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Getting Help on BIMcloud

Context-Sensitive Help
On any page of BIMcloud Manager, click the question mark at top right.

The Help will open to a description of the currently active content/panel.

PDF Guide
Click here to access the PDF version.

Additional Resources
See the BIMcloud-related Knowledge base articles at GRAPHISOFT’s online Help Center.
Introduction to BIMcloud

GRAPHISOFT BIMcloud responds to an industry need - allowing remote teams to work together and handle large files. It also allows working offline, and enables working from just about any location, so that team members can log in and work anywhere. Any project data that can be imported into ARCHICAD can be communicated via the GRAPHISOFT BIMcloud.

- When implementing BIM on a larger scale, architects often run into bottlenecks in model accessibility and workflow management. GRAPHISOFT’s BIMcloud is the industry’s pioneering solution for model-based team collaboration for companies who use Teamwork in ARCHICAD.

- The Delta Server™ technology reduces network traffic to a minimum for instant and reliable data-exchange, both within the office and over the Internet. In Teamwork, long waiting times for server synchronization are a thing of the past: team members can collaborate in real-time on BIM models through standard Internet connections from virtually anywhere in the world.

- The BIMcloud’s robust system architecture ensures the integrity of the BIM project at all times. Any data errors from malfunctioning components are blocked, preserving the project’s integrity on the network.

- The BIMcloud was designed for Architects, not for IT professionals - so it works in any standard office setup through any standard computer network.

- BIMcloud supports both online and offline work: if ARCHICAD loses the connection to the server, users can continue to work with their already reserved elements. Once the connection is re-established, they will be able to send their changes and receive changes submitted by other users.

- Built-in Teamwork Messaging boosts communication among users by putting the messages into context: simply select any element(s), write a comment and send it to another user for a review. A pop-up notification will inform the other user about the incoming message. After opening the message, he/she can zoom to the element and read the message in context.

- Roles allow an administrator, working in the browser-based Manager, to define different permission sets for Teamwork users and assign them based on their responsibilities. It is very easy to limit the functions available for a specific user to prevent accidental damage or unwanted modifications to the project. Each user can have different Roles for different projects - to fit their responsibilities in that particular project. Even a view-only role can be created, allowing people to Join the project without being able to modify anything.

- BIMcloud meets the needs of large international companies running multiple, complex projects. With its powerful features and sophisticated management tools, BIMcloud can disperse the projects along multiple BIMcloud Servers while using a single entry point for the whole system.

- BIMcloud also serves as a totally open BIM based platform, supporting formats like IFC, BCF, PDF and others, as a common ground for various collaboration tools.

Topics in this chapter:

- Key Features of BIMcloud
- BIMcloud vs. BIMcloud Basic: Feature Differences
Key Features of BIMcloud

BIMcloud consists of:

– BIMcloud Manager: Management function of BIMcloud
– BIMcloud Server: Model handling component of BIMcloud. One or more BIMcloud Servers can be installed to the same or separate computers
– BIMcloud Delta Cache: Optional component which optimizes data transfer between ARCHICAD clients and a BIMcloud Server

Browser-Based Management

The BIMcloud Manager is a browser-based management interface that controls each aspect of the BIMcloud. This is a zero deployment tool in the hands of server managers: start a web browser on any computer, enter the address of the BIMcloud, and log in with his/her credentials. This solution does not even require a desktop computer or a laptop: any tablets or mobile phones with the Internet access can utilize this interface, on a screen display adjusted to the device’s parameters.

In addition to server managers, regular users can access this interface to review the status of their projects, access the project Activities list, and modify their personal parameters (e.g. password). Of course, they can access only those resources of the BIMcloud where they have adequate permissions.

Folder-based Project Organization

Note: Folder structure is limited to a single level in BIMcloud Basic.

The project management interface allows users to create folders for projects and servers.

Large firms with many projects must be able to organize them into a logical hierarchy. The folder logic is up to the company’s strategy: set up folders based on studios, offices, project types, owners or architects. The
folder organization even allows for setting up several completely different business units on the same BIMcloud. The visibility of these folders can be controlled based on responsibilities.

A special type of folder is the BIMcloud Project: a folder-like container, created on the Projects page of BIMcloud Manager. Use a BIMcloud Project to store Teamwork Projects, files of any format, and sub-folders in one place. Unlike regular folders, BIMcloud Projects can have unique Teams of users assigned to them and/or to their sub-items.

Note: BIMcloud Projects are not available in BIMcloud Basic.

The folder organization is not limited to projects. Folder hierarchies enable managers to quickly and centrally modify backup strategies and access permissions, because lower-level folders and items in the folder hierarchy inherit these parameters from a higher level. Changing the backup settings for the folder immediately changes the backup settings for all the projects in that folder and all its sub-folders. If for some reason a particular project requires unique backup settings, these can be easily customized without affecting the whole system inheritance.

Folders can be also useful for organizing the BIMcloud Servers (for example, all BIMcloud Servers located in a particular office can be organized in a single folder). Their settings are inherited within the folder hierarchy, just as for projects.

**Standardized, Secure Communication**

All BIMcloud components use the standard http (or https) protocol for communication. The http protocol is a common and accepted protocol in the IT industry; most (if not all) of any company’s network infrastructure is already capable of supporting it, and there is no need for further investments.

The https protocol is a trusted and secure communication channel used by all online banking systems and most online email applications. Utilizing the company’s existing certificates, ARCHICAD is able to communicate through this secure channel, enabling work on a BIMcloud from a remote location and preventing 3rd parties from accessing sensitive data.

**Multiple BIMcloud Servers**

Note: Not available in BIMcloud Basic.

The BIMcloud is centrally managed through the BIMcloud Manager, whose browser-based interface provides central management of the BIMcloud Servers, BIMcloud Delta Caches and ARCHICAD clients.
**Key Features of BIMcloud**

**Introduction to BIMcloud**

- Allows multiple BIMcloud Servers to function within a single BIMcloud
- Keeps track of a project’s location
- Maintains a single, integrated list of users with their defined roles

For a Teamwork user, BIMcloud ensures a seamless workflow: he/she joins or opens the desired Teamwork project. The BIMcloud Manager automatically redirects to the correct project on the correct BIMcloud Server and ensures the automatic connection without any user interaction. If a server administrator shifts a project from one BIMcloud Server to another, the user can work without interruption, without needing to sign in to a different BIMcloud.

See [Servers Page](#).

**Streamlined User Management, User Groups**

**Note:** Not available in BIMcloud Basic.

The BIMcloud integrates user management with the company’s existing corporate user directory, using the worldwide standardized LDAP protocol.

A large company with many employees generally has a User Directory service. The BIMcloud - like other software (e.g. email server, intranet) - can connect to this User Directory, or even to several user directories simultaneously. User directory groups can be replicated on the BIMcloud Manager. Additional and/or ad-hoc user groups can be created if needed.

Users who log in to their office computers use the same login name and password to join a Teamwork project. This can greatly simplify the maintenance of the company user list. See [BIMcloud Manager - LDAP Panel](#).
Detailed Management Permissions

Note: Not available in BIMcloud Basic.

The BIMcloud allows the fine-tuning of user permissions for all resources on the BIMcloud (e.g. users, roles, libraries...).

A large firm with far-flung offices may well have multiple users with different levels of server manager competencies. The BIMcloud allows you to configure this at a very detailed level. For example, each server manager has access only to the users he/she needs to manage. Similarly, a server manager's right to manage hardware functions (e.g. restart) can be limited to a particular server/module.

If subcontractors are also allowed to work on the BIMcloud, their access can be restricted to their particular project: they will not be able to see any other projects, users or settings of the BIMcloud.

See Access Panel.

Multi-Language Support

The language of the BIMcloud Manager interface can be changed on the fly from a language pop-up - located at the top-right corner of the interface.

Companies with multiple offices across multiple continents will probably use the local languages in each office. To avoid enforcing the language of the main office (where the BIMcloud Manager is hosted), users from the local offices logging in to the BIMcloud Manager can change their language to a preferred one. This change has no effect on anyone else in the company, or on the settings and modifications made on the BIMcloud Manager.
BIMcloud Delta Cache

Note: Not available in BIMcloud Basic.

If multiple ARCHICAD clients are working from the same location, while the project is hosted on a remote BIMcloud Server, the same data must be downloaded multiple times - once for each client. This redundancy increases server load and reduces available bandwidth.

The BIMcloud Delta Cache component optimizes data transfer between the ARCHICAD clients and a BIMcloud Server by caching the data on the client side. Once an ARCHICAD client downloads a part of the project, the data will be cached locally by the BIMcloud Delta Cache and offered to the next ARCHICAD client who requests the same data.

Performance Improvements

Note: Not available in BIMcloud Basic.

The BIMcloud Manager can connect to multiple distinct servers via a common interface. By adding these additional server computers, the manager can optimize server performance by load-balancing the projects manually among different computers, without affecting the work of the users.
# BIMcloud vs. BIMcloud Basic: Feature Differences

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<th>Feature</th>
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<th>BIMcloud</th>
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<td>+</td>
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<td>Browser based Management</td>
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<td>http/https Support</td>
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<td>System Notifications</td>
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<td>Send Emails</td>
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<td>Change Notifications (folders and files)</td>
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<td>BIMcloud Delta Cache</td>
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Install Guide

Use the BIMcloud Installer to install or update any or all of the following components as needed.

– BIMcloud Manager: Management function of BIMcloud
– BIMcloud Server: Model handling component of BIMcloud. One or more BIMcloud Servers can be installed to the same or separate computers
– BIMcloud Delta Cache: Optional component which optimizes data transfer between ARCHICAD clients and a BIMcloud Server

Download and start the Installer for BIMcloud. The wizard will take you through the necessary steps.

If you have no previously installed BIMcloud components on your computer, the Clean Installation process will begin.

If you do have previously installed, older-version BIMcloud components, the installer will automatically identify and list the components for which an update is available. You can then run the update(s) straight from the installer.

All steps are described in the following sections:

Hardware/Software Requirements
Compatibility
Update Components to Current BIMcloud
Clean Installation
BIMcloud Delta Cache
Reconfigure BIMcloud Components
Redefine Snapshot Folder
BIMcloud Licensing
Upgrade from BIMcloud Basic to BIMcloud
Downgrade from BIMcloud to BIMcloud Basic
Uninstall BIMcloud
Hardware/Software Requirements

Hardware/Software requirements are modified from time to time. For up to date information on system requirements, please consult the following link:

http://www.graphisoft.com/support/system_requirements

Related Topics:
BIMcloud Licensing
Upgrade from BIMcloud Basic to BIMcloud
Compatibility

BIMcloud 2020.2 supports

- BIMcloud Servers 2018.2 and up
- ARCHICAD: Versions 19 and up

Note: Make sure you have installed the latest update for your ARCHICAD version!

Related Topic:
Update Components to Current BIMcloud
Update Components to Current BIMcloud

If you have existing, earlier-version BIMcloud components on your computer, it is recommended that you update all components to the latest version. This ensures access to the latest BIMcloud features and fixes. When you start BIMcloud Installer, the program automatically checks your computer for any existing BIMcloud components (BIMcloud Managers, BIMcloud Servers, Delta Cache), and lists those for which an update is available. You can then run the update(s) straight from the installer.

The update process keeps all existing data and configuration intact on the server (users, roles, projects, permissions.)

This one-step update process works to update BIMcloud components from versions 2018.2 and up.

Topics in this Section:
- Update Components (from BIMcloud 2018.2 and up)
- Update Older BIM Server Versions
- How to Identify BIMcloud Components

Update Components (from BIMcloud 2018.2 and up)
1. Start the BIMcloud Installer.
2. Existing components have been detected. It is recommended to update them. Click Update existing component.

![BIMcloud 2020.2 Installation](image-url)
3. The updatable components are listed in the popup. Choose one to update (e.g. BIMcloud Manager).

![BIMcloud 2020.1 installation](image)

The following components on your computer can be updated:

- BIMcloud Manager (Manager-2020-06-10)
- BIMcloud Manager (Manager-2020-05-10)
- BIMcloud Server (Server-2020-06-10)

Need help with updating? Please visit GRAPHISOFT Help Centre.

Click **Next**.

4. The component is updated. The older version is removed, and the latest version is installed in its place.

![BIMcloud 2020.1 installation](image)

You have successfully updated BIMcloud Server on this computer.

Click **Finish**.

5. Run the installer again to update any additional components in the list (e.g. BIMcloud Server).

See also **How to Identify BIMcloud Components**.
6. Once all possible BIMcloud components have been updated, the installer no longer offers the update option.


**Update Older BIM Server Versions**

It is not possible to update BIM Server 19, 20 and 21 to the latest BIMcloud version in one step. But you can do it through a two-round update process. First you update the components to **2020.1**, then you can update them to **2020.2**.

Follow these steps:

2. Run this installer to update your BIMcloud Manager to BIMcloud 2020.1.
3. Run the installer again to update your BIMcloud Server to BIMcloud 2020.1.

Now you can update to BIMcloud 2020.2:

4. Run the latest installer to update your BIMcloud Manager to BIMcloud 2020.2.
5. Run the installer again to update your BIMcloud Server to BIMcloud 2020.2.

**Notes for Mac users:**

- If you are installing or updating BIMcloud on a Mac OS 10.15 system, you must choose a location that is in or underneath the Applications folder.
- If you are installing or updating BIMcloud on a Mac OS 10.15 system, you must grant Full Disk Access for BIMcloud. The BIMcloud Full Disk Access Tool appears automatically to guide you through the steps.

See this [Help Center article](http://helpcenter.graphisoft.com/technotes/bimcloud-and-bim-server/multi-version-server-technology/) for details.

**How to Identify BIMcloud Components**

You may have multiple BIMcloud Servers and (as of v2018) multiple BIMcloud Managers installed, which can result in a long list of updatable components when you run the installer.

- Earlier version components are identified by version number. (e.g. BIMcloud Manager 21, BIM Server 19)
• As of v2018, BIMcloud components are identified by the name of their installation folder, which includes the date of installation. This folder name is automatic and cannot be changed.

You can see your installed BIMcloud components by name in the following places:
• on the Status page of BIMcloud Manager (Servers page)
  - on the BIMcloud Tray icon

See also BIMcloud Tray Icon.
Clean Installation

If no BIMcloud components exist on your computer, then the BIMcloud Installer will take you through the following “clean installation” process.

1. Start BIMcloud Installer, then click Next.

2. Choose Install new BIMcloud. This installs two components, one after the other:
   - BIMcloud Server
   - BIMcloud Manager
3. Accept the license agreement. To see the full text in a browser, click Open in Browser.

4. Choose the installation location for BIMcloud Server.
5. A summary panel shows you where BIMcloud Server will now be installed. Click **Install** to start the process.

For Mac users:
- If you are installing BIMcloud on a Mac OS 10.15 system, you must choose a location that is in or underneath the Applications folder.
- If you are installing BIMcloud on a Mac OS 10.15 system, you must grant Full Disk Access for BIMcloud. The BIMcloud Full Disk Access Tool appears automatically to guide you through the steps.

See this [Help Center article](#) for details.

6. When the installation is complete, the following panel appears:

Click **Configure** to continue.
BIMcloud Server Configuration

1. Define basic Server settings on the first page of the Configurator:

   - **Port**: Select a free port or use the "Find an available port" command to automatically find one.
   - **Data Folders**: Enter or Browse the location of the default Data Folders for Projects, Libraries and Cache.
     - **Teamwork Projects** and **Libraries** on this BIMcloud Server will be stored in these folders
     - The default **Cache** folder stores temporary Teamwork data, which is used to speed up Teamwork processes.

For Windows users:

The Cache folder you choose must be in a drive for which 8.3 naming is enabled. If this is not the case, you will get a warning. Please select a different drive, where 8.3 file naming is enabled, and then you can proceed.

Alternatively, you can enable 8.3 name generation for the current drive, then create a totally new folder, and select it as the new Cache location. The new folder’s parent folders (if any) must also be created after you enable 8.3 name generation.
2. Click Next to open BIMcloud Only Settings - BIMcloud Server.

