default values* window.
Click **Confirm** to save the changes.
- 11 Click **Confirm**.

Result: A pop up window informs you that the metadata are successfully added.

5.7.3.10 Attach a workflow to a folder

You can attach a workflow to a folder:



- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Attach workflow**.
Result: The *Attach workflow* window appears.
- 6 Choose a workflow.
- 7 Select a coordinator.
- 8 If applicable, enable **Apply this workflow to all subfolders of this folder**.
- 9 If applicable, enable **Start this workflow also when a version is uploaded**.
If applicable, enable **Cancel previous workflow when adding a revision**.
- 10 Click **Attach**.



Result: A pop up window informs you that the workflow is successfully attached to the folder.

5.7.3.11 Edit an attached workflow



You can edit an attached workflow.

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click on the applicable workflow  icon next to a folder in the content pane.
Result: The *Edit attached workflows* window appears.
- 4 Adjust the applicable settings.
- 5 Click **Confirm**.

Result: A pop up window informs you that the workflow is successfully edited.

5.7.3.12 Remove an attached workflow



You can remove an attached workflow:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click on the applicable workflow  icon next to a folder in the content pane.
Result: The *Edit attached workflows* window appears.
- 4 Click the **X** icon next to the workflow you want to remove.
Result: The *Detach workflow* window appears.
- 5 If applicable, enable **Detach this workflow from all subfolders of this folder**.
- 6 Click **Detach**.

Result: A pop up window informs you that the workflow is successfully detached from the folder.

5.7.3.13 Subscribe for updates

You can subscribe for updates:



- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the folder you want to be notified about.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu appears.
- 5 Click **Subscribe for updates**.

Result: A pop up window informs you that all users are subscribed.



5.7.3.14 Sync to LetsBuild

You can synchronize between Bricsys 24/7 and the third-party app LetsBuild:




- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Select the applicable folder in the content pane.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu appears.
- 5 Click **Sync to LetsBuild**.
Result: The *Sync folder: Documents* window appears.
- 6 Enter your LetsBuild **Username** and **Password**.
- 7 Click **Next** to set up and use synchronizations.
- 8 Select a project and a folder.
- 9 Click **Sync**.






Result:


- A pop up window informs you that one folder is synced to LetsBuild.
- A sync icon is added to the folder in the content pane.




5.7.3.15 Edit folder access

You can toggle between the access rights:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Set the permissions by **Type** and **Role**.
- 4 Click on the different access type icons to set a specific access type.
As an alternative, use the arrow icons   to toggle between the access rights.

| Icon | Description |
|---|---------------------|
|  | View |
|  | Print |
|  | Download |
|  | Add |
|  | Add revision |

| Icon | Description |
|---|------------------------|
|  | Annotate |
|  | Edit |
|  | Delete |
|  | Attach workflow |
|  | Add subfolder |
|  | Share |
|  | Attach form |

| Icon | Access type | Description |
|---|-------------|--|
|  | no access | |
|  | access own | rights to objects created or uploaded by the user in the specific folder |
|  | access all | rights to all objects in the specific folder |


- 5 Click **Save changes**.

Result: A pop up window informs you that the folder access changes are saved.

Note: Depending on the type of folder, not all access types might be available.

5.7.3.16 Edit project subscriptions

You can manage the folder subscriptions of the project:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click **Project subscriptions**.

Result: The *Project folder subscriptions* window appears.

- 4 Select and/or deselect subscription folders and subfolders.
- 5 If applicable, delete subscriptions in the **Folder subscriptions overview**.





- 6 If applicable, adjust the time slot for the notifications.
- 7 Click **Save**.

Result: A pop up window informs you that the subscriptions are updated.

5.7.3.17 Create a snapshot

You can create a snapshot to back up the current state of access rights:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu appears.

- 4 Click **Save snapshot**.



Result: The *Save snapshot* window appears.

- 5 Enter a snapshot name.
- 6 Click **Add snapshot**.

Result: A pop up window informs you that the snapshot is saved.

5.7.3.18 Revert to a snapshot

You can revert to a snapshot to restore access rights:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu appears.

- 4 Click **Revert to snapshot**.



Result: The *Revert to snapshot* window appears.

- 5 Select the applicable snapshot.
- 6 Click **Revert**.

Result: A pop up window informs you that the folder access is reverted.

5.7.3.19 Consult the folders forms overview

You can consult the folders forms overview:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu appears.

- 4 Click **Folders forms overview**.


Result: The *Folders forms overview* window appears.



Tip:

- Click on a column header to sort the items in that column.
- Filter the list with one of the filter ▾ buttons.
- Click on a form name to open a preview of the form.
- The number of forms is displayed.

5 If you want to edit an attached form:

- a Hover over a form.
- b Click the **Edit**  icon.

The *Edit metadata: Attached form name* window appears.

- c Select and/or edit your preferred settings.
- d Click **Confirm**.

6 If you want to remove an attached form:

- a Hover over a form.
- b Click the **X** icon.

The *Detach form* window appears.



- c Click **Detach** to confirm.

A pop up window informs you that the link is removed.

7 Click **Close** to close the window.

5.7.3.20 Consult the folders workflows overview

You can consult the folders workflows overview:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu appears.


- 4 Click **Folders workflows overview**.

Result: The *Folders workflows overview* window appears.

Tip:

- Click on a column header to sort the items in that column.
- Filter the list with one of the filter ▾ buttons.
- Click on a workflow name to open the workflow in the Bricsys 24/7 Workflow Viewer.
- The number of workflows is displayed.

5 If you want to edit an attached workflow:

- a Hover over a workflow.
- b Click the **Edit**  icon.

The *Edit attached workflow to folder* window appears.



- c Select your preferred settings.



- d Click **Save**.
A pop up window informs you that the workflow is successfully attached to the folder.
- 6 If you want to remove an attached workflow:
 - a Hover over a workflow.
 - b Click the **X** icon.
The *Detach workflow* window appears.
 - c If applicable, enable **Detach this workflow from all subfolders of this folder**.
 - d Click **Detach** to confirm.
A pop up window informs you that the workflow is successfully detached from the folder.
- 7 Click **Close** to close the window.


5.7.3.21 Consult the LetsBuild synchronized folders overview

You can consult an overview of folders synchronized between Bricsys 24/7 and LetsBuild:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu appears.
- 4 Click **Synced folders overview**.
Result: The *LetsBuild synchronized folders overview* window appears. The number of synced folders is displayed.
Tip: Click on the column header to sort the folders.
- 5 If you want to unsync a folder:
 - a Hover over a folder.
 - b Click the **X** icon.
The *Unsync folder* window appears.
 - c Click **Unsync** to confirm.
- 6 Click **Close** to close the window.

5.7.3.22 Export folder access

You can export folder access details to an Excel file:


- 1 Click **Administration**  in the toolbar.
- 2 Click **Project setup**.
- 3 Click **Export to .xls**.
Result: An Excel file including the folder access details is saved to your download folder.

5.7.4 Users

Invite users to the project and make them a member of certain roles.




5.7.4.1 Export a user list

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Click **Export to .xls**.

Result: An Excel file including users and roles is saved to your download folder.

5.7.4.2 Edit a user

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click **Edit user**.

Result: The *Edit user* window appears.


- 5 Edit the details you want to update.

Note: First name, last name, email address, and role are required fields.

- 6 Click **Save changes**.

Result: A pop up window informs you that the contact is successfully edited.

5.7.4.3 Assign a role to a user

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click **Assign roles**.



Result: The *Assign roles* window appears.

- 5 Tick or untick the role(s) you want to apply to the user.

- 6 Click **Assign**.

Result: A pop up window informs you that the roles are successfully edited.

5.7.4.4 View the permissions of a user

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click the ellipsis button  at the top of the content pane. A context menu pops up.
- 5 Click **View permissions**.



Result: The permissions for the selected user appear.

- 6 Scroll down the list to view all folders.

- 7 Click **Close** to close the window.





5.7.4.5 Add a user to an address book

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Add to address book**.
Result: The *Add user(s) to address book* window appears.
- 6 Select the address book you want to add the user to.
- 7 Click **Add**.



Result: A pop up window informs you that the user is added to the address book.

5.7.4.6 Resend an invitation email

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Resend invitation mail**.
Result: The *Send account* window appears.
- 6 If applicable, enter a message to be included in the invitation email.
- 7 Click **Submit**.

Result: A pop up window informs you that an invitation mail is sent.



5.7.4.7 Delete a user

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Delete**.
Result: The *Delete user* window appears.
- 6 Click **Delete** to delete this user.

Result: A pop up window informs you that the user is successfully removed.




5.7.4.8 Reassign tasks

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Select a user.
- 4 Click the **ellipsis** button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Reassign tasks**.
Result: The *Reassign tasks* window appears.
- 6 Select the applicable user, or perform a search.
Note: The reassignable user must have the same role membership as the assigned user.
- 7 Click **Reassign** to transfer the tasks.
Result: A pop up window informs you that the tasks are successfully reassigned.

5.7.5 Roles

Roles  allows you to:


- view roles
- sort role names
Tip: Click on a column header to sort the items in that column.
- filter roles on name with the filter buttons  in the content pane
- add, edit, or delete roles
- categorize specific project members into a role and manage the access rights.

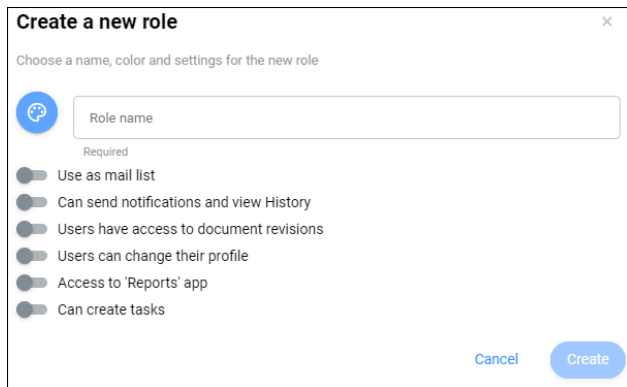
Different roles can be set up per project. Typical examples of roles are:

- Administrators
- Architects
- Engineers
- Contractors.

5.7.5.1 Create a role

You can create a new role:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Click **New role**.
Result: The *Create a new role* window appears.



4 Enter a name for the new role.

5 Click  and select a color.

Tip: Selecting different colors for different roles, makes it easier to distinguish annotations from different roles.

6 Enable or disable the settings:

- **Use as mail list**

This allows to send messages to all project members with the role.

- **Can send notifications and view History**

This allows to send notifications to other project members and to view the history.

- **Users have access to document revisions**


Project members can view the revisions of a document.

- **Users can change their profile**

Project members can edit their profile settings.

Note: This setting is recommended.

- **Access to 'Reports' app**

Users can access the **Reports**  tool.

- **Can create tasks**

Users can create tasks.

7 Click **Create**.

Result: The *Assign users* window appears.

8 If applicable, assign existing or new users to the role:

- Enter the email address of a user.

- Click .

The contact appears in the contact pane.

- If applicable, add another user.

9 If applicable, enable **Send invitation mail**.


10 Click **Add users** to confirm, or click **Skip this step** if you do not want to assign users to the role.



Result: The new role is displayed in the content pane.

5.7.5.2 Import a role

You can import a role from another project:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Click **Import role**.

Result: The *Import role* window appears.

- 4 Enter the name of an existing role in another project.

Result: The roles appear.


- 5 Select the role you want to import.
- 6 If applicable, enable **Import members** to import members with the role.
- 7 Click **Import**.

Result: A pop up window informs you that the role is successfully imported.

Note: Folder access rights are not copied while importing a role/member.

5.7.5.3 Edit a role

You can edit a role:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Select a role in the content pane.
- 4 Click **Edit role**.

Result: The *Edit role* window appears.

- 5 Edit the applicable role details:
 - Color
 - Role name
 - Assign users to the role:
 - i Search for project members.
 - ii Select the applicable project members.
 - Enable or disable **Use as mail list**.
 - Enable or disable **Can send notifications and view History**.
 - Enable or disable **Users have access to document revisions**.
 - Enable or disable **Users can change their profile**.
- Note:** This setting is recommended.
- Enable or disable **Access to 'Reports' app**.
 - Enable or disable **Can create tasks**.


- 6 Click **Edit**.



Result: A pop up window informs you that the role is successfully updated.

5.7.5.4 Show folder access



You can view the folder access:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Select a role in the content pane.
- 4 Click **Show folder access**.

Result: The Project setup content pane displays the permissions by folder for the selected role.

5.7.5.5 Copy a role

You can copy a role:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Select a role in the content pane.
- 4 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Copy role**.


Result: The *Copy role* window appears.

- 6 Enter a role name.
- 7 Edit the applicable role details:
 - Enable or disable **Use as mail list**.
 - Enable or disable **Can send notifications and view History**.
 - Enable or disable **Users have access to document revisions**.
 - Enable or disable **Users can change their profile**.
 - Enable or disable **Access to 'Reports' app**.
 - Enable or disable **Can create tasks**.
 - Enable or disable **Copy role access rights**.
 - Enable or disable **Copy role members**.
- 8 Click **Copy**.

Result: A pop up window informs you that the role is successfully copied.

5.7.5.6 Delete a role

You can delete a role:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Roles**.
- 3 Select a role in the content pane.



4 Click the **ellipsis** button  at the top of the content pane.

Result: A context menu pops up.

5 Click **Delete**.

Result: The *Delete roles* window appears.

6 Click **Delete** to delete this role.

Result: A pop up window informs you that the role is deleted.

5.7.6 Administrators

Manage the project administrators and define the categories a project administrator has access to.

Important: The project owner always has access to all categories.

5.7.6.1 View the project owner and administrators

You can view the project owner and administrators:

1 Click **Administration**  in the toolbar.

2 Click **Administrators** in the tool menu.

The project owner and administrators are displayed in the content pane.

5.7.6.2 Manage the project administrators

You can manage the project administrators:

1 Click **Administration**  in the toolbar.

2 Click **Administrators**.

3 Click **Manage admins**.

The *Manage admins* window appears.

4 Manage the project administrators:

- Search for project members.
- Select the option button for each project member you want to assign as a project administrator.
- Deselect the option button for each project member you want to unassign as a project administrator.

5 Click **Update**.

A pop up window informs you that the role is successfully updated.

5.7.6.3 Edit permissions for 1 administrator

You can allow or remove administrator permissions:

1 Click **Administration**  in the toolbar.

2 Click **Administrators**.



- 3 Select an administrator in the content pane.
- 4 Click **Permissions**.

The *Set permissions* window appears. The name of the administrator is displayed.


- 5 Edit the applicable permissions:
 - Enable or disable **Project settings**.
 - Enable or disable **Project setup**.
 - Enable or disable **Manage users & roles**.
 - Enable or disable **Manage administrators**.
 - Enable or disable **Audit reports**.
 - Enable or disable **Recycle bin**.
 - Enable or disable **Form access**.
 - Enable or disable **Manage apps**.

- 6 Click **Save**.

A pop up window informs you that the admin rights are successfully edited.

5.7.6.4 Edit permissions for multiple administrators

You can allow or remove administrator permissions:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Administrators**.
- 3 Select multiple administrators (indicated by **Permissions**) in the content pane.
- 4 Click **Edit permissions**.

The *Set permissions* window appears. The number of selected administrators is displayed.

- 5 Edit the applicable permissions:
 - Enable or disable **Project settings**.
 - Enable or disable **Project setup**.
 - Enable or disable **Manage users & roles**.
 - Enable or disable **Manage administrators**.
 - Enable or disable **Audit reports**.
 - Enable or disable **Recycle bin**.
 - Enable or disable **Form access**.
 - Enable or disable **Manage apps**.

- 6 Click **Save**.

Pop up windows inform you that the admin rights are successfully edited.



5.7.7 App access

App access  allows you to:

- enable or disable access by third-party apps to a project
- set permissions for roles.




5.7.8 Form entries access


Form entries access  allows you to:


- edit form access
- export to an Excel file
- upload a CSV file.


5.7.8.1 Edit form access

You can toggle between the access rights:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Form entries access**  in the tool menu.
- 3 Select the applicable **Role** next to **Set permissions for**.
- 4 Click on the arrow icon  next to the applicable form in the content pane.
Result: All relevant form fields appear.
- 5 Click on the different access type icons to set a specific access type.

Full access: 

No access: 



Tip: As an alternative, use the arrow icons  to toggle between the access rights.

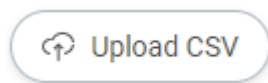
- 6 Click **Save changes**.

Result: A pop up window informs you that the changes are saved successfully.

5.7.8.2 Upload a CSV file

You can upload a CSV file:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Form entries access**  in the tool menu.
- 3 Select the applicable form in the content pane.



- 4 Click **Upload CSV**

Result: The *Upload CSV* window appears.



5 Click **Select a CSV file...**

Result: A modal window appears.

6 Select the CSV file you want to upload.

7 Click **Open** (Windows) or **Choose for Upload** (Mac).

Result: The selected CSV file name is displayed in the *Upload CSV* window.

8 Click **Next**.

9 Check if the values of your CSV file are mapped with the right values on Bricsys 24/7.

10 Click **Import**.

Result: A pop up window informs you that the repository table action is done.

5.7.9 Audit report

Administrators can perform an audit:

1 Click **Administration**  in the toolbar.

2 Click **Audit report** .

3 Select the relevant search criteria:

- **Period**
- **User**
- **Action**
- **Item type**

4 Click **Search** to start an audit report.

Result: All relevant project activities are displayed in the content pane.

5.7.10 Recycle bin

All documents and folders that are deleted in Bricsys 24/7 are moved to the recycle bin first (soft delete).

In the recycle bin, you can still restore items, or delete the items permanently (hard delete).

Only administrators have access to the recycle bin.

Important: In order to delete items in the recycle bin, the option **Lock recycle bin** can not be enabled.

5.7.10.1 Restore a document or folder

You can restore an item:

1 Click **Administration**  in the toolbar.

2 Click **Recycle bin** .

3 Select a document or folder in the content pane.

4 Click **Restore item**.

The *Restore item* window appears.



5 Click **Restore** to restore the item.



The item is restored to the original folder or project.

5.7.10.2 Delete an item

You can delete an item:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Recycle bin** .
- 3 Select an item in the content pane.
- 4 Click **Delete forever**.



The *Delete forever* window appears.

- 5 Click **Delete** to delete the item.

The item is permanently deleted.

5.7.10.3 Delete all items

You can delete all items at once:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Recycle bin** .
- 3 Click **Empty bin**.

The *Empty bin* window appears.

- 4 Click **Confirm** to empty the recycle bin.

The items are permanently deleted.

5.8 Bricsys 24/7 Transfer Tool

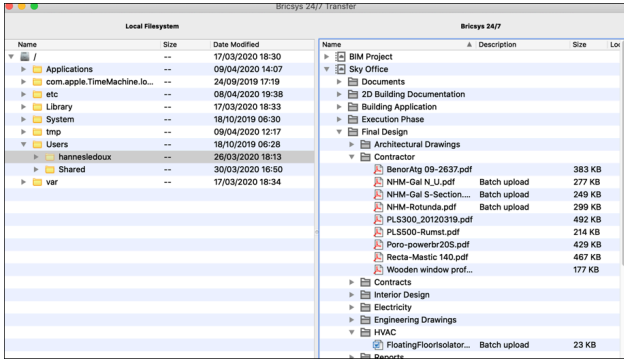
The Bricsys 24/7 Transfer Tool is a local desktop application with extended Bricsys 24/7 functionality and allows you to:

- Transfer folder structures
- Transfer documents
- Open, edit and revise documents
- Synchronize folders.

You can download the tool for Windows or macOS [here](#).