Settings on this page require a BIMcloud User License. Do not set these options if you plan to use BIMcloud Basic; the settings here will have no effect, and may cause anomalies.

File Storage
Files uploaded to BIMcloud Manager will be stored at this location.

Enable BIMcloud Server Backup
Check this box if you plan to create backups of BIMcloud Server data. After checking the box, you must enter (or browse for) the path of the backup folder location.

Notes:
– To set up a Backup schedule, use the BIMcloud Manager (Servers page, Backups panel). See BIMcloud Server/BIMcloud Manager - Backups Panel.

Save Snapshots to External Folder
By default, Project and Library snapshot files are saved to the folder where you installed the BIMcloud Server, with an .archive extension.

See Snapshot Files Location
You can optionally choose a different folder: check this box, then browse for a folder path.

BIMcloud will henceforth save Snapshots to this folder, in three automatically created sub-folders:
• PLN Snapshot
• Teamwork project Snapshot
Clean Installation

Install Guide

- Library Snapshot

You can later redefine this folder path. See Redefine Snapshot Folder.

3. Click **Start**, to launch the newly installed BIMcloud Server. Wait for the next step...

4. The Installer Welcome screen appears for the next process: Install BIMcloud Manager. Click Next.

5. Choose a default language. This is the language used by the BIMcloud Manager's browser-based interface. You can later switch languages from BIMcloud Manager, if needed.
6. Accept the license agreement. To see the full text in a browser, click Open in Browser.

7. Choose the installation location for BIMcloud Manager.

For Mac users:

– If you are installing BIMcloud on a Mac OS 10.15 system, you must choose a location that is in or underneath the Applications folder.

– If you are installing BIMcloud on a Mac OS 10.15 system, you must grant Full Disk Access for BIMcloud. The BIMcloud Full Disk Access Tool appears automatically to guide you through the steps.

See this Help Center article for details.
8. A summary panel shows you where BIMcloud Manager will now be installed. Click **Install** to start the process.

![Installation summary panel]

9. When the installation is complete, the following panel appears:

![Completion panel]

Click **Configure** to continue.
BIMcloud Manager Configuration

1. Define basic BIMcloud Manager settings on the first page of the Configurator:

- **Display Name**: By default, the BIMcloud will use the name of your computer. All server pop-ups will identify the BIMcloud by this name.
- **Port**: Select a free port, or use the Pick free port command to automatically find one.
- **Master Administrator password**: Create a secure password for the Master Administrator (masteradmin) user. This Master Administrator will always be able to log in with full access to all hosted data. In case you forget the password, you must reconfigure your BIMcloud and enter a new password.
- **Data folder**: This is the BIMcloud Manager's data storage folder.
  
  Note: Projects will be stored in a different folder - as defined on the first page of the BIMcloud Server configuration wizard.
2. Click **Next** to open BIMcloud Only Settings - BIMcloud Manager.

Settings on this page require a BIMcloud User License. Do not set these options if you plan to use BIMcloud Basic; the settings here will have no effect, and may cause anomalies.

- **Enable BIMcloud Manager Backup:**
  
  Check this box if you plan to create backups of BIMcloud Manager data. After checking the box, you must enter (or browse for) the path of the backup folder location.
  
  **Note:** To set up a Backup schedule, use the BIMcloud Manager (Servers page, Backups panel). See [BIMcloud Server/BIMcloud Manager - Backups Panel](#).

3. Click **Start**. Configuration proceeds, until you see the following notice:
4. Click OK.

The next Configuration steps take place in a browser. (If your browser does not open automatically, then use the following URL: http://localhost:PORT, where PORT is the port you entered on this Configuration page.)

**Continue the Configuration in a Browser**

![Configuring BIMcloud](image)

Click **Start**.

**Log in as Master Administrator**

Enter the Master Administrator password to Log in to the BIMcloud Manager.

**Create First User**

Enter data for the first user. This user will be the first Server Administrator on the BIMcloud Manager. Fill in all the fields:
Select Product Plan

Choose the BIMcloud product to use: the full BIMcloud, or BIMcloud Basic.

- The full BIMcloud, with all features, requires a BIMcloud User License.
- BIMcloud Basic requires no license, but has limited functionality.

Regardless of the one you choose here, you can still upgrade or downgrade later, from the BIMcloud Manager’s Servers page.

For the difference between the two products, see BIMcloud vs. BIMcloud Basic: Feature Differences.

If you have selected BIMcloud Basic, use the dropdown list to select a single ARCHICAD version (starting with AC 19) to use with BIMcloud Basic. (BIMcloud Basic can support projects from only one ARCHICAD version.)

Set up Server Address

This address will uniquely identify your server, even if ARCHICAD is using a different address to connect.

See details at Connection Settings.

To use one of the server’s current addresses, click Show current addresses and pick the desired one. If you already set up the server’s address, you can enter it directly in the address field.
Keep in mind that if you use Dynamic IP Addresses at your office, then this address can easily change day by day. It is recommended to use a fixed IP address, a computer name, or a fully qualified domain name as the primary address.

You can change this address later, on the BIMcloud Manager’s Settings panel.

**Set Up Mail Server**

Use these fields to define the mail which will send information by email from the BIMcloud to the users. The mail server definition can be modified later in the browser-based BIMcloud Manager interface.

*Note:* Using a mail server is optional. You can click *Skip this Step.* However, if you don’t define a mail server here, you won’t be able to send emails (e.g. password reminders) to users from the BIMcloud.

Click **Continue** to finalize configuration.

If a BIMcloud Server is already installed on the computer, then the install process will automatically pair the new BIMcloud Manager with the existing BIMcloud Server.

If the computer does not have a BIMcloud Server installed, then you will have to manually pair the BIMcloud Manager and the BIMcloud Server.

See **Pair BIMcloud Server**.

**Configuration Complete**

It is recommended to log out now as the Master Administrator, and then log in with the user you created in the Create First User step (above). It is not recommended to use the Master Administrator account for everyday tasks.

**Open BIMcloud Manager**

You can open the BIMcloud Manager web interface from any computer which has network access to the BIMcloud. Do one of the following:

- Navigate to the same URL in your browser as you use in ARCHICAD
- From the BIMcloud tray application, click on BIMcloud Manager, then Open BIMcloud Manager command from the context menu
- From an ARCHICAD Teamwork project, use Teamwork > Project > Open BIMcloud Manager
The initial server administrator signs on as the Master Administrator (masteradmin), and has full access to all controls. He/she then proceeds to add users and assigns them roles and permissions as appropriate.

The first time you open a newly installed BIMcloud Manager, you must activate it free of charge, using your GRAPHISOFT ID.
BIMcloud Delta Cache

Note: Not available in BIMcloud Basic.

The BIMcloud Delta Cache component optimizes data transfer between the ARCHICAD clients and a BIMcloud Server by caching the data on the client side. Once an ARCHICAD client downloads a part of the project, the data will be cached locally by the BIMcloud Delta Cache and offered to the next ARCHICAD client who requests the same data.

Install Delta Cache

1. Launch the BIMcloud Installer wizard.
2. If you already have BIMcloud components installed: choose Install new BIMcloud or BIMcloud component. If this is a clean install, see the next step.
3. Choose Install single component, then click Next.

5. Continue and complete installation.
   
   For Mac users:
   
   – If you are installing BIMcloud on a Mac OS 10.15 system, you must choose a location that is in or underneath the Applications folder.
   – If you are installing BIMcloud on a Mac OS 10.15 system, you must grant Full Disk Access for BIMcloud. The BIMcloud Full Disk Access Tool appears automatically to guide you through the steps.

See this Help Center article for details.

Configure BIMcloud Delta Cache

BIMcloud Delta Cache configuration takes place after you install a new BIMcloud Delta Cache.

Enter the following parameters:

- **Port:** Select a free port or use the “Pick free port” command to automatically find one.
- **Cache folder:** The BIMcloud Delta Cache will store temporarily cached data in this folder. Enter its path or click Browse.
• Maximum Cache Size: Enter the maximum size for the cached data. The more space you allocate, the more effectively the BIMcloud Delta Cache will operate.

Click Start.

To start using the BIMcloud Delta Cache, enter its address in ARCHICAD (Options > Work Environment > Network and Update).
Reconfigure BIMcloud Components

To re-configure a BIMcloud component, locate the BIMcloud tray icon. Right-click, then find the component you need and click **Configure** from the available commands.

**Related Topics**
- BIMcloud Server Configuration
- BIMcloud Manager Configuration
Redefine Snapshot Folder

When you install BIMcloud, the BIMcloud Server Configurator settings define the location of your Project/Library Snapshots.
If needed, you can later redefine the Snapshots folder path.

1. From the BIMcloud Monitor tray icon, open the Configuration dialog for the BIMcloud Server.
2. The Configure dialog opens. Go to the BIMcloud Only page.
3. At Save Snapshots to External Folder, do one of the following:
   – Check the box and/or redefine the existing folder path
   – Uncheck the box: Snapshots will now be saved to their default location
4. You are prompted to click Restart.

At this point, you can decide whether to keep your existing Snapshots (by moving them to the new location), or else delete them.

Keep and Move Snapshots: Check this to move the existing Snapshots to the new folder you have just defined.
If you leave the box unchecked, any existing snapshots in the old location will be deleted.

Related Topics
BIMcloud Server Configuration
Snapshot Files Location
BIMcloud Licensing

Topics in this section:

BIMcloud User License
Using the Hardware License Key
Using a CodeMeter Server
**BIMcloud User License**

**Note:** Not relevant for BIMcloud Basic, for which User License is not required.

**Automatically Reserved License**
A BIMcloud User License is automatically reserved for each user who logs in to BIMcloud Manager for any reason.

**In Teamwork:**
You need a BIMcloud License to Share, Open or Join a Teamwork project from ARCHICAD or BIMx. The BIMcloud license remains in use until you leave the Teamwork project.

**Note:** If the user joins a project from both ARCHICAD and BIMx, then a single BIMcloud User License is sufficient; no additional license is required.

**In ARCHICAD (In a solo project):**
You need a BIMcloud License for the following ARCHICAD functions (even when you are working in a solo project), for as long as the relevant ARCHICAD dialog is open:
- Manage BIMcloud Libraries
- Publish to BIMcloud
- Hotlink file, Update Drawing, Import/Export file from or to BIMcloud
- All other functions involving BIMcloud Manager

The BIMcloud User License remains automatically reserved until you do one of the following:
- Close the relevant ARCHICAD dialog
- Close or log out of BIMcloud Manager
- Close ARCHICAD
- Go offline

Each BIMcloud User License is specific to a particular BIMcloud. If a user uses more than one BIMcloud, then he/she requires a separate BIMcloud User License for each.

If there are no more available BIMcloud User Licenses, then the user can only work offline.

**Assign BIMcloud User License Manually**
It is possible to manually **Assign** a BIMcloud User License to a particular user. A manually assigned BIMcloud User License remains permanently assigned to the user even after he/she closes all projects on the BIMcloud or goes offline.

An Administrator can **Revoke** a manually assigned license for any user, in BIMcloud Manager (either the Users page - Licenses Panel, or the Servers page - BIMcloud Manager - Settings Panel). If available, an automatic license is then reserved for this user.

**User Settings**

**Information on Available Licenses**
To view detailed information about the currently available/used licenses, open the BIMcloud Manager and navigate to the **Servers > BIMcloud Manager > Licenses** panel.

**BIMcloud Manager - Licenses Panel**
Using the Hardware License Key

After installing BIMcloud Manager, you should restart your computer before setting up the protection key. The hardware key must be accessible by the BIMcloud Manager. To ensure this, use one of the following methods:

- Connect the key to the BIMcloud Manager computer’s USB port.
- Connect the key to a different computer and install a CodeMeter Server on it, which will provide access to the license for the BIMcloud Manager computer.

**Notes:**
- This CodeMeter Server can be the same one already used by the other GRAPHISOFT products in the office.
- Whenever CodeMeter is updated on your computer, you must restart BIMcloud Manager and BIMcloud Server. Failure to do so may affect backup/snapshot creation.

Programming the Hardware License Key


If you have recently purchased the GRAPHISOFT BIMcloud Solution, you will receive an empty CodeMeter key that you must “load” through the licensing site.

**Related Topic:**

Using a CodeMeter Server
Using a CodeMeter Server

System Requirements for a CodeMeter Server
The CodeMeter server is part of the CodeMeter driver, so you only need to select a computer on your network that will act as a CodeMeter server. To set up a CodeMeter server as a network license server, you will need the following:

• A computer with network connection (should be running during work hours).
• The computer must have at least three free USB ports.
• CodeMeter driver must be installed.

Note: There is no need for a server-level operating system for the CodeMeter server. You can use one of the workstations as a CodeMeter server; you must keep it running during work hours.

Set Up the Server
After you have your server running and the CodeMeter driver is installed, start the server as described below:

All CodeMeter settings can be managed in CodeMeter WebAdmin. To start it: Open CodeMeter Center (from Applications or using the Start menu) and click on WebAdmin or simply open localhost:22350 on your browser.

To enable the CodeMeter server:
1. Go to Configuration/Network tab.
2. Check Run Network Server checkbox.
3. Do not forget to Apply the changes.

From that point, the server runs and shares licenses on the local network.

– Important Note: Whenever CodeMeter is updated on your computer, you must restart BIMcloud Manager and BIMcloud Server. Failure to do so may affect backup/snapshot creation.

Client Side Settings
All clients on the local network should find the server automatically. In case this does not work (e.g. your server is in a different subnet, or you are connecting remotely through the Internet), then you may need to specify the server's hostname IP address. On the client:

1. Open WebAdmin.
2. Configuration/Network.
3. Add the server to the Server Search List.

This field can have multiple entries; the client searches for available licenses in the specified order and only on the specified servers. Only when the list is empty does the client search for other available servers.

Access Control
With the default settings, all computers on the same local network (same subnet) can use a license from the server.

To restrict access:
• Open WebAdmin.
• Go to Configuration/Access Control.

If the Clients' list is empty, anyone on the local network can use a license. If at least one entry is listed here, only the listed entries can request a license.
**Note:** If the server is public on the Internet, or no one is allowed to use a license, make sure that this list is filled out correctly to avoid unwanted license usage.

You may want to check who is using a license:

1. Open WebAdmin on the server computer.
2. Go to Server/User tab.

Here you can see a list of active clients and clients who have borrowed licenses.

**Related Topic:**

*Using the Hardware License Key*
Upgrade from BIMcloud Basic to BIMcloud

Note: To use this option, you must log in as Master Administrator.

Follow these steps to upgrade your BIMcloud Basic to BIMcloud.

1. Go to the Servers page of BIMcloud Manager.
2. From BIMcloud Basic Manager, open the Licenses page.
3. Click Start Upgrade.
Downgrade from BIMcloud to BIMcloud Basic

Note: To complete this process, you must log in as Master Administrator.

Follow these steps to downgrade the full BIMcloud to the BIMcloud Basic version.

1. Log in as Master Administrator.
2. Alert all users who are connected to the BIMcloud that they must save their work. Access to the server will be locked during the downgrade process!
3. Go to the Servers page of BIMcloud Manager.
4. Select the BIMcloud Manager Server.
5. Open the Licenses page.
6. Click Downgrade.

As part of the downgrade process, you must reconfigure certain Manager definitions, because downgrading involves the loss of certain features that are not available in BIMcloud Basic. The built-in Downgrade Wizard will take you through this step by step.

7. A Warning dialog appears so you can confirm that you want to proceed.
8. Click **Start Downgrade**. This launches the Downgrade Wizard.

**Using the Downgrade Wizard**

- The Downgrade Wizard appears at the edge of your screen, prompting you to complete each step.
- For the current step, click **Check**.
- If this step applies to you, it will be shown with a red warning triangle, and you are automatically taken to the right page of BIMcloud Manager, where you can adjust the settings as directed.
- When you complete the step, click **Check** again. If everything is OK, the red warning changes to a checkmark, and you can move to the next applicable step.

- If a certain step is not applicable (e.g. you have no subfolders that need removing), it is grey.
• To abort the Downgrade process, click X in the progress bar at the top of the Wizard.