5.8.1 Transfer folder structures

You can transfer folders or complete folder structures (with or without documents) between your local file system and the Bricsys 24/7 service. The split screen user interface allows you to upload or download folders or folder structures via drag and drop.



5.8.2 Transfer documents

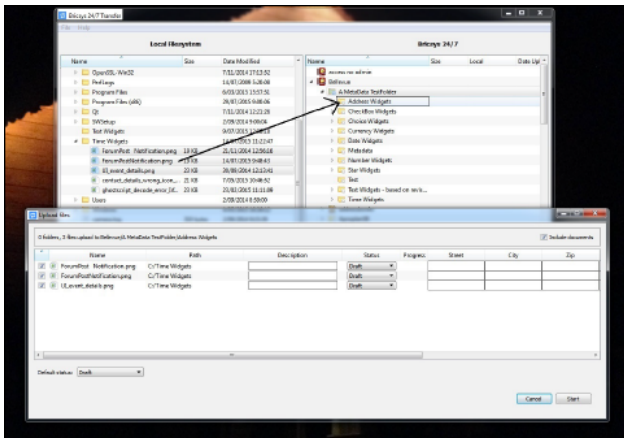
You can transfer multiple documents between your local file system and the Bricsys 24/7 service. The split screen user interface allows you to upload or download documents via drag and drop.

The following example explains how to upload documents to Bricsys 24/7 folders that have form(s) attached to them.

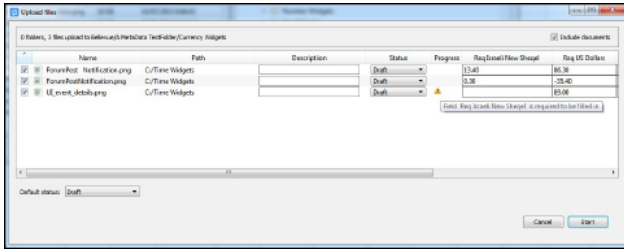
CAUTION: Providing metadata is only possible when uploading to a single Bricsys 24/7 folder.

When you try to upload documents to multiple folders, the extra fields of the attached forms will not show.

In the example 3 files are dragged to the **Address Widgets** folder. This folder has a form attached, which contains an address widget. The **Upload files** dialog box shows additional input fields for each file representing the fields of the form.



When you start the upload, the metadata information is validated. In the example, the upload does not start because the metadata of file **UI_event_details.png** is invalid. This is indicated by the warning icon in the **Progress** column of the file. The field **Req Israeli New Sheqel** is empty. However, this field is required. The upload will not start as long as there are invalid metadata values.

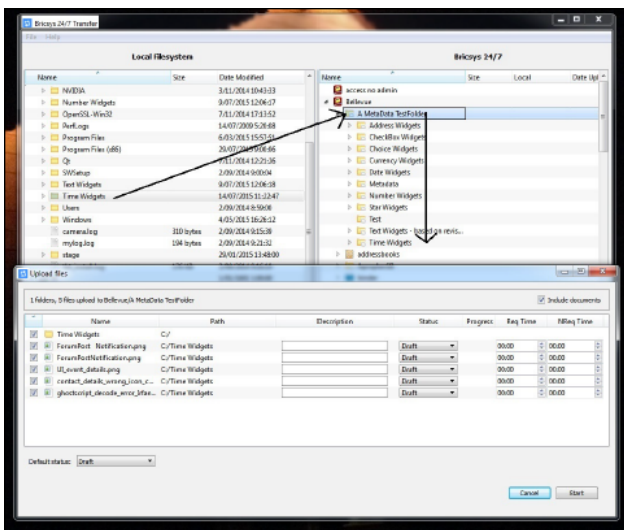


You can also drag a local folder to the parent Bricsys 24/7 folder of the Bricsys 24/7 folder that has the same name.

In the example, the local **Time Widgets** folder is dragged to the **A MetaData TestFolder** folder.

The **A MetaData TestFolder** folder has a subfolder with the same name as the local folder, **Time Widgets**.

The Bricsys 24/7 Transfer Tool checks if this folder has a form attached to it. In this case it does.



Instead of filling out the metadata yourself, it can also be read from a **metadata.xlsx** file.

The format rules of this xlsx file are the following:

- Cell **A1** is empty.
- Cells in xlsx files contain formatting. Formatting of all cells must be set to *Text*.
Usually, the editor uses number/date/... formatting automatically.
CAUTION: If not set to *Text*, the Bricsys 24/7 Transfer Tool will not read the data correctly.
- Cells **A2-A...** contain the names of the files you want to automatically fill out the metadata off.
- Cells **B1-...1** contain the names of the fields of the forms you want to automatically fill out with values.
- The textual format of the values must be the same as seen in the web interface of Bricsys 24/7 with some exceptions:
 - Date: dd/MM/yyyy
 - Time: hh:mm
 - Checkbox: yes/true or no/false/empty
 - Choice: the value string of the choice



- Number/Currency: numbers use '.' as separator
- Rating: star rating is indicated by number 1-5

To read the metadata values from the **metadata.xlsx** file, add it to your upload selection. Either select it with the other files you want to upload, or make sure that the folder you select contains it.

When the **metadata.xlsx** file is detected, you will see the **Link metadata.xlsx headers to Field Names** dialog box before seeing the **Upload files** dialog box.

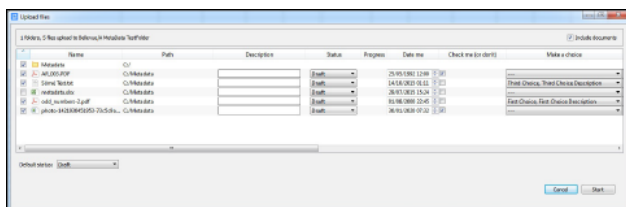


The Bricsys 24/7 Transfer Tool tries to match all field name headers provided in the **metadata.xlsx** file with the fields in the form(s) attached to the Bricsys 24/7 folder.

In this case there is no typo, and all the headers match with the correct fields. However, the warning triangle indicates a problem. There are 2 headers with the name 'Country'. The Bricsys 24/7 Transfer Tool can not determine which 'Country' header matches which 'Country' form field. The form 'All Widgets' contains a field named 'Country' and so does the form 'metadata revision test'.

To resolve the problem:

- 1 Set the second 'Country' header to match with the 'Country' form field of the 'metadata revision test' form attached to the Bricsys 24/7 folder.
- 1 The *Upload files* dialog box displays the filled in metadata.
- 2 Click **Start** to upload the files.

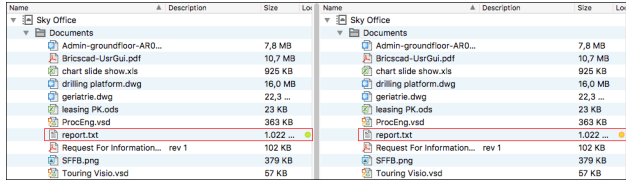


Note: For more information, see the [Metadata template](#).

5.8.3 Open, edit and revise a document

You can open a document from the Bricsys 24/7 Service on your device. This allows you to edit the document immediately and upload it directly to Bricsys 24/7 as a revision:

- 1 Double-click on a document in the Bricsys 24/7 screen to save and open a copy on your local device.
- 1 A green dot appears next to the file name.



- 2 Edit and save the document on your local device.
- 3 An orange dot appears next to the file name.
- 4 Right-click on the edited document and select the **upload as revision** action to upload the edited document as a revision of the original document in Bricsys 24/7.

Document status

| Item | Description |
|---------------|--|
| A dot | A copy of the document from Bricsys 24/7 is available on your local device. |
| A green dot | The document stored on your local device is identical to the document on Bricsys 24/7. |
| An orange dot | The document stored on your local device is different from the document on Bricsys 24/7. |

5.8.4 Synchronize folders

The advantages of using synchronizations:

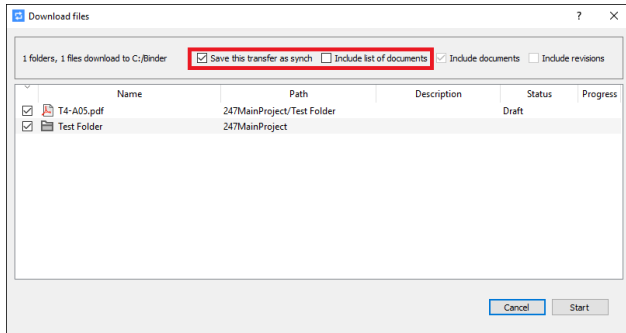
- The settings are saved. There is no need to drag and drop every time. Just click once to synchronize.
- The synchronizations happen fast as only the changes are transferred.
- There are no overrides, no data is ever lost.
- Everything at the source is also available at the destination.

You can set up transfer synchronizations:

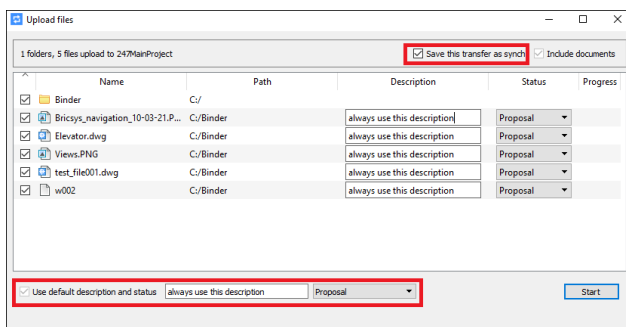
- 1 Drag and drop folders from left to right and vice versa.
- 1 The *Upload files* and *Download files* dialog boxes are opened.
Both these dialog boxes contain the option **Save this transfer as synch**.
- 2 Tick the **Save this transfer as synch** checkbox(es) to synchronize the folder you want to upload or download.

The synchs are saved.

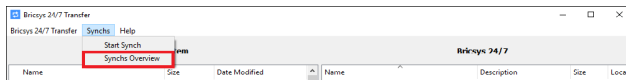
- In the *Download files* dialog box, you can select **Include list of documents** to download an Excel file containing all documents with their metadata.