STEP 1: Create Backups
Make sure you have backups of your BIMcloud Manager and BIMcloud Servers.
If you abort the downgrade process before completing it, you must use these backups to restore the original state of the BIMcloud.

STEP 2: Lock Version
BIMcloud Basic can support only one version of ARCHICAD. Once you choose your preferred ARCHICAD version, your BIMcloud Basic will be able to host only Teamwork projects that were created in that version. For example, if you lock to version 22, then your BIMcloud Basic can host only ARCHICAD 22 Teamwork projects.
1. Go to BIMcloud Manager > Settings > Status. (Or click Check in the Downgrade Wizard to take you there.)
2. At Supported Teamwork project version: Choose the single ARCHICAD version to support.
STEP 3: Delete Incompatible Teamwork Projects

In the previous step, you locked BIMcloud Basic to a particular ARCHICAD version. Now you must delete all incompatible Teamwork projects from BIMcloud Manager - that is, all projects shared from other ARCHICAD versions:

1. Go to the Projects page of BIMcloud Manager. (Or click **Check** in the Downgrade Wizard to take you there.)

2. Select the Teamwork Project(s) to delete.

3. Click **Delete**.
STEP 4: Move Teamwork Projects
BIMcloud Basic supports only one level of folders in the Projects Root.
If your Teamwork Projects are located in lower-level sub-folders, you must move them now:
1. Go to the Projects page of BIMcloud Manager.
2. Select any Project(s) that are located in sub-folders. (Or click Check in the Downgrade Wizard to take you there.)
3. Click Move, then select a target folder: either the Projects Root, or else another folder that is one level below.

STEP 5: Move Libraries
In BIMcloud Basic, Libraries can be located only in the default Libraries folder.
If you have Libraries in other folders, you must move them now to the default Libraries location.
1. Go to the Projects page of BIMcloud Manager. (Or click Check in the Downgrade Wizard to take you there.)
2. Select any Library located in a non-default location.
3. Click Move, then select the default Libraries folder.

STEP 6: Eliminate BIMcloud Projects
BIMcloud Basic does not support BIMcloud Projects.
If your Projects page contains any BIMcloud Projects, you must convert them to folders now. The contents will remain in the folder, but the Teams definitions of the BIMcloud Projects will be eliminated.
1. Go to the Projects page of BIMcloud Manager. (Or click Check in the Downgrade Wizard to take you to the Convert to folder command.)
2. Select any BIMcloud Projects.
3. For each, click Convert to folder.
STEP 7: Download, then Remove File(s)

BIMcloud Basic does not support the upload of files to the BIMcloud.

1. Go to the Projects page of BIMcloud Manager. (Or click Check in the Downgrade Wizard to take you there.)

2. Select every uploaded file and click Download files, so you have local saved copies.

3. Then click Delete to remove them from BIMcloud Manager.
STEP 8: Eliminate Sub-Folders

BIMcloud Basic supports only one level of folders in the Projects Root.

If your Projects page contains any sub-folders, you must delete them now:

**Note:** These sub-folders are now empty: in the previous steps, you moved any projects or libraries they had contained.

1. Go to the Projects page of BIMcloud Manager. (Or click **Check** in the Downgrade Wizard to take you there.)
2. Select any sub-folders.
3. Click **Delete**.

STEP 9: Delete All Tags

Tags and the My Tags page of BIMcloud Manager are not available in BIMcloud Basic. This step will delete and remove all tags you have assigned to Project/Library items.

1. Go to the Projects page of BIMcloud Manager. (Or click **Check** in the Downgrade Wizard to take you there.)
2. You are prompted to Delete All Tags.
STEP 10: Delete All Subscriptions
Change subscriptions are not available in BIMcloud Basic. This step will delete all subscriptions of all users.
1. Go to the Projects page of BIMcloud Manager. (Or click Check in the Downgrade Wizard to take you there.)
2. You are prompted to Delete All.

STEP 11: Disconnect BIMcloud Servers
BIMcloud Basic can connect to only a single BIMcloud Server. In this step, remove all extra BIMcloud Servers, so that only one remains.
1. Go to the Servers page of BIMcloud Manager (Or click Check in the Downgrade Wizard to take you there.)
2. Select the BIMcloud Server that will no longer be used
3. Click Disconnect.

STEP 12: Disable external Snapshot folder
The option to save Snapshots to an external folder is not available in BIMcloud Basic. If you have activated this option in BIMcloud, you must now disable it, in order to use BIMcloud Basic. If you do not disable it, your BIMcloud server will go offline after the downgrade!
1. Open the BIMcloud Server Configurator from the tray icon:
2. The Configure dialog box opens. Click Next to open the BIMcloud Only settings page.
3. Uncheck the box to Save Snapshots.

**STEPS 13 and 14: Move BIMcloud Server and/or BIMcloud Manager**

BIMcloud Basic does not support folders on the Servers page. If your BIMcloud Server or BIMcloud Manager is located in a folder, you must move it to the Servers Root:

1. Go to the Servers page of BIMcloud Manager (Or click **Check** in the Downgrade Wizard to take you there).

2. Select the Server that is located in a folder.

3. Click **Move to Folder**, and choose the Servers Root.
**STEP 15: Eliminate Folders from Server Root**

BIMcloud Basic does not support folders in the Server Root.

**Note:** These folders are now empty: in the previous steps, you moved any servers they had contained.

1. Go to the Servers page of BIMcloud Manager (Or click **Check** in the Downgrade Wizard to take you there).
2. Select the folders.
3. Click **Delete**.

![Image of BIMcloud Manager with servers selected and delete option highlighted](image)

**STEP 16: Change to Simplified Permissions**

In BIMcloud Basic, only Simplified Permissions mode is available.

1. On the Servers page, select the BIMcloud Manager (Or click **Check** in the Downgrade Wizard to take you there).
2. In General Settings, click **Edit**, and choose the **Simplified** option at **Management Roles**.
3. Click **Save**.

![Image of BIMcloud Manager with simplified permissions highlighted](image)
**STEP 17: Disconnect LDAP Services**

LDAP is not available in BIMcloud Basic.

1. On the Servers page, select the BIMcloud Manager and go to the LDAP page (Or click **Check** in the Downgrade Wizard to take you there).

2. Select the Directory service from the list and click **Disconnect**.

**Complete Downgrade**

As shown in the Wizard, you have successfully completed all the steps required for downgrade.

Click **Downgrade** to complete.
Uninstall BIMcloud

Each BIMcloud component can be uninstalled independently.
However, if you uninstall the BIMcloud Manager, then you will not be able to work on any of the previously connected BIMcloud Servers unless you reconnect them to a different BIMcloud Manager.

To uninstall a BIMcloud component,

• Go to the BIMcloud Tray Application and use Remove Component from the item’s context menu; or
• Use the Uninstall shortcut located in the component's install folder
BIMcloud Manager

Manager Web Interface
Projects Page
Users Page
Roles Page
My Tags
Servers Page
Hosted Teamwork Projects/Libraries
Access Panel
Permission Management: Simplified and Detailed
List of Permissions
Activities Panel
System Notifications
List of System Notifications
Connection Settings
BIMcloud Tray Icon
Manager Web Interface

This web interface is the main control center of your BIMcloud. It is designed to help you fulfill all management tasks related to the BIMcloud. Also, it is a flexible tool in the hand of all users to review their own settings and get information about the projects they are currently working on.

You can open the BIMcloud Manager web interface from any computer which has network access to the BIMcloud. Use the same URL in your browser as you use in ARCHICAD.

The initial server administrator signs on as the Master Administrator (masteradmin), and has full access to all controls. He/she then proceeds to add users and assigns them roles and permissions as appropriate.

Certain functions described in this manual are not available in BIMcloud Basic.

See [BIMcloud vs. BIMcloud Basic: Feature Differences](#).

Components of the Manager Web Interface are described below:

- **Home Screen**
- **Content Types**
- **Header**
- **Navigator: Display, Select, Filter and Search Items**
- **Summary**
- **Panels**
- **Background Jobs**
- **Settings Inheritance**
Home Screen

The Home Screen is the main landing page of the BIMcloud Manager web interface. This will automatically open after a successful login. You can return to this page at any time by clicking the Home button from the breadcrumbs.

This page provides a shortcut to current Notifications and to your current joined projects on the BIMcloud. The icons at the top are shortcuts to the different content types.

The Home page also contains the server's address, which can be used from ARCHICAD to connect to BIMcloud.
Content Types

Each BIMcloud content type has its own properties and functions. The content types are separated from each other in the web interface, but their interrelationships are reflected in a number of logical weblinks between the content types.

Content types:
- Projects
- Users (and Groups)
- Roles
- My Tags
- Servers
- Dashboard (visible to Server Administrators by default)

Note: Previous BIMcloud versions also used the “Libraries” content type. However, libraries are now listed with Projects. If your BIMcloud interface still shows the Libraries page, navigate to it and click “Don’t Show Again” to remove it from the interface.

Click on the link you wish to view.

Although there are different content types, their basic behavior is similar no matter what you are viewing or editing. Generally, the web page interface is divided into four parts:
- Header
- Navigator
- Summary
- Settings/Details
Header

The header contains notifications about the BIMcloud and shortcuts for different settings.

Next to the name of the BIMcloud is a pop-up with the following information:

- Currently running job(s)
- Warning(s) and information about the BIMcloud
- Shortcut to the BIMcloud Manager settings

Note: The content of this pop-up changes depending on your permissions.

On the right side of the header is your avatar and name, with a pop-up:

- **User settings** takes you to your own user page.
- **Change Language** affects the language of the web interface. (This language change does not affect the other users; it is your personal setting.)
- **Log out**

The Help link on the far right side opens the BIMcloud help.

Use the pop-up in the breadcrumb to quickly switch between the different content types.
If you create a Bookmark in your browser, then it will always return you to the page represented by your breadcrumb (including the currently active panel and even search results).
Navigator: Display, Select, Filter and Search Items

The Navigator lists all elements of the currently selected content type (for example, “Projects”). Each Content type has a Root item, which acts as a folder in the Navigator.

Click an element to select it and display further information about it.

Note: Depending on your permissions, the elements you see here, and the information displayed, can vary.

Navigator Layouts

Use the arrows on the right side of the Navigator to switch between three different layouts:

- Single Column
- Hidden
- Expanded
Expanded Layout

Expanded Layout shows more detailed information in a table format. You can sort the columns to find the information you are looking for.

![Expanded Layout Table Example](image)

Layout Limitations for Small Screen Devices

- Expanded layout is not available due to the lack of horizontal space
- The Navigator automatically hides itself after a successful item selection

Display Navigator Items (Tree vs. Flat)

On the Projects and Servers page: The Navigator can display items in either a hierarchical Tree view or as a Flat list:

![Display Navigator Items](image)

All items are displayed in a flat list regardless of their position in the hierarchy. However, the item's path in the hierarchy is displayed in a second line.

The Roles, Users and Tags pages use a flat list only.
Select/Multi-select Navigator Items

- **Select** an element by clicking on it.
- **Multi-select**: Activate multi-selection by clicking the checkmark icon on the top left of the list.
Filter Navigator Items

- **Filter** items using the pop-up. The available quick filters depend on the currently selected content type.

Search Navigator Items

Click the Search icon and enter a text, then click Enter.

Click X to cancel the Search.

Search results are always displayed in a flat list.

Related Topics:

- Focus on Folder
- Filter Items by Date
- Find Items by Tag
Summary

The Summary, displayed to the right of the Navigator, provides key functions and a quick overview about the selected item.
The Summary has the following sections:

- **Name**
- **Tags (on the Projects page only)**: Shows any tags assigned to the item. Tag management commands are also available here.
- **Functions**: These vary depending on the content type.
- **Quick information**: Displayed in multiple rows. Most of the rows also act as a link to a page, where further information is available. If you do not have permission to view further details about a linked item, then the link is blocked.
- **Joined users/projects**:
  - For a selected User (Users page only): the projects the user has joined.
  - For a selected Project (Projects page only): the users who have joined this project.
Panels

Panels (e.g. Settings, Activities, Access) display and allow editing of all the parameters and properties of the selected item(s).

Information in each panel may be organized into several sections. Click the Edit button on the section header to edit its content. Click Save or Cancel to complete editing.

**Note:** Only one section can be edited at a time.

In some cases, the Edit command opens an additional Details panel, with additional editing options. Close this temporary panel by clicking the X icon on its tab.

All panel controls of each BIMcloud page are described in the following sections:

- Projects Page
- Users Page
- Roles Page
- My Tags
- Servers Page
- Hosted Teamwork Projects/Libraries
- Access Panel
- Activities Panel
**Background Jobs**

Most functions will complete instantly when they are clicked, but some take longer. In these cases, the process will turn into a background job; the user can keep working.

Multiple background jobs can run at the same time. Typically you will only see the background jobs started by you.

You will receive a notification if a clicked function has become a background job. While the job is running, you will see a progress indicator progress in the BIMcloud Manager header pop-up.

You are also notified once the background job is complete, with information on whether the job was completed successfully or encountered errors.
Settings Inheritance

The BIMcloud allows you to set up generic rules for a group of items by arranging them into a hierarchy and applying the settings at a higher level: items at a lower hierarchical level inherit settings from those at a higher level.

Settings for the Root element of the content type will be inherited by all items of that content type. For example, settings on the Project Root are inherited by all Teamwork Projects by default. The inherited settings can be overridden at lower levels, if you have the necessary permissions.

See *Inheritance of Access Rights*.

**Note:** Not all content types can be organized into a hierarchy. In those cases (e.g. Users, Roles), the only hierarchy is between the Root item and all the others. For these content types, too, settings applied to the Root will be inherited by all child items.
Projects Page

Use the Projects page of BIMcloud Manager to organize and manage the following items to which you have access:

- Teamwork Projects
- BIMcloud Projects
- Folders (regular folders and library folders)
- BIMcloud Libraries
- Uploaded files

You can organize these items into any folder hierarchy as needed, e.g. all projects belonging to a studio go into one folder, or all libraries into one folder. (Use the Move command to organize items: see Move Item.)

The Projects page of BIMcloud Manager can contain two distinct types of projects:

**Teamwork Projects**

A design project shared from ARCHICAD to the BIMcloud, and used in Teamwork. Teamwork Projects are listed on the Projects page of BIMcloud Manager, at any level of the folder hierarchy.
**BIMcloud Projects**

A folder-like container, created on the Projects page of BIMcloud Manager. Use a BIMcloud Project to store (for example) Teamwork Projects, files of any format, and sub-folders in one place. Unlike regular folders, BIMcloud Projects can have unique Teams of users assigned to them and/or to their sub-items.

For more information, see *BIMcloud Project*.

**Uploaded Files**

The BIMcloud Projects page can contain sub-folders and files of any type - including ARCHICAD project files (such as MOD, PMK), PDFs, Excel files, and image files.

See *Upload Folder or File to BIMcloud*.

**Remember:** A PLN file uploaded to BIMcloud is not the same as a shared Teamwork Project. Even if you upload a PLN file to the BIMcloud, you cannot use it for Teamwork. To create a Teamwork project, you must share the project from ARCHICAD.

**Permissions for Teamwork Projects**

Permissions for specific Teamwork Projects contain ARCHICAD level permissions as well. If a user Joins a project from ARCHICAD, then the permissions granted on the project's access panel will control what he/she can do in ARCHICAD.

- **Required permissions to Join a project using ARCHICAD:**
  - Simplified management:
    - Project/Server Administrator management role or
    - Any user who has been added to the project’s Access list (even without any further permissions)
  - Detailed management:
    - Any user who has View item permission for the project. (Traversing applies)

- **Required permissions to work from ARCHICAD:**
  - Use the ARCHICAD permissions to control what each individual user can do in ARCHICAD (*see ARCHICAD Related Permissions*)

**Related Topics:**

Projects Navigator
Functions on the Projects Page
Summary on the Projects Page
Panels
Project/Library Snapshot and Restore
BIMcloud Project
My Tags
Projects Navigator

Filters

The following filters are available to narrow down the items displayed in the Navigator:

- **Show All**: all projects, libraries and folders, or
- a particular category only

Focus on Folder

Click the focus icon on a folder item to limit the displayed items to the folder’s child elements. The Filter pop-up changes: the filters only apply to the focused branch of the hierarchy.

Focus on Folder Item
Filter Items by Date

In the List view of the Projects Page of BIMcloud Manager:
Click the calendar to set a date range to filter the list by their last modified date.

Filter Items on Project Page by Date Modified
Expanded View

In the expanded view, the following columns are available:

- Tags used (by color)
- Number of Joined users
- Version (for Teamwork Project)
- Project size (Total size for folders or BIMcloud Projects)
- Last snapshot
- Modified date
- Host server

Use these columns to quickly sort among your projects and files. Switch to flat list view to sort globally (otherwise it sorts within folders only).
Functions on the Projects Page

Available functions for Projects vary depending on what you have selected in the Navigator: Root, Folder, Teamwork Project, BIMcloud Project, file, or Library.

<table>
<thead>
<tr>
<th>Function</th>
<th>Root</th>
<th>Folder/Library Folder</th>
<th>BIMcloud Project</th>
<th>Teamwork Project</th>
<th>File</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscribe to Changes</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Manage Tags</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Create Folder</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Create BIMcloud Project</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TW Project Status</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duplicate</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Move</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Change host</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Convert to Folder</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Convert to BIMcloud Project</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export (TW Project or Library)</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Export to CSV</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload (file, folder)</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download (files)</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Import (TW Project or Library)</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Each function is described in the following sections:

- **My Tags**
- **Create Folder**
- **Subscribe to Changes**
- **Upload Folder or File to BIMcloud**
- **Teamwork Project Status**
- **Duplicate Item**
- **Move Item**
- **Change Host Server**
- **Convert BIMcloud Project to Folder**
- **Create BIMcloud Project**
- **Export Teamwork Project or Library**
- **Import Teamwork Project or Library**
- **Delete Item from Projects Page**
- **Force Leave All Users from Teamwork Project**

<table>
<thead>
<tr>
<th>Root</th>
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<th>Teamwork Project</th>
<th>File</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Force Leave all</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
</tr>
</tbody>
</table>
Subscribe to Changes

**Note:** Not available for Master Administrator.

Keep track of changes made to the files and folders on BIMcloud by subscribing to these items in the Projects page of BIMcloud Manager. “Folder” can be a regular folder, a BIMcloud Project, or a Library folder.

Once you subscribe to a file or folder, you get a notification whenever that file is modified, or (for a folder) whenever any of its files are modified. (See [What counts as a Modification?](#))

Changes to Teamwork Projects or Libraries are **not tracked** on BIMcloud, and you cannot subscribe to these items.

**How to Subscribe or Unsubscribe**

On the Projects page of BIMcloud Manager:

Select the file(s) or folder(s), then click the bell icon.

![Airport Terminal](image)

**Click to Subscribe**

You are now subscribed.

You can only subscribe to an item if you have permission to view it. All such items have a bell icon.

**Note:** If you can see a folder only because of traversing, you cannot subscribe to that folder - you must have explicit view permissions.

![Airport Terminal](image)

**Subscription Activated**

To unsubscribe, just click the bell again.

Subscriptions are for personal use: no one else can see what you have subscribed to. Managers cannot centrally create subscriptions for users.
Note: Signing up for Change subscriptions is different from enabling System Notifications, which alert you to issues related to the functioning of the BIMcloud servers. See System Notifications

What counts as a Modification?
For the items you subscribed to, you receive a notification whenever its Modified date has changed.

For a subscribed file, the following events will trigger a notification:

- Rollback file
- Move
- Upload new version
- Rename

For a subscribed folder, the following events will trigger a notification:

- Upload new file
- Upload new version of a file
- Move existing file into this folder
- Move existing folder (which is not empty) into this folder
- Move this folder elsewhere
  - Note: If the folder is moved to a location where the subscribed user has no view permissions, he/she will not see the notification until view permissions are granted.
- Rename
- Rollback folder (Exception: no change is logged if the Rollback only results in deleted files, and no existing file is replaced.)

Related Topics:

System Notifications
Create Folder

Creates a folder inside the currently selected folder. This function is available if the Projects root folder or any other folder is selected.

Click **Create Folder** and enter the new folder name in the appearing dialog. Make sure the new folder name is unique within this folder.

*Required permissions to create folders:*

- Simplified management: **Project/Server administrator**
- Detailed management:
  - **Modify folder content** for the parent folder (or root)
Upload Folder or File to BIMcloud

The BIMcloud Projects page can contain sub-folders and files of any type - including ARCHICAD project files (such as MOD, PMK), PDFs, Excel files, and image files.

1. Go to the Projects page of BIMcloud Manager.
2. From any selected item in the Projects tree: click **Upload File** or **Upload Folder**.
   - If a folder is selected: The Upload folder command is under the **More...** button.
   - The Upload folder command is not available if you are using Internet Explorer.
3. From the dialog, click **Choose Files** to browse for the items.
4. Click **Upload**.

**Important:** A PLN file uploaded to BIMcloud is not the same as a shared Teamwork Project. An uploaded PLN file cannot be used in Teamwork.

To create a Teamwork project, you must share the project from ARCHICAD.
File Exchange with ARCHICAD

From ARCHICAD, you can publish or export the entire model or any Publisher items directly to the BIMcloud.

As always, you must log in to a running BIMcloud as a valid user with appropriate permissions, and you must choose a destination folder to which you have permission.

Do any of the following from ARCHICAD:

- Use **File > Export to BIMcloud**. This uploads the current model to the BIMcloud in a variety of formats.
- Use the **Publisher** to set up one or more Publishing sets or items. In the **Publisher Set Properties** dialog, use the Browse button to choose “To BIMcloud”.
- From **Issue Organizer**, select and export Issues to BIMcloud in BCF format.

ARCHICAD can directly access all files uploaded to BIMcloud. For example:

- Place and update hotlinked models directly from BIMcloud
- Place and update any drawing (e.g.: DWG, DXF) directly from BIMcloud
- Merge any drawing or model into the current project from BIMcloud (File > Interoperability > Merge from BIMcloud)

**Related Topic:**

File/Folder Versions Panel
Teamwork Project Status

For a selected Teamwork Project on the Project Page of BIMcloud:
The Status control reflects
• whether its host server is running and accessible
• whether its data is available on the host server
• whether the Teamwork Project is accessible or locked

The popup contains different commands for the different statuses:
• **Lock / Unlock** depending on its lock status.
• **Link to…**: If the project’s data is not found on the host server, then it can be re-linked to a different, currently unused project.

See *Hosted Teamwork Projects/Libraries.*

Required permissions:
- Simplified management: **Server/Project administrator**
- Detailed management: **Lock/Unlock project**

Teamwork Projects are accessible by default.

---

**Lock/Unlock Project**
The Lock function is designed to “freeze” the project data for a short period while an administrator carries out management functions.

While a project is locked, joined users cannot send/receive changes or make any changes in project data.

A project is also locked automatically when you migrate a Teamwork project from one version to another.
(Teamwork > Migrate Project)
A locked project is listed with a red badge in the navigator:

Locked Project

Similarly, a locked project is shown with a lock icon in ARCHICAD’s Open/Join Teamwork Project dialog box. Once the project is unlocked, users can again work in the project and send/receive changes.
Duplicate Item

The Duplicate function is available on the BIMcloud Projects page for all items except the Project Root. If a folder is duplicated, then all its child items will be duplicated. The newly created items will inherit both the original permissions and their new parent’s permissions.

1. Select the existing item.
2. Click **Duplicate** from the Functions area.
3. In the appearing dialog, give the duplicate item a new name.
4. Choose a folder location for the duplicate.
5. Click **Duplicate** to create the copy.

*Required permissions:*
- Simplified management: **Server/Project administrator**
- Detailed management:
  - **Modify folder content** for the parent folder (or root)
Move Item

Moves the selected item(s) to a new folder.

The Move function is available on the BIMcloud Projects page for all items except the Project Root. If you are moving a folder, this will also move the folder's child item(s).

Click **Move** and pick a folder to which to move the item.

**Note:** The folder picker will contain all the folders you can see in the Navigator. To select a folder as a destination, you must have permission to modify its content.

**Required permissions:**

- Simplified management: Server/Project Administrator
- Detailed management:
  - **Delete/Remove folder content** for the parent of the selected item
  - **Modify folder content** for the target folder
Change Host Server

Use **Change Host** to move a data of a Teamwork Project or Library from one host server to another on the BIMcloud.

As a result, the Teamwork Project will temporarily be offline for the Joined users, but once the process is complete, the Teamwork Project will be online again and they can send in changes.

⚠️ Required permissions:
- Simplified management: Server Administrator
- Detailed management:
  - **Modify** hosted content for the Source and Target host servers
Convert BIMcloud Project to Folder

if you downgrade to BIMcloud Basic, you must convert any existing BIMcloud Projects to a regular folder, because BIMcloud Basic does not support BIMcloud Projects. For this reason, the downgrade process will prompt you to use this command.

See Downgrade from BIMcloud to BIMcloud Basic.

On the Projects page of BIMcloud Manager:

1. Select the BIMcloud Project
2. Click the More... command, then Convert to folder.

Converting a BIMcloud Project to a folder means that its Teams and related access definitions will be lost. (Teams are relevant only to BIMcloud Projects - they have no meaning for regular folders or other items on the BIMcloud).

Related Topic:
Convert Folder to BIMcloud Project
Convert Folder to BIMcloud Project

On the Projects page of BIMcloud Manager:

1. Select the folder
2. Click the More... command, then Convert to BIMcloud Project.

You can now create and assign Teams for the new BIMcloud Project.

Related Topic:

Convert BIMcloud Project to Folder
Import Teamwork Project or Library

Use the Import function to import a Teamwork Project file (extension .BIMProject) or a Library file (.BIMLibrary) into a selected folder on BIMcloud.

These file formats are available if you either:
- Exported a Teamwork Project/library from the BIMcloud (see Export Teamwork Project or Library, below)
- Created a Project or Library snapshot (see Project/Library Snapshot and Restore.)

1. In the Navigator, select any folder (Project Root, BIMcloud Project or regular folder).
2. From the Projects pop-up or the Functions area, click Import.

3. Click Choose File, then browse for the file (.BIMProject or .BIMLibrary) you wish to import.
4. Select a host server as destination.
5. Click **Import**.

You can also import a file with the .archive extension (these are saved Snapshots). In this case, the dialog will prompt you to specify whether the file is a project or a library.

**Required permissions:**

- **Simplified management:** Server administrator
- **Detailed management:**
  - Modify folder content
  - Modify details
Export Teamwork Project or Library

Use this function to download a Teamwork Project or Library to your computer, with file format .BIMProject or .BIMLibrary).

1. In the Navigator, select a Teamwork Project or a Library.

2. From the Functions area, click More, then Export.

3. If needed, check options to include snapshots in the exported file.

Browse for the file destination if your browser requires it. Otherwise the exported file will be downloaded into your default download folder.

Related Topics:
Export List of Folder Contents in CSV Format
Import Teamwork Project or Library
Export List of Folder Contents in CSV Format

Use this function to export a list of contents (Teamwork Project or Library) of any folder (Project Root, BIMcloud Project or regular folder).

A list of the folder contents (Teamwork Projects and all libraries with their key data) are downloaded in CSV format, in a zipped folder. The list can be opened in Excel.

1. In the Navigator, select any folder.
2. From the Functions area, click More, then Export to CSV.

Related Topic:
- Export Teamwork Project or Library
- File/Folder Versions Panel
Delete Item from Projects Page

Deletes the selected item. If a folder is selected, all of its contents will be deleted along with the folder!

Required permissions:

- Simplified management: Project/Server administrator
- Detailed management: Delete/Remove folder content for Parent folder and all of its subfolders
Force Leave All Users from Teamwork Project

1. Select one or more Teamwork Projects in the Navigator.
2. Click **Force leave all**.

This results in Force Leave for all users who are joined into the selected Teamwork Project(s).

See also *Force Leave Selected User(s)*.

- Required permissions to force leave a user from a project:
  - Simplified management: **Project or Server administrator**
  - Detailed management: **Modify access** for the project
Summary on the Projects Page

Summary information is shown for each selected item in the Navigator (Root, Folder, Project or Library).

<table>
<thead>
<tr>
<th></th>
<th>Root</th>
<th>Folder</th>
<th>BIMcloud Project</th>
<th>Teamwork Project</th>
<th>File</th>
<th>Library</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td>ARCHICAD program version</td>
</tr>
<tr>
<td>Current version</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>Current version number of the selected item (e.g. if you have uploaded multiple versions of the file)</td>
</tr>
<tr>
<td>Size</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Size of selected project; or Total size of all projects (viewable by me) in the selected folder</td>
</tr>
<tr>
<td>Modified</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Date/time of last modification</td>
</tr>
<tr>
<td>Last TW Project Snapshot</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td></td>
<td>Date of last TW Project snapshot</td>
</tr>
<tr>
<td>Last PLN Snapshot</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>Date of last PLN snapshot</td>
</tr>
</tbody>
</table>
As applicable, click on an item to navigate to the relevant page of BIMcloud Manager (for example, click on the Host Server item to open the Servers page.)

<table>
<thead>
<tr>
<th>Root</th>
<th>Folder</th>
<th>BIMcloud Project</th>
<th>Teamwork Project</th>
<th>File</th>
<th>Library</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Server</td>
<td></td>
<td></td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Name of BIMcloud Server hosting this item</td>
</tr>
<tr>
<td>Number and List of Joined users</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>+</td>
<td>The users who have joined this Teamwork Project</td>
</tr>
</tbody>
</table>

As applicable, click on an item to navigate to the relevant page of BIMcloud Manager (for example, click on the Host Server item to open the Servers page.)
 Joined Users

The users listed in this section are currently Joined to the Teamwork Project. The color of the dot indicates each user’s status for this project:

- **Online:** Blue
- **Offline:** Gray

Icons next to each user name indicate the type of client application on which the user is working (e.g. ARCHICAD or mobile BIMx application).
Force Leave Selected User(s)

1. Select one or more projects in the Navigator.
2. In the Joined users list, hover over a user name to display the **Force Leave** icon.
3. Click to Force Leave.
**Force Leave multiple users**

1. In the Joined user(s) list, click the checkmark above the list to enable checkboxes.

2. Check users whom you want to Force Leave from the project: The “Force Leave selected” button is enabled.

3. Click “Force leave selected.”

See also [Force Leave All Users from Teamwork Project](#).

**Note:** Force Leaving a user is immediate; the user will not be able to send in his/her changes. A Force Leaved user can re-join the project immediately without further restrictions. If you would like to prevent the user from re-joining the project, revoke his/her permissions on the project’s access panel.

- Required permissions to force leave a user from a project:
  - Simplified management: **Project or Server administrator**
  - Detailed management: **Modify access** for the project
Panels

Available Panels on the Projects Page and their content may vary, depending on what is selected in the Navigator:

- Project Root
- Teamwork Project
- BIMcloud Project
- Folder (regular folder or library folder)
- Library
- Uploaded file

Panels of the Project Root

See details on panel controls in the sections below:

Project Settings Panel
Snapshots Panel
File/Folder Versions Panel
View Panel
Project Settings Panel

- Required permissions to edit settings:
  - Simplified management: Server administrator
  - Detailed management:
    - **Modify details** for the selected item
    - Only those **BIMcloud Servers** appear in the default host server pop-up for which the current user has **Modify hosted data permission**

**Name**

Name of the selected project, library, folder or file.

**Note on Teamwork Project Name:** Use a different name for each Teamwork project. Do not use the same name as that of an existing project, even if the letter cases are different (e.g. ParkingGarage and PARKINGGARAGE). If you do, users may not be able to Open or Join the project they need.

**Library Folder**

Available at the Project Root or a selected folder.

This is the default Libraries folder for the selected item.