- In the *Upload files* dialog box, you can enter a **default description and document status**.

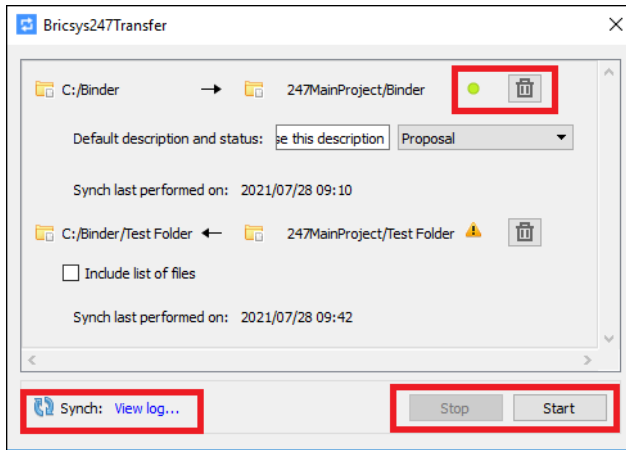


- Revise the synchs in the **Synchs > Synchs overview** menu.



- Click the **Synchs > Start synch** action to automatically transfer the changes between Bricsys 24/7 and your local device.

In the *Bricsys 24/7 Transfer* dialog box you can see the **settings** of all saved synchs.

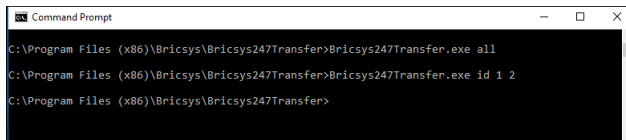


- A green dot indicates that the synch is valid and can be run.
- The local and Bricsys 24/7 folders still exist and you have user access rights.
- If you no longer need a synch, click on the **recycle bin** icon to delete it.
Note: This will not delete any local files or Bricsys 24/7 documents.
- At the bottom right corner, you can start and stop the synchronization of all synchs.
- At the bottom left corner, click **View log** to display the *synch log*.

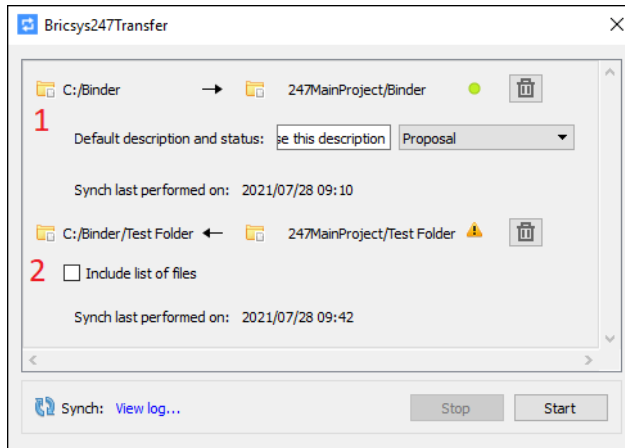
5.8.5 Run synchs from the Command Prompt

As an alternative, you can run the saved synchs from the **Windows Command Prompt**:

- 1 Navigate on the command line to where Bricsys247Transfer.exe is located.
- 2 Run Bricsys247Transfer.exe followed by a space and then choose between all or id.
 - If you choose all, nothing needs to be added. All saved synchs will run.
 - If you choose id, add a space and then the id of the synch you want to run, followed by a space and the other id you want to synchronize.



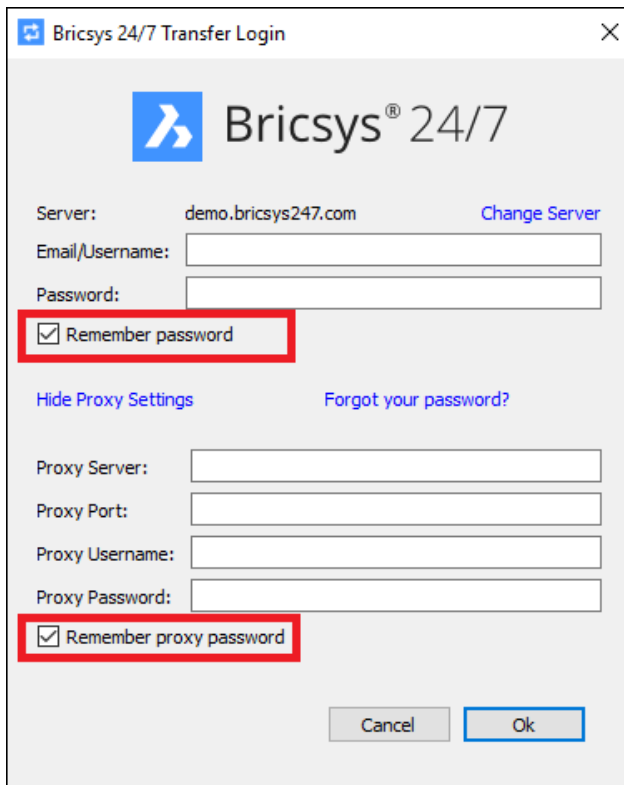
The ids of the synch are the order in which they are displayed in the *Bricsys 24/7 Transfer* dialog box.



3 Check the output in the log file located at:

4 `C:\Users\[username]\AppData\Local\Chapoo\ChapooTransfer\synch_log.txt`.

Note: If you want to synchronize via the **Windows Command Prompt**, all login credentials must be saved in the *Transfer Login* dialog box.



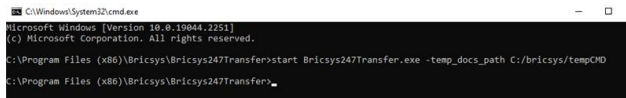


5.8.6 How to configure the location for the temporary folder for the Bricsys 24/7 Transfer Tool

You can configure the location for the temporary folder for the Bricsys 24/7 Transfer Tool using one of the following options:

- **Using the Command line**
 - a Open the terminal to the installation folder, at the following path: `C:\Program Files (x86)\Bricsys\Bricsys247Transfer`
 - b In the terminal, type **start Bricsys247Transfer.exe -temp_docs_path C:/bricsys/temp** and press the Enter key.

Bricsys 24/7 Transfer Tool should open. The opened file(s) from Transfer Tool will be saved in the folder created in this location: `C:/bricsys/temp`.



- **Using the .config file**

To do this, you need edit the configuration file located at `C:\Users\[username]\AppData\Local\Chapoo\ChapooTransfer`.

- a Open it using a text editor, like Notepad++
- b Add the line **tempDocsPath=C:/bricsys/not-temp**
- c Save the file.

Open Bricsys 24/7 Transfer Tool, open a file from the project. The opened file(s) will be saved in the folder created in this location: `C:/bricsys/not-temp`

- **Using the shortcut**
 - a Create a shortcut to the `Bricsys247Transfer.exe` on the Desktop.
 - b Right-click on the shortcut and select the **Properties** option.
 - c Add **"C:\Program Files (x86)\Bricsys\Bricsys247Transfer\Bricsys247Transfer.exe" -temp_docs_path "C:/bricsys/temp"** in the Target field and apply the changes.
 - d Open the Bricsys 24/7 Transfer Tool using this shortcut. The opened file(s) will be saved in the folder created in this location: `C:/bricsys/temp`.

5.9 Bricsys 24/7 mobile app

The Bricsys 24/7 mobile app allows you to:

- Upload, view, comment and markup 2D drawings, spreadsheets, pictures, and other documents.
- Consult your up-to-date projects and tasks anywhere.
- Use over 70 file formats.

You can download the app on the [Google Play](#) or on the [App Store](#).

Tip: Users can also log in on a mobile device via the [Bricsys 24/7 login page](#) in any supported mobile web browser.



To start the 24/7 mobile app, tap the 24/7 icon on your mobile device.

5.9.1 Projects list

The projects list displays when opening the mobile app on your mobile device.


- Tap **BY ORGANISATION** to list the projects by organisation.
- Tap **ALPHABETICAL** to list the projects alphabetically.

To open a project from the list, choose between these actions:


- Tap a project in the list.
- Enter a project name in the search bar.
Tap a project in the filtered project list.

The project opens.

Note: If the project administrator has enabled **two-factor authentication** for the project, you need to enter a token from your token card to log in to the project.

Note: When you're inside a project, tap  to return to the projects list.

5.9.2 Documents

Inside a project, **Document**  displays a list of all documents in a project folder.

- 1 Tap **RECENT** to view a list of the most recent documents.
- 2 Tap **ALL** to view a list of all documents in a project.




You can

- upload
- view
- consult
- edit
- download
- delete

a document.

5.9.2.1 Upload a document

You can upload one or more documents:

- 1 Open the folder where you want to upload the document(s).
- 2 Tap .
- 3 Tap  **Device** to upload the document(s) from your device.
Tap  **Camera** to take a photo on your mobile device.
- 4 Enter the metadata.




5 Tap **Upload**.

5.9.2.2 View a document

There are two ways to view a document:

1 Tap a document in the documents list.

Or

1 Tap  on the right side of the document in the documents list.

2 Tap  **View**.

The document opens.

5.9.2.3 Add an annotation

Annotations allow you to comment on a specific area of a document.

1 Tap a document in the documents list.

The document opens.

2 Tap .

3 Drag the red square to the location you want to annotate.

4 Tap **Subject**.

- Enter a subject
- (option) Enter a description.
- (option) Add an attachment.

5 Tap **Post**.

5.9.2.4 Document information


There are two ways to open the document information:

1 Tap a document in the documents list.

The document opens.

2 Tap .

Or

1 Tap  on the right side of the document in the documents list.

2 Tap  **Show details**.

The document information displays. It contains three tabs:

- **INFO** shows the document details.
- **ANNOTATIONS** shows the annotations of the document.
- **TASKS** shows the automated actions attached to the file. In the web version, you can create automated tasks by using workflows.



5.9.2.5 Edit a document

There are two ways to edit a document's details:

- 1 Tap a document in the documents list.
The document opens.
- 2 Tap ⓘ.
The document details open.
- 3 Tap ⋮ on the top right of the document.
- 4 Tap ✎ **Edit document**.