When you share a Teamwork project from ARCHICAD, the Share process (Libraries dialog) either uploads the project libraries to a folder on the BIMcloud, or links the project to existing BIMcloud libraries. By default, the Teamwork Share process uploads or links libraries to the Library Folder shown here.

At the Project Root, this folder is created automatically and cannot be deleted or changed.

For a selected folder, you can change its default Library folder:

1. Click **Edit**.
2. From the Library Folder pop-up:
   - Choose **Select folder** to pick a different folder as the default, or
   - **Defined manually from ARCHICAD**: with this setting, the Share process from ARCHICAD requires the user to specify a Library folder on BIMcloud.
Default Server(s) for Teamwork Projects

When a user shares a project from ARCHICAD, and places it in the currently selected BIMcloud folder, the project will be automatically hosted by the BIMcloud Server chosen here.

You can set separate default host servers for different versions of ARCHICAD, or use a single default server for all ARCHICAD versions.

To change defaults, click **Edit**.

Click **Assign** to open a dialog to set separate default host servers for any or all different versions of ARCHICAD.

For all other ARCHICAD versions (to which you did not assign a particular host server): use the default, or click the pop-up to assign a different host server.

Default Server for Files

Displays the name of the BIMcloud Server that hosts the files you have uploaded to the BIMcloud. This server is automatically selected and configured during the BIMcloud installation process.

You cannot change this server here. To change the File Server (master admin only), go to the Servers page of BIMcloud Manager.
Snapshots Panel

Available for selected Teamwork project, library, or folder. Use the controls on the Snapshots panel to schedule, create and manage snapshots (backups) of the selected Teamwork project or library.

- Required permissions to work with existing snapshots:
  - Simplified management: Project or Server administrator
  - Detailed management: Modify details for the selected item

A snapshot can be of three kinds:

- Teamwork project snapshots
- PLN Project snapshots
- Library snapshots

For an overview of snapshot types and how to use them, see Project/Library Snapshot and Restore.

All types can be either automatically scheduled, or created manually at any time - for example, whenever the project reaches particular milestones.

Snapshot settings of the Projects root are inherited by all child folders and their Teamwork projects/libraries. (For any of these child items, you can define a different Snapshot schedule locally.)

Defining snapshot settings for a folder will not back up the contents of that folder. The only purpose of defining snapshot settings for a folder is to apply these snapshot settings to the Teamwork projects/libraries they contain.
Snapshot Schedule

Click **Edit** to choose a schedule for the snapshots of the selected item (Teamwork Project or Library):

- **Inherited**: use the Snapshot settings of the parent folder.
- **Defined locally**: override the default Snapshot settings
• **Don't Create:** This snapshot type will not be created
• **Hourly:** The snapshot will be created hourly, based on the below settings
• **Daily:** The snapshot will be created at a set time each day
• **Keep last:** Enter the number of snapshots to keep. (You must keep at least one copy.) With each additional automatic snapshot, the oldest stored snapshot will be deleted. Click **Save** to save changes.

_required permissions to modify schedule:
• Simplified management: **Project or Server administrator**
• Detailed management: **Modify details** for the selected item

**Snapshots List**

See the list of pending and existing Snapshots at the bottom of the Snapshots panel.
Select any of the listed Snapshots to access applicable commands:

Create (Manual snapshot)

Use the Create command to create a manual snapshot of the currently selected item (project or library).

- For a project: Choose the type of snapshot you want, and give it a name.
- For a library: Give the snapshot a name.

- A Teamwork project snapshot starts immediately as a background job, and you will receive a notification after it completes. (See Background Jobs.) The new snapshot is listed in the Snapshots list (as well as on the Activities panel).
- For a PLN Project snapshot: The process is the same as for an automatically scheduled PLN snapshot. All clients are informed (via an icon in the Teamwork Palette) that a snapshot is pending. The snapshot will be created when a client clicks Create snapshot during a Send and Receive.
If a snapshot of the chosen type is already in progress or pending, you cannot create another one until the first one is complete.

Keep Snapshot
Available only if the selected file is an automatic snapshot. Click **Keep** to retain this automatic snapshot even after it would otherwise be scheduled to be deleted.
After you click Keep, the automatic snapshot becomes a Manual Snapshot, with an editable Name, and will henceforth be listed as a Manual Snapshot.

Rollback
Available only if the selected item is a Teamwork project snapshot or Library snapshot (not a PLN snapshot)
See **Rollback Teamwork Project Snapshot or Library Snapshot on Same BIMcloud**.

Download Snapshot File
Click **Download**, then browse for the file destination.
See also:
* Download Snapshot File, then Import to any BIMcloud and
* Download PLN Project Snapshot, then Open as Solo Project and Re-Share.

Delete Snapshot
Click to delete the selected snapshot file. If the selected file is a pending PLN Snapshot, it is deleted from the list, and the snapshot will not take place.
File/Folder Versions Panel

The Versions Panel is available for a selected folder or any single uploaded file.

**For a Selected Folder:**

Use these controls to retrieve any earlier version of this folder, along with **all uploaded files** which the folder contains.

1. Select a selected folder from the Projects page Navigator (Project root, regular folder, BIMcloud Folder).
2. From the Versions panel: choose the date of the folder version you need.

3. Choose one of the three commands:
   - **Copy to:** A copy of the folder version (from the chosen date) will be added to the location you choose. You must choose a different location in the Navigator hierarchy.
     
     **Note:** The copied folder will contain only the last version of each uploaded file. Additional file versions (if any) are not copied.
   - **Rollback:** The folder version (from the chosen date) and the files it contains will overwrite the currently selected folder (including all the files it contains). Teamwork Projects and Libraries, if any, are not affected by folder rollback.
   - **Download:** The folder contents (from the chosen date) are downloaded in a zipped folder to your browser’s download folder.

**For a selected file:**

Use the Versions panel to view and manage file versions.

Each time you upload a new version of the file, all previous versions are kept and listed here by number.

**Note:** To save space, it is recommended to occasionally delete the obsolete file versions.
Choose one of the commands:

- **Copy to**: A copy of the selected file version will be added to the location you choose. You must choose a different location in the Navigator hierarchy.

- **Rollback**: The current file will be rolled back to the version you selected from the list, which is now added as the latest version. (No file versions are deleted as a result of Rollback).

- **Download**: A copy of the selected file version is downloaded to your browser’s download folder.
View Panel

Shows a preview of the selected picture file.
Available for uploaded picture-type files, of these formats: .bmp, .jpeg, .jpg, png, and .gif.
**BIMcloud Project**

BIMcloud Projects are created and listed on the Projects page of BIMcloud Manager. Essentially, a BIMcloud Project functions as a special kind of folder.

Use a BIMcloud Project to store (for example) Teamwork Projects, files of any format, and sub-folders in one place.

**Note:** A BIMcloud Project cannot contain other BIMcloud Projects within it.

Unlike regular folders, BIMcloud Projects can have unique Teams of users assigned to them and/or to their sub-items.

**Related Topics**
- Create BIMcloud Project
- BIMcloud Project Teams
- Permissions for BIMcloud Projects and Teams
Create BIMcloud Project

1. Go to the Projects page of BIMcloud Manager.
2. From the Projects root or any folder in the Projects tree: click Create BIMcloud Project.

Notes:
- If a folder is selected: The Create BIMcloud Project command is under the More... button.
- A BIMcloud Project cannot contain other BIMcloud Projects within it.

Convert Folder to BIMcloud Project

1. Select any folder on the Projects page.
2. From the More... pop-up: Click Convert to BIMcloud Project.
BIMcloud Project Teams

A Team is a group of Users associated to a BIMcloud Project. A Team often represents a discipline (e.g. “Structural Engineers”, “Architects”).

When you create Teams for a BIMcloud Project, you select Team Members from existing BIMcloud Users.

- Teams contain individual Users. You cannot add User Groups to a Team.
- A User can be a member of multiple Teams.

Unlike User Groups, a Team is used exclusively with a particular BIMcloud Project.

- Teams are not available for any other BIMcloud item - just for BIMcloud Projects and the items contained in them.
- Each Team is specific to its BIMcloud Project: you cannot re-use Teams for multiple BIMcloud Projects.
- However, you can add Teams with the same name to multiple BIMcloud Projects.

Create and Add a Team to a BIMcloud Project

1. From the Projects page of BIMcloud Manager, select a BIMcloud Project.
2. Go to the Teams panel, and click Create Team.
3. Enter a Team name (e.g., “MEP Engineers”), then click Create.
4. Click in the appearing Users field and start typing User names, or **Search** to bring up a searchable list of Users. Click to add the names you need.

5. Click **Save**.

**Related Topic**

**Create User**
Permissions for BIMcloud Projects and Teams

A BIMcloud Project Team often includes outside consultants with a wide range of different project duties. Use a Team setup that best matches your company’s needs:

- To mirror real-life project environments, where different design teams have different liabilities, Teams can be assigned specific permissions to access BIMcloud Projects.
- If no such differentiation of responsibilities is needed among the Teams, the manager can grant identical access to all members of all Teams of a BIMcloud Project by selecting the ‘All Team members’ option.

**Detailed Permissions Needed to Create a BIMcloud Project**

- “Create/Delete BIMcloud Project”
- “Modify Access”

**Detailed Permissions Needed to View or Modify/Delete Teams**

In some cases, Teams and their members are considered to be confidential information. Visibility of Team data can be controlled with a new permission called ‘View BIMcloud Project’. Users without this permission cannot see who else is working on the project.

- “View BIMcloud Project”
- “Create/Delete BIMcloud Project”

**Dedicated Team Folders**

In real-life design projects, different design teams have separate directories to store and share their files internally. Similarly, BIMcloud Projects can include dedicated folders for specific Teams, for exclusive data exchange. Each file inside these folders can be modified only by the Team which has permission to modify the folder.

As needed, fine-tune the permissions needed to view or modify these Team folders.
Project/Library Snapshot and Restore

Schedule a snapshot on the Snapshots panel, available for Project Root, Folders, Teamwork projects, BIMcloud Projects, and Libraries.

For a description of the controls, see Snapshots Panel.

Topics in this Section:

- PLN Project Snapshots
- Teamwork Project Snapshots and Library Snapshots
- Snapshot Files Location
- How do I Restore the Snapshot Files?

PLN Project Snapshots

PLN Project Snapshots contain your model data only, and can be used to reopen the Teamwork project in solo ARCHICAD mode. The PLN Snapshot process utilizes a client's computer and requires client confirmation before the snapshot can be created.

Note: PLN snapshots will only be run on the computers of those users whose role includes the following permission: “PLN Snapshot - Use computer for creating”.

When it is time for a scheduled PLN snapshot, all clients (whose role includes the permission entitled “PLN Snapshot - Use computer for creating”) will notice a “pending snapshot” icon in the Teamwork Palette accompanying the Send & Receive commands.

This means that - once the time comes for a scheduled PLN snapshot - if a user issues any of these Send & Receive commands, he/she will be informed that a PLN snapshot is pending, and that a full Send & Receive is necessary to carry this out.

The user has the option to either

- Continue with Send & Receive, followed by the PLN snapshot
- or skip the snapshot.

Although any number of online users may be alerted to and asked to perform a pending PLN snapshot, only one of them needs to click Continue to carry it out. (At this point, the “pending” icon disappears from the Teamwork Palette.) The rest of the users can work as usual. While the PLN snapshot is in progress, the confirming user cannot work in ARCHICAD.

If none of the users clicks Continue, and all of them choose to skip the Snapshot process, the PLN project snapshot cannot be created. The “pending snapshot” icon remains visible on the Teamwork Palette, until one user agrees to do a full Send & Receive followed by the snapshot.

Teamwork Project Snapshots and Library Snapshots

- Both types are created automatically in the background according to the schedule set in the Snapshot Schedule dialog box. No user interaction is needed to carry out the snapshot.
- Teamwork project snapshots contain model data, plus all BIMcloud related information, such as user data and roles.
- Library snapshots contain all the data of the library’s Library Parts. Reservation data is not included: even if a Library Part was reserved by a certain user at the time of the snapshot, it will be free for reservation after the Rollback.
Snapshot Files Location

By default for the BIMcloud:

- Project snapshot files of both kinds (Teamwork project snapshots and PLN snapshots) are saved to Projects > [ID number] > Backups, at the location where you installed the BIMcloud Server, with an .archive extension.

- Library snapshots are saved to Attachments > [ID number] > Backups, at the location where you installed the BIMcloud Server, also with the .archive extension.

In BIMcloud only: You can configure a different, external folder to store your snapshots:
See BIMcloud Server Configuration.

You can optionally redefine the snapshots folder:
See Redefine Snapshot Folder.

As long as the BIMcloud is running, you can download the saved snapshot files to any other location of your choice (see below). At download, the file’s extension becomes .BIMLibrary or .BIMProject.

How do I Restore the Snapshot Files?

With a TW project or Library-type snapshot: Either rollback to the current BIMcloud, or import it to a different BIMcloud. See these sections:
Rollback Teamwork Project Snapshot or Library Snapshot on Same BIMcloud
Download Snapshot File, then Import to any BIMcloud

With a PLN snapshot: Open it as a solo ARCHICAD projects, then re-share it.
See this section:
Download PLN Project Snapshot, then Open as Solo Project and Re-Share

Rollback Teamwork Project Snapshot or Library Snapshot on Same BIMcloud
1. From the Navigator of the Projects page in BIMcloud Manager: Select a project or library.
2. Open the Snapshots panel.
3. From the Snapshots list, select a Teamwork project snapshot or Library snapshot.
4. Click **Rollback**.

5. Choose a Rollback Option:

   - **Overwrite this Teamwork Project/Library**: The selected snapshot will overwrite and replace the current selected item.
     
     For a Teamwork Project Rollback: All users must re-join the new version of the project. (Users must discard any unsent changes, or save the version they currently have as a solo project, but they can no longer send any unsent modifications to a project that has been overwritten.)
   
   - **Create New Teamwork Project/Library from Snapshot**: The selected snapshot file will be created as a new, separate project or library on the server.

6. Click **Rollback**, then **OK**.

The project or library is now available in the BIMcloud Manager’s Project page.
Download Snapshot File, then Import to any BIMcloud

If you want to work with the Teamwork project or library on a different, functioning BIMcloud: download the snapshot file, then import this file to a different BIMcloud.

1. From the Navigator of the Projects page in BIMcloud Manager: Select a project or library.
2. Open the Snapshots panel.
3. From the Snapshots list, select a Teamwork project snapshot or Library snapshot.
4. Click Download.
5. Choose a folder to which to save the snapshot.
6. Import this snapshot to a folder on any functioning BIMcloud, using the Projects page of its BIMcloud Manager.

See Import Teamwork Project or Library.

Note: Since a Teamwork project snapshot contains all user data and roles, you can resume working right away - no need to re-add users or re-define roles.

Download PLN Project Snapshot, then Open as Solo Project and Re-Share

PLN snapshots can only be opened as solo ARCHICAD projects. You can use any version of ARCHICAD to open them. As soon as you gain access to a functioning BIMcloud, re-share this project and continue in Teamwork.

1. From the Navigator of the Projects page in BIMcloud Manager: Select a project.
2. Open the Snapshots panel.
3. From the Snapshots list, select a PLN snapshot.
4. Click Download.
5. Choose a folder to which to save the snapshot file.
6. Open this PLN file as a solo project, using any current or future version of ARCHICAD.
7. As soon a BIMcloud is running again, re-share the project and continue working in Teamwork.
Users Page

Use this page to manage BIMcloud users, and optionally organize them into user groups.

Required permissions to view users/groups:
- Simplified management: Project or Server administrator
- Detailed management: View item permission (Traversing applies)

Topics in this section:
- Users Navigator
- Functions on the Users Page
- Summary on the Users Page
- User Settings
- User Group Settings
Users Navigator

The Users Navigator list view displays the Users root, and the users and user groups that it contains.

There is no “tree view” option on the Users page, just a list. A group can contain other groups. (In such a hierarchy, the containing group is called a parent group.) In the user list, a selected user or group name is followed by the name of any parent group(s) in the line below.

Note: Circular membership references are not allowed. E.g. if Group A is a member of Group B, then Group B cannot be a member of Group A.

Filters

The user List displays all users and user groups by default. As needed, use the filter to limit the list:

If you have selected a user group, you can further filter the displayed user category within that group.
Expanded View

In the expanded view, the following columns allows you to sort the users by various data:

- Number of Joined projects
- Default role
- User’s Management role, if any (Server or Project Admin)
- LDAP directory service of this user (if this BIMcloud is connected to an LDAP. See BIMcloud Manager - LDAP Panel.)
- Last active: the last time this user interacted with the server
- License(s): the icon indicates the type of license used by this user:

<table>
<thead>
<tr>
<th>Icon</th>
<th>License Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Automatically reserved license</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Manually assigned license</td>
</tr>
<tr>
<td>![Icon]</td>
<td>not using a license</td>
</tr>
</tbody>
</table>

- User Color
Functions on the Users Page

Available functions for Users vary depending on what you have selected in the Navigator: Users Root, Users Group, or User.

<table>
<thead>
<tr>
<th>Function</th>
<th>Root</th>
<th>Group</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create User</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Group</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Duplicate</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Export</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Import</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Force Leave All</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Send Email (Multi-selection)</td>
<td></td>
<td>+</td>
<td>+</td>
</tr>
</tbody>
</table>

Each function is described in the following sections:
- Create User
- Create Group
- Enable/Disable User
- Duplicate User/Group
- Export Users
- Import Users
- Delete User(s)/Group(s)
- Force User(s) to Leave All Projects
- Send Email
Create User

Click the plus-sign pop-up and choose **Create User**. (If the Users root is selected, you can also choose the command from the Summary panel).

Enter the name of your user along with his/her new password.

Click **Next**.

In the new user’s Personal settings panel, enter the remaining parameters.

See **Project Settings Panel**.

**Required permissions:**

- Simplified management: **Server administrator**
- Detailed management: **Modify folder content** for User root
Create Group

Click the plus-sign pop-up and choose **Create Group**. (If the Users root is selected, you can also choose the command from the Summary panel.)

Enter the name of the group in the dialog and click **Create**.

The Group settings panel will open; you can start to add members to your new group.

See **Add Member to Group**.

*Required permissions:*

- Simplified management: **Server administrator**
- Detailed management: **Modify folder content** for User root
Enable/Disable User

Users are enabled by default. If you disable a user, this temporarily revokes his/her access to all projects and management resources.

A disabled user also gets a red badge on the navigator:

A disabled user can continue to work on his/her already joined projects offline and send in changes after he is enabled again.

🔗 Required permissions:

- Simplified management: Server administrator
- Detailed management: Enable/Disable User
Duplicate User/Group

Use this command to create a user with settings similar to those of an existing user/group.

Select the existing user, then click **Duplicate** from the Summary panel. Give the duplicate user a new name. Then adjust its settings in the Settings panel.

Required permissions:

- Simplified management: **Server administrator**
- Detailed management: **Modify folder content for User root**
Export Users

Use this function if you want to transfer users to a different BIMcloud, or to store user data for backup purposes. Select the user(s) you wish to export:

- To export all users, click on the Users root folder.
- To export all users from a particular user group, focus on the group and select all its users.
- To export a single or multiple users/groups, select them in the Navigator.

Click Export.

The data for all exported users will be placed into a single file and downloaded into your browser’s download folder, with extension .BIMUsers.
Import Users

Click the **Plus** button on the User root, or select the User root and click **Import** from the available functions. Browse for a file containing the users to import (with extension `.bimusers`).

The user file is imported to the BIMcloud Manager. If the BIMcloud Manager already contains a user with the same name as an imported user, you can decide how to handle duplicates.

A new group will be created with the date and time of the import, and all newly imported users and groups will be added as members. To see the import result, click the **Focus** button on the new group to view its contents.

🔗 Required permissions:
- Simplified management: **Server administrator**
- Detailed management: **Modify folder content** for User root
Delete User(s)/Group(s)

Select one or more users or user groups to delete. Confirm the Delete process in the upcoming dialog box.

You cannot delete users or groups that originate from an LDAP directory service.

\[\checkmark\] Required permissions:

- Simplified management: Server administrator
- Detailed management: Delete/Remove content for User root
Force User(s) to Leave All Projects

1. Select one or more users or user groups in the Navigator.

2. Click **Force leave all**.

This results in Force Leave for all selected user(s) from all their joined projects.

**Note:** To multi-select items in the Navigator, activate the checkboxes by clicking the checkmark at the top of the page.

See also **Force Leave User**.

- Required permissions to force leave a user from a project:
  - Simplified management: **Project or Server administrator**
  - Detailed management: **Modify access** for the project
Send Email

Use this function to send an email (e.g. to announce a scheduled server maintenance) to one or more selected Users.
Select one or more Users from User list, or select a User Group.
Click **Send Email** to compose a message.

Note: To use this feature, you need a configured SMTP server. To configure an SMTP folder, go to the Servers page, select the BIMcloud Manager, go to the Settings panel, and then Email preferences.

See **Email Preferences**.

* Required permissions to Send email:
  - Simplified management: **Server administrator**
  - Detailed management: **Modify details** for the User root
Summary on the Users Page

Summary information is shown for each selected item from the Navigator (Root, Group, or User):

<table>
<thead>
<tr>
<th>Description</th>
<th>User</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>License(s)</td>
<td>Indicates whether user has a BIMcloud User License.</td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>Number of members and groups within the selected group.</td>
<td></td>
</tr>
<tr>
<td>Directory service</td>
<td>Indicates whether the selected Group or User was imported through a Directory Service. (See BIMcloud Manager - LDAP Panel.)</td>
<td></td>
</tr>
<tr>
<td>Default role</td>
<td>User’s Default role, if assigned.</td>
<td></td>
</tr>
<tr>
<td>Management role</td>
<td>Server or Project Admin (if applicable), if Simplified Management is in use. (See Permission Management: Simplified and Detailed.)</td>
<td></td>
</tr>
<tr>
<td>Last active</td>
<td>The last time this user interacted with the server.</td>
<td></td>
</tr>
<tr>
<td>Joined Teamwork projects</td>
<td>List of Teamwork projects the user is currently joined into.</td>
<td></td>
</tr>
</tbody>
</table>
Joined Teamwork Projects

The Teamwork projects listed in this section are currently Joined by the selected user. The color of the dot indicates the user’s status for each project:

- **Online**: Blue
- **Offline**: Gray

Icons next to each user name indicate the type of client application on which the user is working (e.g. ARCHICAD or mobile BIMx application).
## Force Leave User

1. Select a user from the Navigator.
2. In the Joined Teamwork projects list, hover over a project name to display and click the **Force Leave** icon.

### Force Leave User from Single Project

**Force Leave from Multiple Selected Projects**

1. In the Joined projects list, click the checkmark above the list to enable checkboxes.
2. Check project(s) from which to Force Leave the user.
3. The "Force Leave selected" button is enabled: click to Force Leave the user.

See also **Force User(s) to Leave All Projects**.
**Force Leave User from Selected Projects**

**Note:** Force Leaving a user is immediate; the user will not be able to send in his/her changes. A Force Leaved user can re-join the project immediately without further restrictions. If you would like to prevent the user from re-joining the project, revoke his/her permissions on the project’s access panel.

**Required permissions to force leave a user from a project:**

- **Simplified management:** Project or Server administrator
- **Detailed management:** Modify access for the project
User Settings

The Settings panel for a selected User:

Click **Edit** to modify the fields in any of the sections of User Settings.

**Note:** You cannot edit certain parameters of users that originate from an LDAP directory service. These parameters are marked with an LDAP tag.

**Licenses Section**

Each user working on the BIMcloud requires one BIMcloud User License, regardless of how many projects the user is joined into. The license is automatically reserved for each user when he/she opens a Teamwork project in ARCHICAD.

A BIMcloud User License remains automatically reserved until the user closes ARCHICAD, or goes offline for any reason.

Alternatively, an administrator can manually assign a license to the user: click **Assign**. A manually assigned BIMcloud User License remains assigned to the user even after the user closes all projects on the BIMcloud or goes offline.
An Administrator can revoke this manually assigned license with the Revoke button. If available, an automatic license is then reserved for this user.

For general information, see BIMcloud User License.

The icon indicates the license type:

<table>
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</tr>
</thead>
<tbody>
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</tr>
<tr>
<td></td>
<td>not using a license</td>
</tr>
</tbody>
</table>

- **Required permissions:**
  - Simplified management: Server administrator
  - Detailed management: Manage licenses for the selected user

**Personal Settings Section**
- **Photo:** Click to browse for an image-format file to use as a user photo, with a maximum file size of 2MB.
• **Color:** Click the color picker to assign a user color.

• **Full Name:** Full name of the user. This name will appear in the header, and will be the name seen by other users in ARCHICAD. This field cannot be left empty.

• **Login Name:** Enter the login name of the User. Do not use spaces or special characters (e.g.,–/“…) This field cannot be left empty.

• **Email address:** Email address of the user. This field cannot be left empty.

• **Management role:** If the Simplified management mode is used, then you can assign the Management role for the user from this pop-up.

  See [Permission Management: Simplified and Detailed](#).

• **Default Role:** Choose a role from the pop-up. If you do not wish to assign a Default Role, then select "Not set" from the pop-up.

• If custom fields have been defined, they will also appear in the personal settings section. (Optional custom fields are defined by the Server Administrator on the Servers page, at BIMcloud Manager Settings.)

• Fields imported from LDAP servers are marked with an LDAP tag. Those parameters cannot be modified here.

---

### Required permissions:

• Users do not require permission to modify their own Photo, Color, Full name and Email address, and password (unless those are imported from an LDAP server)

• Simplified management: **Server administrator**

• Detailed management: **Modify details** for the user

---

### Parent Groups Section

Displays the parent group(s) to which the user belongs.

Click **Edit** to modify the user or group’s parent group(s).
**Add User or Group to Parent Group**

To add the currently selected item (user or group) as a member to another group, start typing the desired group name in the Add group field, and choose the group name when it appears.

You can only select groups for which you have Modify details permission.

**Delete Parent Group**

If a current parent group can be deleted for the currently selected item (user/group), that parent group is shown with an X button. Click the X to delete a parent group. (The selected item is no longer a member in that group.)

You can only delete groups for which you have Modify details permission.

**Note:** If the parent group membership stems from an LDAP database, this is indicated with a label. You cannot modify a user's parent group(s) if it comes from an LDAP database.

Required permissions to add or delete parent groups:

- Simplified management: **Server administrator**
- Detailed management:
  - **Modify details** for the currently selected user
  - **Modify details** for the selected parent group

**BIMcloud Projects and Teams Section**

Lists the BIMcloud Projects and associated Teams to which this user belongs.

See **BIMcloud Project Teams** for more information.
System Notifications Section

Notifications are informational or warning messages that automatically appear in the BIMcloud Manager. In this section, click **Edit** to set Notifications preferences for the selected User.

Display in BIMcloud Manager

A User will see only those System Notifications that are relevant, based on his/her User Role.

- **On**: All System Notifications (Info as well as Warning messages) will pop up as needed in the relevant locations of the BIMcloud Manager.
- **Off**: System Notifications will not pop up anywhere in the BIMcloud Manager interface.
- **Only Warnings**: Only Warning-type notifications will pop up.

See [System Notifications](#) for more information.
Receive in email

Choose Daily Summary to automatically receive an email every morning, listing all current Notifications.

**Note:** To use this feature, you need a configured SMTP server. (This is done on the Servers page, under the BIMcloud Manager's Settings panel, at Email preferences.)

See **Email Preferences**.

Password Section

For your own account: click **Change Password**.

For another user (if you are the Server Administrator): click **Request password change**.

The user will receive an email asking him/her to change the password, with a link to the password change page. The user then changes the password and returns to the BIMcloud Login page.

If the BIMcloud Manager is not able to send the email, then it will display a link where the password can be changed. Send this link to the user to have him/her reset the password.

**Required permissions to request password change from other user(s):**

- Simplified management: **Server administrator**
- Detailed management:
  - Modify details

This function is not available for users imported from an LDAP server.
Required permissions:

• Each user is able to change his/her own password
• Simplified management: Server administrator
• Detailed management: Modify details for the project
User Group Settings

A BIMcloud user can be member of any number of groups. A group can be a member of another group as well.

Click **Edit** to modify the fields in any of the sections of User Group Settings.

Members Section

This section lists the members (users and groups) of the current group. Click the filter to display all members, or just users or just groups which are members.
Click **Edit** to add or delete members to/from the selected group.

**Add Member to Group**

Start typing the desired member or group name in the Add member field, and choose the name when it appears.

1. Select the group you want to add members to.
2. Click **Edit**.
3. Start typing the desired member or group name in the Add member field, and choose the name when it appears.

**Delete Member from Group**

1. In the Members part of User Group Settings: Click **Edit**.
2. Hover over the name of a user to delete, then click the X.

**Delete Multiple Members from Group**

1. In the Members part of User Group Settings: Click **Edit**.
2. Click the checkmark to display a checkbox next to every user.
3. Check the boxes of each user to be deleted (or use Select all), then click **Remove**.

- **Required permissions to add or delete parent groups:**
  - Simplified management: **Server administrator**
  - Detailed management:
    - **Modify details** for the currently selected user
Roles Page

Roles are a set of permissions, which describe what the owner of the role can do for specific element types or data types, both on the BIMcloud Manager or in ARCHICAD Teamwork projects. Thus, you can set up generic Roles and use them for any content type.

Use the Roles page to view and modify roles and their permissions. A Settings Panel is available for each selected Role. Use these controls to define permissions for a Role.

See Role Settings for details.

Use the Access panel of the BIMcloud items to grant a permission set (Role) to someone (User or Group) for a certain item (the one currently selected in the Navigator.)

---

P Required permissions to view roles:

- Simplified management: Project or Server administrator
- Detailed management: View item permission (Traversing applies)

Topics in this section:

Roles Navigator
Functions on the Roles Page
Role Settings
Panels
Roles Navigator

The Navigator displays the Role root plus the Roles. The roles are shown in list view only. There are no additional columns in expanded view.

<table>
<thead>
<tr>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architect</td>
</tr>
<tr>
<td>Draftsman</td>
</tr>
<tr>
<td>Editor</td>
</tr>
<tr>
<td>Full access</td>
</tr>
<tr>
<td>Lead Architect</td>
</tr>
<tr>
<td>Manager</td>
</tr>
<tr>
<td>Viewer</td>
</tr>
</tbody>
</table>

Related Topics:

Search Navigator Items
Functions on the Roles Page

Available functions for the Roles Page vary depending on what you have selected in the Navigator: Root or Role.

Each function is described below.

<table>
<thead>
<tr>
<th>Function</th>
<th>Root</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Role</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Duplicate</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Export</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Import</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td>+</td>
</tr>
</tbody>
</table>

Topics in this section:
- Create Role
- Duplicate Role
- Export Roles
- Import Roles
- Delete Roles
Create Role

Click Create Role from the plus sign next to the Roles root, or from the Root Summary. Enter a role Name.

Define its permissions by editing the checkboxes in the Settings panel.

- **Required permissions:**
  - Simplified management: Server administrator
  - Detailed management: Modify folder content for Role root

Duplicate Role

Use this if you want to create a user with settings similar to those of an existing role.

Select the existing role, then click Duplicate from the Summary panel. Give the duplicate role a new name. Then adjust its settings in the Settings panel.

- **Required permissions:**
  - Simplified management: Server administrator
  - Detailed management: Modify folder content for Role root

Export Roles

Use this function to transfer roles to a different BIMcloud, or to store user data for backup purposes. Select the role(s) you wish to export:

- To export all roles, click on the Roles root folder.
- To export a single or multiple users/groups, select them in the Navigator.

**Note:** To multi-select items in the Navigator, activate the checkboxes by clicking the checkmark at the top of the page.
• Click Export.

Data for all the roles you are exporting will be placed into a single file and downloaded into your browser’s default download folder, with extension .BIMRoles.