Or

- 1 Tap ⋮ on the right side of the document in the documents list.
- 2 Tap ✎ **Edit document**.

You can edit the document details:

- Name
- Status
- Description

Tap **Save**.

5.9.2.6 Download a document

There are two ways to download a document on your mobile device:

- 1 Tap a document in the documents list.
The document opens.
- 2 Tap ⓘ.
The document details open.
- 3 Tap ⋮ on the top right of the document.
- 4 Tap ⬇️ **Download**.

Or

- 1 Tap ⋮ on the right side of the document in the documents list.
- 2 Tap ⬇️ **Download**.

The document is saved to your download folder.

5.9.2.7 Delete a document

There are two ways to download a document on your mobile device:

- 1 Tap a document in the documents list.



The document opens.

2 Tap ⓘ.

The document details open.

3 Tap ⋮ on the top right of the document.

4 Tap 🗑️ **Delete**.

Or

1 Tap ⋮ on the right side of the document in the documents list.

2 Tap 🗑️ **Delete**.

The document is deleted.

5.9.3 Tasks

Inside a project, **Tasks** 📅 allows you to:

- create a new task for yourself or others (according to your access rights)
- consult the open tasks that are assigned to you
- add or respond to a comment
- edit or delete an existing task

5.9.3.1 Create a task

To create a task, proceed as follows:

1 Tap ⊕.

2 Enter a name.

3 (optional) Enter a description.

4 Select an assignee. By default, the task is assigned to the current user, however a task can also be assigned to another user from the list.

5 (optional) Select a due date.

6 (optional) Add one or more attachment. Options for uploading an attachment:

- You can upload one (or more) image(s) taken with the camera (if available) directly.
- You can upload one (or more) image(s) from the camera roll / picture gallery.
- You can upload one (or more) file(s) from the device.
- You can attach one (or more) document(s) in the current project through a project files browser.


7 Tap **Create**.

As soon as a task is created and assigned to a user, it is added to the My Tasks tab of this user. The badge which shows the number of assigned tasks is incremented.



5.9.3.2 Consult, comment on, edit or delete a task

1 Consult a task

- 1 Tap **Tasks** .
- 2 Click on a task to view the task details.
- 3 Click **Resolve** to resolve the task. After this, the task will no longer display in the Tasks list.

2 Comment on a task

- 1 Tap **Comments**.
- 2 Type the comment in the comment field and tap **Post**.


3 Edit a task

- 1 Tap **⋮** next to the task and tap **Edit**.
- 2 Edit the name, the description, the assignee, the due date and/or the attachment(s).
- 3 Tap **Edit**.

4 Delete a task

- 1 Tap **⋮** next to the task and tap **Delete**.
- 2 A warning displays asking for confirmation.
- 3 Tap **Cancel** to cancel the deletion, tap **Delete** to delete the task.


5.9.4 Contacts

Inside a project, **Contacts**  gives an overview of all the contacts in the address book of in the current project.

- Tap **ALPHABETICALLY** to display the contacts in alphabetic order.
- Tap **BY ORGANISATION** to display the contacts by organisation.

Tap a contact to view the details.

5.9.5 Profile

Inside a project, tap **Profile**  to view the current user's profile.

5.10 BricsCAD Pro

BricsCAD Pro is powerful 2D drafting and 3D modeling software, supporting hundreds of third-party apps. You can discover the software [here](#).

5.11 Other apps

You can use the **Bricsys 24/7 Panel** in BricsCAD BIM to connect your BIM project with the cloud.

In addition, we recommend the following third-party apps:

- LetsBuild



- TIQ
- SmartCheckups
- C-SITE
- KYP Project
- ArchiSnapper



6. Project Management

6.1 Set up a project

This chapter informs you how to get a project up and running.

You can set up a project from the beginning:

- 1 Create a new project
- 2 Edit the project settings
- 3 Create the folder structure
- 4 Define roles
- 5 Update access rights
- 6 Add users and send an invitation mail.

As an alternative, you can create a copy of an existing project and select the options you want to copy to the new project.

Important: Only the project administrator can create a new project, or copy an existing project.

Note: A customer can have multiple project administrators, managed by our support team.

6.1.1 Create a new project


You can create a project:

- 1 Log into Bricsys 24/7 on the [login page](#).
Result: **All projects** are displayed.
- 2 Click **New Project** to create a new project.
Result: The *New Project* window appears.
- 3 Enter the project details:
 - project picture: you can upload an image
 - project name
 - project description
 - country in which the project will be carried out
 - **Note:** Name and country are required fields.
- 4 Click **Create**.

Result: A pop up window informs you that the project is successfully created.

6.1.2 Edit the project settings

When a project is created, you can edit the project settings:

- 1 Select the project.
- 2 Click **Administration**  in the toolbar.
- 3 Click **Project settings** in the tool menu.



4 Click **Details**.

5 Add, or edit the project details:

- Project picture
- Project name
- Project description
- Location

6 Click **Save changes**.

Result: A pop up window informs you that the project is successfully updated.

7 Click **Documents**.

8 Select the option button of the document versioning you want to use to track the progress of a document:

- **Use standard versions** (default)

Select the option you want to use from the drop-down menu.

Example: Version 1

- **Use minor and major versions**

i Select the option you want to use from the drop-down menu next to **Major versioning system**.

ii Select the option you want to use from the drop-down menu next to **Minor versioning system**.

Example: Version 1.A



Each major version can represent a milestone the document has reached.

9 Enable or disable the **Document settings**:

- Allow locking of documents.
- **Note:** A locked document can not be moved or edited.
Note: A locked document can be unlocked:
 - by an administrator
 - by the user that locked the document
 - by uploading a new revision of the document.
- Add signature footer when printing documents:
 - An extra line is added in the footer of each document that is printed to PDF: Printed by *Firstname Lastname (date)*.
- Allow deleting of revisions.
 - **Note:** A document needs at least one revision. If you want to delete all revisions, you must delete the document.

10 Edit the **Document statuses**:

The default document statuses are: draft, proposal, in preparation, revised, approved with remarks, approved, final, archived, and obsolete.

- Hover over a status, click , and drag and drop the status to change the order.
- Hover over a status and click  to edit the status.



- Hover over a status and click **×** to delete a status.
- Hover over a status and click **☆** to set the status as default status.
When you upload a document, this will be the selected status by default.
- Click **add status**, enter a name and click **Add** to create a new status.

Note: The order of the statuses in this list determines the order of the statuses in the drop-down menu when uploading a new document.

11 Edit the **Time and date**:
Allows you to select the working days.

12 Click **Save changes**.

Result: A pop up window informs you that the project is successfully updated.

13 Click **Administrators**.

14 Enable or disable the **Document settings**:

- **Administrators can view all notes, notifications and annotations.**

When creating a new private message, project members will be informed that the message can be read by project administrators.

- **Administrators can replace the latest document revision.**

15 If applicable, enable **two-factor authentication**.

Result:

- You receive an email with a token in a generated token card.
- You must use that token to access the project.

16 If applicable, enable **Multi-factor authentication**.

To activate multi-factor authentication for a project: go to **Administration > Project settings >**

Administrator > Login settings and toggle On the **Multi-factor authentication** option.

17 Enable **Lock recycle bin** if you do not want items to be removed from the recycle bin.

Important: Once the recycle bin is locked, it can only be unlocked by sending a support request to our support team.

18 Click **Save changes**.

Result: A pop up window informs you that the project is successfully updated.

19 Click **Preview features**.

20 Enable or disable the **New interface settings**:

- **Set new interface as default.**
- **Allow users to switch between old and new interface.**


21 Click **Save changes**.

Result: A pop up window informs you that the project is successfully updated.





6.1.3 Create the folder structure

You can create the folder structure for the project.


- 1 Select the project.
- 2 Click **Administration**  in the toolbar.
- 3 Click **Project setup** in the tool menu.
All folders and subfolders are displayed per app.
- 4 Choose between **Add folder**, **Add binder** and **Add BIM**.

6.1.3.1 Add a folder

- 1 Click **Add folder** in the content pane to add a folder.
The **Add folder** window appears.
- 2 Enter a folder name.
- 3 Click on the different access type icons, or use the arrow icons  to toggle between the access rights for all roles.
- 4 Click **Add**.

A pop up window informs you that the folder is successfully added. The new folder () appears in the content pane.

Add a subfolder

- 1 Select an existing folder/binder/BIM.
- 2 Click the ellipsis button  at the top of the content pane.
A context menu pops up.
- 3 Click **Add folder** to add a subfolder.
The **Add new folder** window appears.
- 4 Enter a folder name.
- 5 **Optional:** type a description.
- 6 If applicable:
 - Enable **Copy access rights from parent folder**.
 - Enable **Copy metadata from parent folder**.
 - Enable **Copy automatic workflows from parent folder**.
- 7 Click **Add**.

A pop up window informs you that the subfolder is successfully added. The new subfolder appears in the content pane.

6.1.3.2 Add a binder


- 1 Click **Add binder** in the content pane to add a binder.




The *Add binder* window appears.


- 2 Enter a name for the binder.
- 3 If applicable, enable **Show only documents with status**, and select the applicable statuses.

Note: The available document statuses correspond to the project settings.

- 4 Click on the different access type icons, or use the arrow icons  to toggle between the access rights for all roles.
- 5 Click **Add**.

A pop up window informs you that the binder is successfully added. The new binder () appears in the content pane.

Add a sub-binder

- 1 Select an existing folder/binder/BIM.
- 2 Click the ellipsis button  at the top of the content pane.

A context menu pops up.

- 3 Click **Add binder** to add a sub-binder.

The **Add new binder** window appears.

- 4 Enter a folder name.
- 5 **Optional:** type a description.
- 6 If applicable:
 - Enable **Show only documents with status**, and select the applicable statuses.
 - Enable **Copy access rights from parent folder**.


- 7 Click **Add**.


A pop up window informs you that the sub-binder is successfully added. The new sub-binder appears in the content pane.

6.1.3.3 Add BIM

- 1 Click **Add BIM** in the content pane to add a BIM folder.

The **Add folder** window appears.

- 2 Enter a folder name.
- 3 Click on the different access type icons, or use the arrow icons  to toggle between the access rights for all roles.
- 4 Click **Add**.

A pop up window informs you that the BIM folder is successfully added. The new folder () appears in the content pane.

Note: A BIM folder cannot have BIM subfolders, but it can have subfolders and sub-binders.



Important: A BIM folder can be added and reordered only on root level.

6.1.4 Define roles

You must define roles:


- 1 Create a new role, or import a role from another project by searching existing roles.
- 2 If applicable, edit the role.

6.1.5 Update access rights


Follow the instructions in **Edit folder access** to update the access rights.

6.1.6 Add users and send an invitation mail

You can add users to the project:

- 1 Click **Administration**  in the toolbar.
- 2 Click **Users**.
- 3 Click **Invite users**.

Result: The *Invite users - Step 1* window appears.

- 4 Search for and add one or more contacts:
 - Enter the name or email address of a contact.
 - Click .The contact appears in the contact pane.
- If applicable, add another contact.

- 5 Enable **Send invitation mail**.
- 6 If applicable, enter a message to be included in the invitation email.
- 7 Click **Next**.

Result: The *Invite users - Step 2* window appears.

- 8 Select the applicable role(s) to assign to the selected users.
- 9 If the project has an address book, you can:
 - a select the address book to add the user(s) to the address book.
 - b select an organization to add the user(s) to the organization.
- 10 Click **Add user**.

Result: Pop up windows inform you that the users are successfully added to the project, and that the invitation mail is sent.

6.1.7 Copy a project

When you manage multiple projects, some projects have similar settings and/or the same structure. You can create a template project, in which you set up the folder structure, roles, forms and workflows, and use this template for each new project you create.



As a project administrator, you can create a new project based on your own existing project:

- 1 Log into Bricsys 24/7 on the [login page](#).

Result: **All projects** are displayed.

- 2 Click **My projects**.

Result: **My projects** are displayed.

- 3 Select a project in the content pane.

- 4 Click **Copy project**.

Result: The *Copy project - Step 1* window appears.

- 5 Enter the project details:

- project picture
- project name
- project description
- country in which the project will be carried out

- 6 Click **Next**.

Result: The *Copy project - Step 2* window appears.

- 7 Select and/or deselect the options you want to copy to your new project.

- 8 Click **Confirm**.

Result: A pop up window informs you that the project is successfully created.

Note: When you copy a project, the folder structure is copied, but the documents are not transferred. If you need a copy of the folders with documents included, you must select the folders and documents manually, and use the copy action. It is also possible to copy the documents with the Bricsys 24/7 Transfer Tool.

Note: You can copy the forms and metadata together with the project. However, as the documents are not transferred automatically, the form entries will not be transferred either. This does not apply to the links between forms and folders.

Example:

When you copy a project, and select Forms and Metadata, the links between forms and folders will be copied. As a consequence, if you upload a new document in a folder with a form attached, you will be asked to enter the metadata.

6.2 Manage a project

This chapter informs you how to manage active and archived projects.

6.2.1 Set the project size limit

You can set the project size limit:


- 1 Log into Bricsys 24/7 on the [login page](#).

Result: **All projects** are displayed.

- 2 Click **My projects**.

Result: **My projects** are displayed.



- 3 Select a project in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.
Result: A context menu pops up.
- 5 Click **Manage project size limit**.
Result: The *Manage project size limit* window appears.
- 6 Enable **Limit project size**.
Result: The **Limit** field appears.
- 7 Enter the applicable project size limit.
- 8 Click **OK**.


Result: A pop up window informs you that the project size limit is successfully set. The project size is displayed in the content pane.

6.2.2 Delete a project

Deleting a project:

- Retains all project data and settings.
- Prevents users from entering the project.

You can delete a project:

- 1 Log into Bricsys 24/7 on the [login page](#).
All projects are displayed.
- 2 Click **My projects**.
Result: My projects are displayed.
- 3 Select project status **ACTIVE** from the drop-down menu below the project bar.
- 4 Select a project in the content pane.
- 5 Click the ellipsis button  at the top of the content pane.
A context menu pops up.
- 6 Click **Delete project**.
The *Delete project(s)* window appears.
- 7 Click **Confirm**.

A pop up window informs you that the project is successfully deleted.

Note: You can still restore a deleted project.

6.2.3 Restore a deleted project

You can restore a deleted project:

- 1 Log into Bricsys 24/7 on the [login page](#).
All projects are displayed.



- 2 Click **My projects**



My projects

Result: My projects are displayed.

- 3 Select project status **DELETED** from the drop-down menu below the project bar.
- 4 Select a project in the content pane.
- 5 Click **Restore project**.

The **Restore project(s)** window appears.

- 6 Click **Confirm**.

A pop up window informs you that the project is successfully restored.

Tip: Select project status **ACTIVE** to display the active projects.

6.2.4 Permanently delete a project


You can permanently delete a project's data and settings:

- 1 Log into Bricsys 24/7 on the [login page](#).

All projects are displayed.

- 2 Click **My projects**.

Result: My projects are displayed.

- 3 Select project status **DELETED** from the drop-down menu below the project bar.
- 4 Select a project in the content pane.
- 5 Click the ellipsis button  at the top of the content pane.

A context menu pops up.

- 6 Click **Delete project**.

The **Delete project(s)** window appears.

- 7 Click **Confirm**.

A pop up window informs you that the project is successfully deleted.

Important: Restoring the project is no longer possible.

6.3 Set up a workflow

This chapter informs you how to create a workflow in the Workflow Viewer, edit it, release it, and attach it to a document or a folder if you want to start a workflow automatically when a new document is uploaded.

6.3.1 Overview

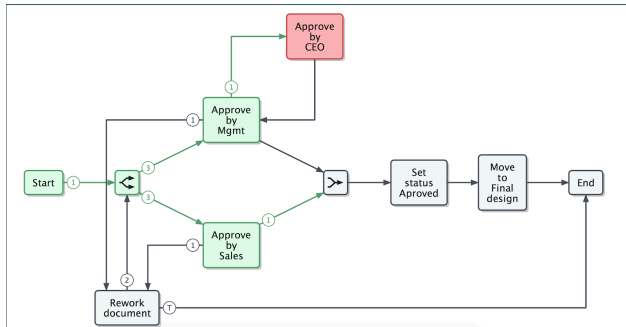
A workflow in a Bricsys 24/7 project is an automated process. It is, for example, used in the approval cycle of a document.


A workflow has a coordinator and contains activities and transitions:


- Activities are tasks that are performed manually or automatically by the system.

- Transitions are the arrows that connect activities, and allow the workflow to follow a predefined path.
- Outgoing transitions from manual activities are the answers that a project member can select when performing the task. An outgoing transition can have multiple answers. In Bricsys 24/7, answers are referred to as states.

All automatic tasks use the coordinator's access rights to perform the task.




Make sure that your project contains a workflow folder and you have access to the workflow folder. Once this is set up, the **Workflows**  tool becomes available in the toolbar.

The **Workflows**  tool and Bricsys 24/7 Workflow Viewer allow you to add, design, edit and manage workflows.

Note: Every document uploaded in a workflow folder, follows the applied workflow.

6.3.2 Create a workflow

You can create a workflow:

- 1 Click **Workflows**  in the toolbar.
- 2 Select the applicable workflow folder in the tool menu.
- 3 Click **Add workflow**.

Result: The *Add workflow* window appears.

- 4 Enter a name.

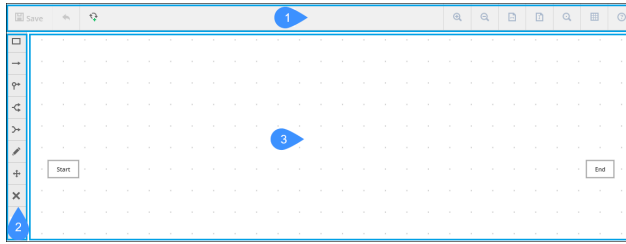
Important: Every workflow name in a project must be unique.

- 5 Define the coordinator role.
- 6 If applicable, enter a description.
- 7 Click **Add** to save the workflow.

Result: The Bricsys 24/7 Workflow Viewer opens.

- 8 Follow the instructions in Design a workflow [on page 105](#) to create a workflow.

6.3.3 Navigation in Bricsys 24/7 Workflow Viewer











The Bricsys 24/7 Workflow Viewer contains:

- 1 Menu bar
- 2 Toolbar
- 3 Grid

The menu bar contains:

| Icon | Description | Keyboard shortcut |
|------|-------------|-------------------|
| | Save | |
| | Undo all | |
| | Refresh | |
| | Zoom in | I, + |
| | Zoom out | O, - |
| | Fit width | W |
| | Fit height | O |
| | Fit page | F |
| | Grid | G |
| | Help | H |

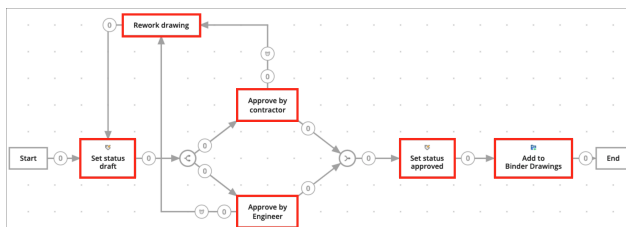
The toolbar contains:

| Icon | Description | Keyboard shortcut |
|---|----------------------------|-------------------|
|  | Add activity | Enter |
|  | Add transition | |
|  | Insert transition point | |
|  | Start parallel paths | |
|  | Synchronize parallel paths | |
|  | Edit | E |
|  | Move | M |
|  | Erase | Del |

6.3.4 Design a workflow

You can design a workflow in the Bricsys 24/7 Workflow Viewer:

- 1 Click **Add activity** .