Import Roles

Click the Plus button on the Role root, or select the Role root and click Import from the available functions. Browse for a file containing the roles to import (with extension .BIMRoles).

The role file is imported to the BIMcloud Manager.

If the BIMcloud Manager already contains a role with the same name as an imported role, the imported role is renamed with a suffix (the existing role will not be overwritten).

Required permissions:
• Simplified management: Server administrator
• Detailed management: Modify folder content for Role root
Delete Roles

1. Select one or more roles to delete.
   
   **Note:** To multi-select items in the Navigator, activate the checkboxes by clicking the checkmark at the top of the page.

2. Click Delete.

   Confirm the Delete process in the upcoming dialog box.

   🌐 Required permissions:
   - Simplified management: **Server administrator**
   - Detailed management: **Delete/Remove content** for Roles root
Panels

Role Settings
A Settings Panel is available for each selected Role. Use these controls to define permissions for a Role.

Required permission:
• Simplified management: Server administrator
• Detailed management: Modify details

Permissions
Role Permissions are divided into seven categories: Management Permissions, and six groups of ARCHICAD Related Permissions. Click the category headers to expand/minimize the lists in each.
See Management Related Permissions and ARCHICAD Related Permissions for details.

Note: Management permissions are not available while using Simplified Management.
See Permission Management: Simplified and Detailed.

Edit Permissions for a Role
Click the Edit button to edit permissions for the currently selected role (e.g. Draftsman).
• Check/uncheck a box to add or remove permission from the role.
• Check/uncheck a category name to add/remove all permissions of that category at once.
- Required permissions:
  - Simplified management: **Server administrator**
  - Detailed management: **Modify details**

For each permissions category, the checkboxes indicates the status of the included elements:

- **Empty**: no permissions are selected from that category
- **Gray** checkmark: some permissions are selected from that category
- **Black** checkmark: all permissions are selected from that category
My Tags

**Note:** Not available for Master Administrator.

Use tags in BIMcloud Manager to categorize and locate any items (projects, folders, files) on the Projects page of BIMcloud.

For example, tag the two projects that you work on daily, then use search and filter to quickly display these projects in the navigator.

Tags are for personal use: no one else who accesses the BIMcloud will see the tags you are using.

Tags are listed and managed on the My Tags page of BIMcloud Manager.

- Required permissions to use Tags and to display My Tags page:
  - Detailed management: **Enable tags**

**Related Topics**

- My Tags Page
- Add Tag to Item
- Find Items by Tag
- Remove Tag from Item
- Edit/Delete Tag
My Tags Page

Use this page in BIMcloud Manager to manage your tags.
- Tags are listed in the Navigator in a flat list.
- For any selected Tag, relevant commands are available (described in the following sections).

Default Tag Set

The first time you open the My Tags page, you get the option to add five predefined Tags.

These are available for your convenience, but you do not have to add them or use them. You can create any number of tags in addition to the default set.
If your tag list is empty, you can create the Default tag set at any time using the command:
Add Tag to Item

Taggable items are all those listed on the BIMcloud Projects page: Teamwork Projects, BIMcloud Projects, Libraries, folders, and uploaded files.
You can assign any number of tags to an item.

1. Open the Projects page of BIMcloud Manager.
2. Select one or more items.
3. At “My Tags”, click the Plus sign:
4. The **Add/Create Tag** dialog appears. Do one of the following:
   - Start typing the name of an existing tag (e.g. “My Projects”) until the desired tag appears in the list below. Click to assign.
   - Click **New tag** to create a new one. (*See also Create or Duplicate a Tag.*)
The tag (e.g. “My Projects”) is now assigned to the selected item(s).
Tagged items get a tag icon in the Projects Navigator, and the tags are shown in the summary section:

Repeat to add any number of tags to the selected item(s).

**Related Topics:**
- Remove Tag from Item
- Find Items by Tag
Find Items by Tag

Do one of the following:

**Search for Tag (Projects Page)**

**Filter Items by Tag (Projects Page)**

**Filter Items by Tag (My Tags)**

**Search for Tag (Projects Page)**

1. Open the Projects page of BIMcloud Manager.
2. Click the Search icon to open the search field and display the tags.

3. Click on a tag, or start typing the tag name (e.g. “To do”) to display it.

4. Click the tag you want. Add as many tags as needed to further filter the criteria.
5. The list is filtered to show all items with that tag.
**Add Search Term**
To add a search term (text and/or tag), type it in and click the Plus sign.

**Search by Text**
To search by just text (instead of tag), type in the text and press Enter.

Click x in the Search field to cancel the search and display all elements again.

**Filter Items by Tag (Projects Page)**
1. Open the Projects page of BIMcloud Manager.
2. Select an item.
3. In the summary section, click the tag you want to filter for, to open its drop-down menu.
4. Click **Filter Projects**.
5. The list is filtered to show all items with that tag.

Filter Items by Tag (My Tags)

1. Open the My Tags page of BIMcloud Manager.
2. Select the tag you want to filter for (e.g. “My Projects”).
3. From the summary section, click the “Tag used” line.
4. The Projects page opens: the list is now filtered to show all projects that use the tag.
Create or Duplicate a Tag

1. Open the My Tags page of BIMcloud Manager.
2. Do one of the following:
   – Click the plus sign from the My Tags root item
   – Click the Create Tag command
   – Select an existing tag, then choose Duplicate.
3. In the appearing dialog, enter the name of the new (or duplicate) tag. Each tag name must be unique.
4. Click one of the ten color buttons to use it for the new tag. You can re-use colors for any number of tags.

Note: You can also create a new Tag on the Projects page. See Add Tag to Item.

Related Topics:
- Edit/Delete Tag
- Remove Tag from Item
- Add Tag to Item
Remove Tag from Item

1. Open the Projects page of BIMcloud Manager.
2. Select the item from the Navigator.
3. From the summary section, click the tag you want to remove.
4. Click Remove Tag.

Related Topics:

Edit/Delete Tag
Edit/Delete Tag

1. Open the My Tags page of BIMcloud Manager.
2. Select a tag to edit.

To edit Tag name or color:
   - In Settings, click Edit.
   - Modify the name and/or color, then click Save.

To delete a Tag:
Click Delete from the summary section.
This eliminates the tag entirely. The tag will be removed from all items that used it.

Related Topics:
- Find Items by Tag
- Remove Tag from Item
Servers Page

Servers are the hardware components of a BIMcloud: the BIMcloud Manager, and any number of BIMcloud Servers. These servers act together as a single BIMcloud.

Use the Servers page of BIMcloud Manager to view and modify servers and folders.

ười: Required permissions to view servers and folders:
- Simplified management: Server administrator
- Detailed management: View item permission (Traversing applies)

Topics in this section:
Servers Navigator
Functions on the Servers Page
Summary on the Servers Page
Panels
BIMcloud Server/BIMcloud Manager - Backups Panel
Servers Navigator

The Servers page lists the servers, organized into folders, to which you have access. It contains two server types:

- BIMcloud Manager (only one instance is possible)
- BIMcloud Server. Multiple BIMcloud Servers may be present.

You can use folders to organize these servers in any way you like, e.g. all servers located in the same office go into one folder.

Related Topics:
Display Navigator Items (Tree vs. Flat)
Select/Multi-select Navigator Items
Search Navigator Items
Focus on Folder

Expanded View

In expanded view, the following columns are available:

- Version
- Status
- Free space
- Last activity
- Last backup
- Active users

Use these columns to quickly sort among your servers. Switch to flat list view to sort globally (otherwise it sorts within folders only).
Functions on the Servers Page

Functions Available for Servers Folder

Available functions vary depending on what you have selected in the Navigator: the Servers Root, Folder, BIMcloud Manager, or a BIMcloud Server.

<table>
<thead>
<tr>
<th></th>
<th>Root</th>
<th>Folder</th>
<th>BIMcloud Manager</th>
<th>BIMcloud Server</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Folder</td>
<td>+</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pair</td>
<td>+</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Move to folder</td>
<td></td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Disconnect</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each function is described below.
Create Server Folder

Creates a folder inside the currently selected folder. This function is available for the Server Root folder and any of the server folders.

Click **Create Folder** and enter the new folder name in the appearing dialog. Make sure the new folder name is unique within this folder.

The new folder will be automatically selected after creation.

- Required permissions:
  - Simplified management: **Server Administrator**
  - Detailed management:
    - Modify folder content
    - Modify details
Pair BIMcloud Server

Pairs the BIMcloud Manager with a newly installed BIMcloud Server.

**Note:** If you install a new BIMcloud Manager, and you then install a new BIMcloud Server immediately afterwards (as described at [Clean Installation](#)), the pairing process occurs automatically.

Use this function to ensure that the newly installed BIMcloud Server can communicate with the BIMcloud Manager. This involves copy-pasting the BIMcloud Manager’s public key (token) into the BIMcloud Server’s Configuration screen.

This function is available in the Server Root folder and any of the server folders.

1. Open the BIMcloud Manager web interface in a browser window.
2. Select the folder (Servers root or another server folder) where you wish to place the BIMcloud Server that is being paired.
3. Click the **Pair** command.
4. In the appearing dialog, click Select Token.

5. The text has been selected. Now copy this selected text to the Clipboard (e.g. using Ctrl + C).

6. Click Next.

7. Enter the URL of the BIMcloud Server (including the http:// or https:// prefix and the port number e.g.: http://computer.com:1228).
   Or select the name of a local server from the list.

8. Click Next. (If the URL is not working, fix the error.)

9. Add a name to your server. This name will be displayed in the Navigator and used in ARCHICAD when referring to it as a host server.

10. Paste the copied text to the BIMcloud Server’s configurator screen.
    
    **Note**: If the configuration is not currently in progress, you can access this screen here: go to the Tray application or the BIMcloud application folder, then use **Configure BIMcloud Server**.
11. The BIMcloud Server configuration interface appears. Click Next.
12. Use the Paste command (e.g. Ctrl + V) to paste the previously copied token into the Public Key input field, then restart the server.
14. Click Next.
15. On the final screen, click Finish.
   - The BIMcloud Server will automatically appear in the Navigator of the BIMcloud Manager.

Troubleshooting:
- Make sure the BIMcloud Server was successfully restarted
- Make sure you Copy/Pasted the correct public keys
- Make sure the BIMcloud Server’s URL you’ve entered is accessible from the BIMcloud Manager computer

Required permissions:
- Simple management: Server Administrator
- Detailed management:
  - Modify folder content
  - Modify details
Server Status (Running/Stop/Restart)

Shows the current running status of the selected Server. This control allows you to stop and restart the server. The function is available for any of the BIMcloud Servers.

![Server Status Screen](image)

The start and stop process might take some time, because first the Server will make sure all open connections are closed. The process will start when you click the function; you will be notified when the process is complete.

See [Background Jobs](#).

Required permissions:

- Simplified management: Server Administrator
- Detailed management: Start/Stop server
Move to Server Folder

Moves the selected item(s) to a new folder. This will also move the child item(s) of the selected folder. Click the function and pick a folder where to move the elements.

**Note:** The folder picker will contain all the folders you can see in the Navigator, but to select a folder as a destination, you must have permission to modify its content.

- Required permissions:
  - Simplified management: Server Administrator
  - Detailed management:
    - Delete/Remove folder content for the parent of the selected item
    - Modify folder content for the target folder
    - Modify details for the target folder
Disconnect BIMcloud Server

Disconnects the selected BIMcloud Server.

Click the function, confirm your decision. The BIMcloud Server will be disconnected. If you decide to reconnect it later, repeat the Pairing process.

See Pair BIMcloud Server.

Important: You must remove all hosted projects and libraries from the BIMcloud Server prior to disconnecting it.

Required permissions:

- Simplified management: Server Administrator
- Detailed management: Delete/Remove folder content for the parent folder
Delete Server Folder

Deletes the selected folder. Click the command and confirm your decision.

Important: On the Servers page, only empty folders can be deleted.

Required permissions:

- Simplified management: Server Administrator
- Detailed management: Delete/Remove folder content for the parent folder
Summary on the Servers Page

The summary section lists the most relevant information about the Server selected in the Navigator.

The available information varies depending on what is selected: The Servers root folder; other server folder; the BIMcloud Manager; and/or a BIMcloud Server.

<table>
<thead>
<tr>
<th>Description</th>
<th>Root</th>
<th>Folder</th>
<th>BIMcloud Manager</th>
<th>BIMcloud Server</th>
<th>Version</th>
<th>Active Teamwork projects</th>
<th>CPU Usage</th>
<th>RAM Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server's program version</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>24.0.1603.1455.60</td>
<td>0/5</td>
<td>0%</td>
<td>7.7/15.9 GB</td>
</tr>
<tr>
<td>Server's status (running or stopped)</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Running</td>
<td>0/2</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Number of servers</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
<td>0/5</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Number of Teamwork projects on this server</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
<td>0/5</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Number of Libraries on this server</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
<td>0/5</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Root</td>
<td>Folder</td>
<td>BIMcloud Manager</td>
<td>BIMcloud Server</td>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------</td>
<td>--------</td>
<td>------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free TW project space</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>Free space in the default project location of this server</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free library space</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td>Free space in the default library location of this server</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free data space</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td>Free space in the default backup location of this server</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free snapshot space</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td>Free space in the default snapshot location of this server</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last backup</td>
<td></td>
<td></td>
<td>+</td>
<td>+</td>
<td>Date and time of last completed backup</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Backup schedule</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Info on next scheduled backup, if any</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active TW projects</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Number of active projects, out of the total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active users</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>Number of users (out of total joined) currently online on this server (each user is only counted once)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CPU usage</td>
<td></td>
<td></td>
<td></td>
<td>+</td>
<td>Current demand (percentage)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RAM usage</td>
<td></td>
<td></td>
<td>+</td>
<td>+</td>
<td>Physical memory (GB) in use</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Panels

The available Panels on the Servers page and their content vary depending on what is selected in the Navigator: the Root, a folder, a BIMcloud Server, or the BIMcloud Manager (which itself is a server).

The Servers Root with Folders, the BIMcloud Manager, and BIMcloud Servers

Server Root
The Server root acts as a folder and has no special settings.

Server Folder - Settings Panel
On the Settings panel, edit the folder name.

📍 Required permissions:
- Simplified management: Server Administrator
- Detailed management: Modify details
Server Folder - Hosted Projects
This panel displays all the projects hosted on all the BIMcloud Servers contained in this folder. See Hosted Teamwork Projects/Libraries for available functions.

Server Folder - Hosted Libraries
This panel displays all the libraries hosted on all the BIMcloud Servers contained in this folder. See Hosted Teamwork Projects/Libraries for available functions.

See the following sections for details on the panels available for selected Servers:
BIMcloud Manager - Settings Panel
BIMcloud Server - Settings Panel
BIMcloud Manager - Settings Panel

The BIMcloud Manager item on the Servers page is itself a server. This section describes its Settings panel.

Status Section

This section contains information on
- **Version**: program version of the BIMcloud Manager
- **Host computer**: The name of the computer on which the Manager is installed
- **Installation folder** path of the BIMcloud Manager
- **Warnings** (if any) related to the BIMcloud Manager
- **Notification of** [Available Updates] (if any).  
  - To enable check for updates, turn on this option in the General Settings section (below)
General Settings Section
Click Edit to modify data in this section.

**Required permissions:**
- Simplified management: Server Administrator
- Detailed management: Modify details

- **BIMcloud Name:** You will see this name in the top-left corner of the web interface. ARCHICAD users will see this name in the BIMcloud Server pop-ups and in the Tray Icon application.

- **Management roles** *(See Permission Management: Simplified and Detailed):*
  - Simplified
  - Detailed

- **Company logo:** Optionally, load a company logo to your BIMcloud’s login page. Click Choose File to browse for the desired image file.

- **Public Key:** The BIMcloud Manager’s public key. The public key cannot be modified.

- **Check for update(s):** Turn this feature on to enable BIMcloud to communicate with GRAPHISOFT servers to check for
  - available Update(s),
  - status of BIMcloud (running or stopped),
  - available License Update(s)

**Required permissions:**
- Simplified management: Server Administrator
- Detailed management: Manage Licenses on BIMcloud Manager
Connection Settings

Configure the addresses ARCHICAD can use to connect to the Server.