- 2 Click on the grid to add an activity.
Result: The *Activity settings* window appears.
- 3 Enter a name for the activity.
- 4 Select an action.
An action is the type of the activity. You can choose between:
 - Assign task to somebody
 - A project member with the assigned role receives a question and has to answer with some proposed answers. The proposed answers are the names of the transitions that are leaving the activity.
 - Move item (to another folder)



- Add (the document) to binder
- Remove (the document) from binder
- Copy document (to another folder)
- Set document status
- Move to recycle bin
- Promote (last revision to) major version
- Send notification.
- **Note:** Except for **Assign task to somebody** (manual activity), all activities are automatic.

5 If applicable, enter the activity settings.
The settings correspond to the selected action.

Possible settings are:

- **Question:** Enter a question regarding the task
Example: Do you approve this document?
- **Choose who needs to react:** Assign to the role that must perform the task.
- **More specific:** Specify who must perform the task:
 - The **Actor of the previous activity**, or the **Coordinator** must select the actor of this activity.
 - **The first who reacts.** Everyone with the role receives the task, but as soon as someone performs the task, the others can not perform it any longer.
 - **Everyone:** Everyone with the role receives the task and must perform the task.
- **Choose a reminder and/or a deadline (optional):**
 - **Send reminder after:** After the selected period, the assignee receives a reminder of the task.
 - **Act within:** Select a period.

If the assignee does not react on time, the workflow will continue. You can select which transition will be followed in the transition overdue section.

- Click the drop-down arrow specify the type of reminder or deadline you need. You can choose between:
 - **hour(s)**
 - **calendar day(s)**
 - **business day(s)**
 - **week(s)**
 - **Month(s)**
- **Select a folder**
- **Add current revision to binder**
- **Set document status to:**
 - Approved
 - Proposal




- Draft
- Approved with remarks
- In preparation
- Reviewed
- Final
- Archived
- Obsolete
- Test status

6 Click **OK**.

Result: The activity appears on the grid.

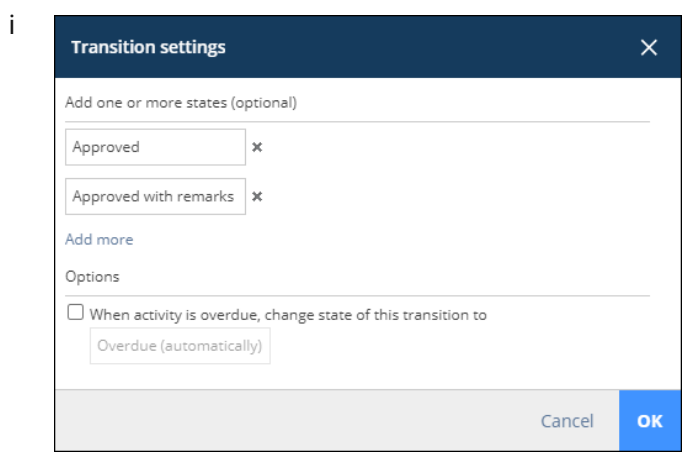
7 If applicable, add more activities.

8 Add a transition:

- Click **Add transition** .
- Click on the activity where the transition must start from.
- A blue line appears on the grid.
- Click on the activity where the transition must end.
- The *Transition settings* window appears.
- Enter a state (for manual tasks only).
- If you add a state to a transition, the actor of the activity must respond to the activity, before the workflow continues. The state that is entered in the transition will be the proposed answer for the actor. When the actor selects this proposed answer, the workflow continues.

Note: Every transition needs at least one state. The system will automatically set the default state to: **Done**.

h If you want several proposed answers leading to the same activity, enter more states (for manual tasks only).



j If applicable, tick the checkbox next to **When activity is overdue, change state of this transition to Overdue (automatically)**.

Tip: You can change this to your own state.

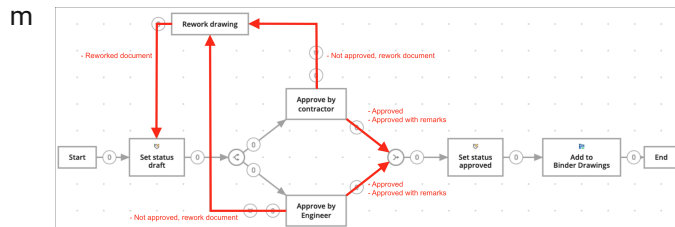
Important: Every transition state must be unique.

Tip: If you selected that the actor of the task must act within a certain period, you can mark the transition to be followed once the deadline has passed.

k Click **OK**.

The transition is added to the grid.

l If applicable, add more transitions.



9 If applicable, add parallel paths if multiple activities need to start or end together:

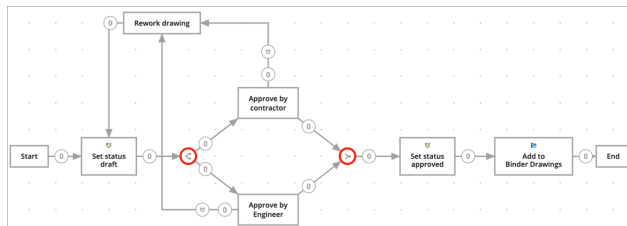
- Add **Start parallel paths** if the path of your workflow must split.

Example: Multiple project members must approve a document.

- Add **Synchronize parallel paths** if 2 or more paths end together.

The synchronized path will await all incoming transitions to be activated, before continuing the workflow.

Example: If both contractor and engineer approve the document, continue the workflow and set the status to approved.



Note: A workflow can have multiple end activities. When one end activity is reached, the workflow ends and other tasks in this workflow can no longer get executed.

10 If applicable, click **Move** to reposition activities in order to have a better overview of your workflow.



11 Click **Save**.

Result: A pop up window informs you that the workflow is edited.

12 Close the Bricsys 24/7 Workflow Viewer.

6.3.5 Consult a workflow

You can consult a workflow:


1 Click **Workflows** in the toolbar.



- 2 Select a workflow folder in the tool menu.
- 3 Select the applicable workflow status from the drop-down menu at the top of the content pane:
 - All statuses
 - New
 - Released
 - Obsolete
- 4 Select a workflow in the content pane.
- 5 Click **Open viewer**.
Result: The Bricsys 24/7 Workflow Viewer opens.
- 6 Check the workflow.
- 7 Close the Bricsys 24/7 Workflow Viewer.

6.3.6 Edit a workflow

You can edit the activities and transitions of a workflow:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click **Edit**.
Result: The *Edit* window appears.
- 5 Click on the magnifying glass in the preview pane.
Result: The Bricsys 24/7 Workflow Viewer opens.
- 6 Edit the workflow.




- 7 Click **Save**.
Result: A pop up window informs you that the workflow is edited.
- 8 Close the Bricsys 24/7 Workflow Viewer.

Note: As an alternative, you can click on the file name of a workflow in the content pane to open the Bricsys 24/7 Workflow Viewer and edit the workflow.

6.3.7 Edit the workflow info

You can edit the file name, role, status and description of a workflow:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click **Edit**.
Result: The *Edit* window appears.




- 5 If applicable, edit the name, define the coordinator role, update the status, and enter a description.
- 6 Click **Edit**.

Result: A pop up window informs you that the workflow is successfully edited.

6.3.8 Release a workflow

You need to release a workflow in order to activate it:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click **Edit**.

Result: The *Edit* window appears.


- 5 Update the **Status** to **Released**.
- 6 Click **Edit**.

Result: A pop up window informs you that the workflow is successfully edited.

Important: Once a workflow is released and in use, you can not edit the workflow any longer. If you want to edit the workflow, you first need to create a copy of the workflow.

6.3.9 Change the workflow status to obsolete

You can change the status of an active workflow to obsolete:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click **Edit**.

Result: The *Edit* window appears.



- 5 Update the **Status** to **Obsolete**.
- 6 Click **Edit**.

Result: A pop up window informs you that the workflow is successfully edited.

Important: If you change the status of an active workflow to obsolete, you can not use the workflow any longer. The workflow stays active until it is canceled or deleted.

6.3.10 Copy a workflow

You can copy a workflow:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.



- 5 Click **Copy**.

Result: The *Copy* window appears.

- 6 Select the workflow folder where you want to copy the workflow to.

Tip: If applicable, you can copy the folder to a different project.

- 7 If applicable, edit the file name, define the role, and enter a description.

- 8 Click **Copy**.

Result: A pop up window informs you that the workflow is successfully copied.

6.3.11 Move a workflow

You can move a workflow:

- 1 Click **Workflows**  in the toolbar.

- 2 Select a workflow folder in the tool menu.

- 3 Select a workflow in the content pane.

- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Move**.

Result: The *Move workflow(s)* window appears.

- 6 Select the folder(s) you want to move the workflow to.

Tip: You can move the workflow to the current project or a different project.

- 7 If applicable, edit the name, and enter a description.

- 8 Click **Move**.

Result: A pop up window informs you that the workflow is successfully moved.

6.3.12 Add a workflow to a binder

You can add a workflow to one or more binders:

- 1 Click **Workflows**  in the toolbar.

- 2 Select a workflow folder in the tool menu.

- 3 Select a workflow in the content pane.

- 4 Click the ellipsis button  at the top of the content pane.

A context menu pops up.

- 5 Click **Add to binder**.

The **Add to binder** window appears.

- 6 Select the binder(s) you want to add the workflow to.

- 7 **Note:** If available, you can select a sub-binder by clicking the arrow (1) next to the folder name.



Add to binder

Select the binder(s) you wish to add the workflow(s) to

[All projects](#) / Camelia

 BIM folder

 Document Folder

 Form

 New folder

 New Binder

 111

8 Click **Add**.



A pop up window informs you that the items are added to the binder(s).



6.3.13 Delete a workflow

If you delete a workflow, the workflow is moved to the recycle bin.

You can delete a workflow:

- 1 Click **Workflows**  in the toolbar.
- 2 Select a workflow folder in the tool menu.
- 3 Select a workflow in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Delete**.

Result: The *Delete workflows* window appears.

- 6 Click **Delete** to delete this workflow.



Result: A pop up window informs you that the workflow is successfully deleted.

Note: You need the appropriate permission to be able to delete a workflow.

6.3.14 Cancel a workflow

If you cancel a workflow, the workflow is put on hold. It is possible to activate the workflow again if necessary.

You can cancel one or more workflows:

- 1 Click **Files**  in the toolbar.
- 2 Select the applicable (sub)folder in the tool menu.
- 3 Select the applicable document(s) in the content pane.
- 4 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

- 5 Click **Cancel workflow**.

Result: The *Cancel workflows* window appears.


- 6 Select the workflow(s) you want to cancel.
As an alternative, select **Workflow name** to cancel all workflows.

- 7 Click **OK**.

Result: A pop up window informs you that the workflows are successfully canceled.

Important: You need the appropriate permission to access the document.

6.4 Set up metadata



The **Forms**  tool allows to save all kinds of data in Bricsys 24/7.

One of the most common use cases is metadata, extra information to a document in order to combine documents and search on that data throughout the project.



This chapter informs you how to create and manage forms in your project.

6.4.1 Create a form

- 1 Click **Forms**  in the toolbar.
- 2 Select the applicable form folder  in the tool menu.
- 3 Click **New form**.

Result: The **Form editor** appears.

- 4 Enter a form name at the top left corner.
Note: The form name is a required field.
- 5 In the left pane, check the available form fields.
The form fields are the elements that contain data.

The form fields are combined into 4 groups:

- **Text**
- **Number**
- **Other**
- **Layout**




- 6 Drag and drop the form fields of your choice to the content pane.

Result: Once a form field is dropped, you can adjust the settings of the field. The settings correspond to the selected form field.

- 7 Enter a name for all form fields and adjust the settings.

Note:

- In a **Choice** form field, you can manually add options a project member can choose from. Each option consists of a value and a description. The value is required and is used if you use metadata to define the document name.
- In a **Choice** form field, you can use the form value of an existing form:
 - i Click **Select a form**
The *Select form fields* window appears.
 - ii Select the applicable form fields.
 - iii Click **OK**.
The selected form fields are displayed.
- A **Counter** form field allows you to add a counter at the end of your document name, if you want to rename the documents based on the metadata input. The counter searches for the amount of rows that already contain the same data. If none have the same data, the number is 1. If there are already 2 rows with the same data, the number is 3. You can chose the amount of decimals that is used: 1 to 10. Selecting 4 decimals turns number "1" into "0001". An example of a document is: PL_HVAC_0001.dwg.


- 8 If applicable, click  to copy a form field, or click  to delete a form field.
- 9 If applicable, hover over , click, and reposition the form field.



10 If applicable, click **Preview** at the top right corner.

Result: A preview of the form appears.

Result: Click **Edit form** to return to the **Form editor**.

11 Click the ellipsis button  at the top right corner.

Result: A context menu pops up.

12 Click **Edit permissions**.

Result: The *Set permissions* window appears.

13 Click on the different access type icons to set a specific access type.

As an alternative, use the arrow icons  to toggle between the access rights for all roles at once.

14 Click **OK**.


15 Click **Save** at the top right corner.

Result: A pop up window informs you that the form is added successfully.

6.4.2 Add a form entry to a form

You can add an entry to a form:

1 Click **Forms**  in the toolbar.

2 Select the applicable form folder  in the tool menu.

3 Select the applicable form in the content pane.

4 Click **Add Entry**.

Result: The applicable form field appears.

5 Adjust the setting(s) of the form field.

6 Click **Submit**

Result: Pop up windows inform you that the entry is added and the form entry is submitted.

7 Click **Add another entry**, or click the **X** icon to return to the selected form folder.

6.4.3 Work with reservations

Reservations are blank documents to be filled in by the project member. A reservations is used as placeholder for the final document. The final document can be added as a revision, which will replace the placeholder.

You can add a reservation to a folder with metadata added and **Rename uploaded documents based on the fields' content** enabled:

1 Click **Files**  in the toolbar.

2 Select the applicable (sub)folder in the tool menu.

3 Click the ellipsis button  at the top of the content pane.

Result: A context menu pops up.

4 Click **Add reservation**.



Result: The *Add reservation window* appears.

- 5 Edit the number of reservations.
- 6 Update the status.
- 7 If applicable, enter a description.
- 8 Select the date and time.
- 9 Click **Add**.

Result: A pop up window informs you that the reservation is successfully added.

6.5 Multi-factor authentication

6.5.1 About

Multi Factor Authentication (MFA) is a multi-step account login process that requires users to enter more information than just a password, further verifying users are who they say they are, and who they are logging in as.

Bricsys 24/7 implements MFA with the need to provide an extra security step through an authenticator app, such as Google Authenticator or Microsoft Authenticator.

When you have enabled MFA on your account, the login procedure will require you to enter the code generated by the authenticator app.

MFA may be required at a project level for all project users, but it is activated at a user level by a user.

6.5.2 Downloading an authenticator app

Authenticator apps generate a one-time code that you can use to sign in. These app providers will not have access to your Bricsys 24/7 password and account information.

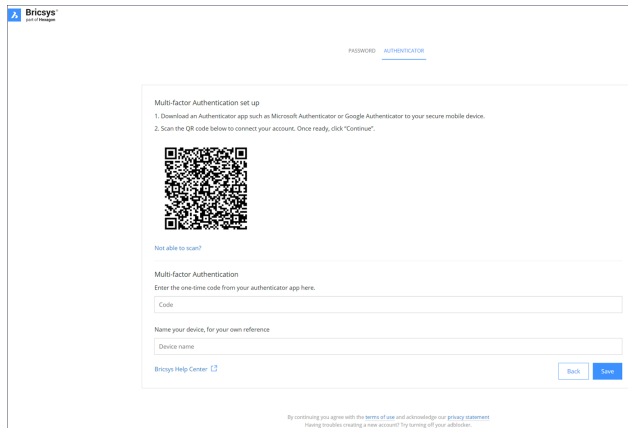
To download an app

- 1 Open the app store of your phone.
- 2 Search for 'authenticator app'.
- 3 Download an app from a trusted provider.
- 4 **Tip:** Check that they have a recovery method if you cannot access your device.
- 5 Open the app and follow the instructions.

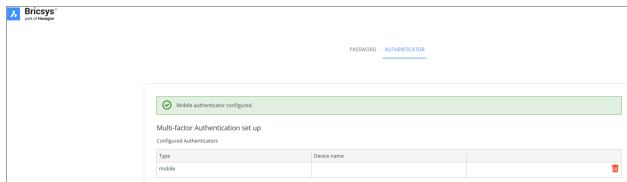
6.5.3 Multi-factor authentication set up

We are using the QR code method for Authenticator app (MFA) set up. This requires that you set up MFA on one device (for example laptop/desktop or tablet), with an authenticator app on a second (mobile) device that has a camera.

- 1 Go to the **AUTHENTICATOR** tab in your Profile, under **Security settings**.
- 2 Scan the QR code with your Authenticator app to connect your account. To scan the code, the second (mobile) device must have a camera.
- 3 **Note:** If the QR code gives an error in the mobile app, click the **Not able to scan?** button and the QR code will be regenerated.



- 4 Type the one-time code received in your authenticator app.
- 5 **Note:** The one-time code will change every 30 seconds.
- 6 Optionally, enter your device name.
- 7 Once ready, click **Continue** to finish the mobile authenticator configuration.



- 8 If the configured authentication device needs to be changed, it can be deleted from Authenticator page. The page resets to the initial MFA set up page.

Note: An invitee or existing user must contact their admin:

- If they want to change their email address.
- If they have MFA active and lose access to the device or app used for authentication.


Note: When you type a wrong one-time code five times or a wrong password, you are locked out of your account for at least 1 minute and incrementally up to a maximum of 15 minutes.

6.5.4 Activate MFA requirement on a project

To activate multi-factor authentication for a project: go to **Administration > Project settings > Administrator > Login settings** and toggle On the **Multi-factor authentication** option.


The following warning modal will be displayed to inform the customer admins (which includes the project owner) about the access modification of the specific project.



 **Switching MFA on will affect login for all users** ✕

All users, including yourself, will need to have multi-factor authentication set up on their user account to access this project.

It is advisable to **set MFA up on your own account**, before switching on MFA for this project.

[I understand, switch on MFA](#) [Go to account settings](#) 

I understand, switch on MFA

Closes the modal and the changes will be made after pressing **Save changes** button.


If you do not have MFA set up, the following modal will be displayed:

Multi-factor Authentication (MFA)

This project requires you to have MFA set up on your account. There is a short set up process using a mobile device or tablet.

If you have MFA set up, please log out and then Log in using your authenticator code

You will then be able to access this project

[What is this and why do I need it?](#) 

[Back to projects list](#) [Log out](#) [Start MFA setup](#)

Note: It is not possible to exit this modal.

After you log out and log in again, the one-time code will be required, and you will be able to access the project where you enabled the MFA.

Note: After MFA is enabled, the MFA icon () will be visible in All projects for your project.

Note: The MFA column in **Administration > Users content** pane is visible to customer admins only, regardless of whether the project has MFA turned on or not.

Note: The **Multi-factor authentication** toggle switch is visible for all administrators, but the radio button can be enabled or disabled only by customer admins.

Note: An invitee or existing user must contact their admin if they want to change their email address.



7. Glossary

A list of terminology, acronyms and abbreviations.

- Binder: a folder that contains a specific collection of documents
- BIM: Building Information Modeling
- CDE: common data environment
- CSV: a comma-separated values file is a delimited text file that uses a comma to separate values.
- DWG: a binary file format used for containing 2D and 3D design data (derived from drawing)
- IFC: Industry Foundation Classes
- QR code: a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone.
- Synch: in the Bricsys 24/7 Transfer Tool, a download can be saved as a synchronization to remain identical in all locations



8. Important Information

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8.1.1 Disclaimer notice

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