- **Primary address** (required): This address uniquely identifies the server. The BIMcloud Manager uses this address to access the server.

- **Alternative addresses and lookup order** (optional): ARCHICAD will select the most suitable one to connect

See [Connection Settings](#) to learn more about how to set up connections.

BIMcloud Manager automatically tests the addresses while entering them and provides feedback about the result.

You can also enter a non-working address, because it might work from a different location.

Changes cannot be saved if one of the entered addresses points to a different BIMcloud.

If you want to add the server computer's current IP address or computer name to the list, click **Show current addresses** and pick one of the addresses.

Adjust the lookup order of the addresses using the up/down arrows. Use the delete icon to remove an address or the refresh icon to test it again.

**Required permissions:**
- Simplified management: Server Administrator
- Detailed management: Modify details

Email Preferences

Configure the email server which will allow you to send notifications and password reminders.

- **SMTP server**: address of your SMTP server
- SMTP server port
- **Connection Security**: Select the security level your server requires
- **From address**: Emails will be sent using this email address
- **Server requires authentication**: Check if a username and password are necessary to access the server
- **User**: Authenticate as this user
• **Password:** Use this password for the above user
  
  Required permissions:
  - Simplified management: **Server Administrator**
  - Detailed management: **Modify details**

**Custom User Fields Section**

Fields entered here will be available on all users’ settings to enter additional, server-wide information. (E.g. Skype address, Office where the user is located.)

- Add new: Click this button to add a new field and enter its name
- Remove: Removes the field from here and from all users’ settings panels. Data entered into this field by users will be lost.

  Required permissions:
  - Simplified management: **Server Administrator**
  - Detailed management: **Modify details**
**BIMcloud Manager - LDAP Panel**

The BIMcloud Manager is able to connect to one or more Directory Services and import users/groups from that server - all of them, or just a selection.

To keep the user/group information up to date, it is possible to set up regular and automatic synchronization with the Directory Services.

The LDAP Panel contains a list of the currently connected Directory Services. Use this panel to add/remove Directory Services, or to modify the settings and imported data for already existing ones.

---

**Connect to New Service**

Click *Connect to new service* to bring up the **Connection Panel**.

Steps to set up a connection:

1. Create connection.
2. Set up the parameter mapping.
3. Filter the users and groups to be imported.
4. Modify the synchronization schedule.

[Required permissions:](#)

- Simplified management: **Server administrator**
- Detailed management: **Modify details**

Each step is detailed below.
Step 1: Create Connection

This step will establish the connection to the directory service. Enter the following parameters (all parameters are required unless marked as optional):

- **Name**: Enter a name for this directory service for easier identification. You will see this name in the list of the directory services, and users/groups will reference the directory service by this name.
- **Server address**: The address of the directory service
- **Use SSL Connection.**
- **Port**: Port of the directory service.
- **User (optional)**: Authenticate with this user during connection. No authentication is used when left empty.
- **Password (optional)**: Use this password for authentication.
- **Base DN (optional)**: An LDAP search criterion used to narrow down the imported users/groups.

After you have entered the parameters, push the **Test connection** button. If you get any error message, correct the parameters and/or make sure the server address is accessible from the BIMcloud Manager computer.

Step 2: Set Up Parameter Mapping
The directory service will contain a large number of objects and parameters, so it is important to narrow down the imported elements. Because of the various setup options, even those directory services can be configured in different ways which use the same service engine.

We provide two built-in configuration schemes, which will work with the default settings, but it is likely that you will have to fine-tune their mapping parameters:

- Active Directory
- Open LDAP

Use the Directory type pop-up to enter the basic values of the selected service type (either Active Directory or Open LDAP).

Click the Preview button to see the result of the mapping and import. If you do not see the expected entries, then you must fine-tune the queries and mapping options.

Queries: the LDAP objects passing these queries will be handled as users and groups:

- **User query**: All items which will pass through this LDAP query will be handled as users
- **Group query**: All items which will pass through this LDAP query will be handled as groups. Enter the names of the LDAP parameters to map them to the BIMcloud’s user parameters. All parameters are required unless marked as optional.

Mapping: select the parameters of the objects passing the queries and map them to BIMcloud user parameters:

- **Group ID**: unique ID for groups
- **Group name**: Name of group
- **Members**: comma-separated list of group members
- **User ID**: unique ID for users
- **Login name**: login name for the user
- **Parents**: comma-separated list of parents
• Full name: you can combine two LDAP parameters into a single user name (the second field is optional)
• Email address: email address of user
• Prefix for user/group names (optional): Prefix the name of all imported users and groups to avoid duplicate names

Click the Preview button to open a list and see the result of the Parameter mapping. If there is an error in the mapping process and some of the required fields remain empty, then those entries can’t be imported to the BIMcloud Manager. The rest of the items will be automatically imported during the first Synchronization.

Click Save to finalize the Directory Service connection settings.

**Step 3: Filter Users and Groups to be Imported**

If you do not wish to import all the users and groups who pass through the connection filter, then you can fine-tune the import process and select them individually or based on groups.

In the Filter users section, click Edit, and switch the Filter to “Import selected users and groups.”

Click the Select users and groups button and mark the users and groups you wish to import.

Note: Only those users are listed here for which the parameter mapping created a valid result.

Click OK to close the selection dialog.

If you wish to automatically import all members of the selected groups (rather than selecting them one by one), activate the “Automatically include group members” checkbox.

Click Save to store your changes.

**Step 4: Synchronization**

**Manual Synchronization**
Click the **Sync** button in the Filter users section to synchronize the directory service for the first time.
The synchronization process will start in the background. You can review the process status on the Server Messages dropdown at the top-left of the page.
You will be notified once the process is complete.

**Set Up Regular Synchronization**

It is a good practice to set up regular synchronization for the directory service to make sure all settings are always up to date: new users added and obsolete users removed from the BIMcloud.

In the Filter users section, activate the checkbox “Regularly sync with Directory service”, then enter the interval in minutes. Click **Save** to store your changes.

**Review Synchronization Results**

The result of the automatic synchronization is logged. To review this log, select the directory service from the list and click the **Details** button. You will find the Sync history in the bottom section of the panel.

**Modify a Directory Service Connection**

If something changes in the connection settings or you modify the filtering, select the directory service from the list and click the **Details** button.

Edit the required section and click **Save** again.

If the number of the imported users changes and some of them are removed because of the modifications, a confirmation dialog will pop up about how to handle removed users. You can decide between two options:

- **Remove them from BIMcloud**: Removed users will be forced to leave their existing projects and all their unsent changes will be lost. (They can still save a Solo PLN from their local data folder on their local computer.)
  
  See [Force Leave User](#).

- **Keep them as BIMcloud users**: Removed users will be kept on the user list.

**Disconnect from a Directory Service**
Select the Directory service from the list and click **Disconnect**. The above described confirmation dialog will appear again.

**Troubleshoot Connection**

If there is an error in the synchronization, the process stops automatically and logs the error event into the sync history. The sync history also lists the errors that must be fixed in order to sync again. Users with View Item permission for the BIMcloud Manager will receive a warning about the synchronization error when they Log in to BIMcloud Manager.

.Required permissions for all Directory Service functions:

- Simplified management: **Server Administrator**
- Detailed management: **Modify details for BIMcloud manager**
BIMcloud Manager - Licenses Panel

The Licenses panel gives an overview about the currently used, available and missing BIMcloud User Licenses.

Each user working on the BIMcloud requires one BIMcloud User License, regardless of how many projects the user is working on. A license is automatically assigned to the user when he/she joins a Teamwork project in ARCHICAD.

The BIMcloud User License remains automatically reserved until the user closes ARCHICAD, or goes offline for any reason.

Once he/she opens the project again, a license is again automatically reserved for use. If there are no more available BIMcloud User Licenses, then the user can only work offline. See BIMcloud User License for more information.

If a License update is available, a Notification appears.

Note: To receive this Notification, you must turn on Check for Updates. Do this on the Servers page of BIMcloud Manager (Settings Panel/General Settings).

The list on the Licenses panel shows how these Licenses are currently used. Select the list row of the user to manage his/her licenses. The following functions are available:

Assign license(s)

Assigns a license to the user manually. This remains permanently assigned to the user even after he/she closes all projects on the BIMcloud or goes offline.

- Required permissions:
  - Simplified management: Server Administrator
  - Detailed management: Manage licenses

Revoke license(s)

An Administrator can revoke a manually assigned license.

Select the list row of the user and click the Revoke button. If available, an automatic license is then assigned.
Required permissions:
- Simplified management: Server Administrator
- Detailed management: Manage licenses

View License Details
Click the Details button to view additional license details, including:
- License Container: Source of the licenses (e.g. name of license server)
- Number of licenses available/in current use
- Type of license (e.g. FULL, EDU)
- Expiry date

For details, see BIMcloud Server/BIMcloud Manager - Backups Panel.
**BIMcloud Server - Settings Panel**

This panel shows the settings of the selected BIMcloud Server.

**Status Section**

Status: Indicates the current status of the BIMcloud Server:
- Running (Everything is OK)
- Stopped (The server is accessible, but the service is not running)
- Not Accessible (The server is not accessible)

- **Version**: Program version of the BIMcloud Server
- **Host computer**: The name of the computer on which the Server is installed
- **Installation folder**: path of the BIMcloud Server
- **Warnings** (if any) related to the BIMcloud Server

Required permissions to start/stop server:
- Simplified management: **Server Administrator**
- Detailed management: **Start/Stop server**

**General Settings Section**

Name: of the BIMcloud Server.

Required permissions:
- Simplified management: **Server Administrator**
- Detailed management: **Modify details**
Connection settings

Configure the addresses ARCHICAD can use to connect to the Server.

- **Primary address** (required): This address uniquely identifies the server.
- **Alternative addresses and lookup order** (optional): ARCHICAD will select the most suitable one to connect to.

See [Connection Settings](#) to learn more about how to set up connections.

BIMcloud Manager automatically tests the addresses while entering them and provides feedback about the result.

You can also enter a non-working address, because it might work from a different location.

Changes cannot be saved if one of the entered addresses points to a different BIMcloud.

In case you wish to add the server computer’s current IP address or computer name to the list, click **Show current addresses** and pick one of the addresses.

Adjust the lookup order of the addresses using the up/down arrows. Use the delete icon to remove an address or the refresh icon to test it again.

**Required permissions:**
- Simplified management: **Server Administrator**
- Detailed management: **Modify details**

Hosted Projects

[Image of Hosted Projects]
This panel displays all the projects hosted on the currently selected BIMcloud Server. See *Hosted Teamwork Projects/Libraries* for available functions.

**Hosted Libraries**

This panel displays all the libraries hosted on the currently selected BIMcloud Server.

![Hosted Libraries Panel](Image)

See *Hosted Teamwork Projects/Libraries* for available functions.

**Backups**

Use this panel to schedule and manage BIMcloud Server backups.

*Required permissions:*

- Simplified management: **Server Administrator**
- Detailed management: **Modify details**

For details, see *BIMcloud Server/BIMcloud Manager - Backups Panel*. 
BIMcloud Server/BIMcloud Manager - Backups Panel

Use this panel to schedule, create and manage backups of the BIMcloud Server or BIMcloud Manager.

- Required permissions:
  - Simplified management: Server Administrator
  - Detailed management: Modify details

What is in the Backup?
For the BIMcloud Server: Backups include all Teamwork data: Projects, Libraries, and their snapshots; Activity Log, mail and Server configuration information.
For the BIMcloud Manager: Backups include all the above data, and also includes Folders, Users and Roles.

- Note: Server monitoring data (e.g. CPU, memory usage) are not included in the backup.

Only one copy of each Backup type (BIMcloud Manager and BIMcloud Server) is retained at a time. If a Backup process is unsuccessful, the last saved Backup version is retained until a new Backup is created to replace it.

Enable BIMcloud Backups At Server Configuration
The Backup function for BIMcloud Server and/or BIMcloud Manager is enabled only if:

- you check the Create Server Backup box during the Configuration process, and
- you define a path for Server Backup Content during the Configuration process.

See BIMcloud Manager Configuration and BIMcloud Server Configuration.

Schedule Backup
On the Backups Panel:
Click **Edit** to choose a schedule for server backups (of either BIMcloud Server or BIMcloud Manager):

- **Don’t Create**: No backup will be created
- **Hourly**: The backup will be created every certain number of hours, based on the settings you provide
- **Daily**: The backup will be created at a set time every certain number of days, based on the settings you provide.

Click **Save** to save changes.
Backup Status

This section provides information about the status of the last backup. If errors occurred during the last backup, then those errors will be noted.

Create Manual Backup

On the Backups panel, click Create to backup the server at any time, regardless of any scheduled backup.

<table>
<thead>
<tr>
<th>BIMcloud Manager Backups</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Backup Status:</strong></td>
</tr>
<tr>
<td><strong>Started at:</strong></td>
</tr>
<tr>
<td><strong>Finished:</strong></td>
</tr>
<tr>
<td><strong>Size:</strong></td>
</tr>
<tr>
<td><strong>Path:</strong></td>
</tr>
<tr>
<td><strong>Version:</strong></td>
</tr>
</tbody>
</table>

To restore a backup, run the BIMcloud Manager Restore Tool from the BIMcloud Tray Application menu on a computer with a clean BIMcloud installation. Click Browse in the BIMcloud Manager Restore Tool and select your backup file, then click Restore.

For further help with Restore, please go to GRAPHISOFT Support page.

plers Required permissions to modify the backup schedule or work with existing backups:

- Simplified management: Project or Server administrator
- Detailed management: Modify details for the selected item

Related Topics:

- How to Restore a Backup for BIMcloud Server or Manager
- Where are the Server Backup Files Located?
How to Restore a Backup for BIMcloud Server or Manager

Restoring a Server Backup becomes necessary if, for example, one or more server computer(s) malfunction and you have to reinstall the BIMcloud Server and/or BIMcloud Manager.

You must restore the backup files for each reinstalled Server/BIMcloud Manager separately. You can only restore data for servers that have saved Backups.

See the section above: BIMcloud Server/BIMcloud Manager - Backups Panel.

To restore a Server Backup, follow these steps:

1. As needed, uninstall the corrupted BIMcloud Server components from the machine.
2. Reinstall the BIMcloud Server and/or BIMcloud Manager.

   **Notes about new BIMcloud installation:**
   - Make sure new installations are of the same version and Build number as the original installations! This is necessary in order to read the Backup files. In case of build/version discrepancy, you will get a warning telling you which Build you need to install.
   - If possible, use the same address and port settings for the new BIMcloud Server as for its original installation. (This way, the BIMcloud Manager can locate the newly installed Servers automatically.)
   - The new installations do not have to use the same Project data and Library data paths as the previous BIMcloud installations.

3. Click the BIMcloud tray icon.
4. Click the name of the component whose data you wish to restore: BIMcloud Server or BIMcloud Manager.
5. From its popup menu, choose **Restore from Backup**.

6. In the appearing dialog, browse for the Backup file you need.

   - Server Backups of BIMcloud Server have the extension "bcsb".
   - Server Backups of BIMcloud Manager have the extension "bcmb".
The Backup location was defined by you when you configured the BIMcloud Server or Manager. If you can’t remember the backup folder location, see the next section: Where are the Server Backup Files Located?

7. Click Restore.

8. Review the appearing dialog to check the name, creation date, size and version of the chosen Backup file.
   - **Also restore server settings (Recommended):** By default, this option is checked, and recommended. It means that you will restore not only the Teamwork projects and libraries, but also the port settings, keys, and configuration information of the originally installed BIMcloud Server/Manager.
   - Activating this checkbox is especially important if you are restoring only one Server component: this way, the other components will automatically locate the restored component.

9. Click Restore. The Server data are restored, and the Server will start up.

10. If you restored a BIMcloud Server, the appearing dialog reminds you to check that the new BIMcloud Server’s primary address is accessible by the BIMcloud Manager.
    
    If the reinstalled BIMcloud Server has a different primary address than before (i.e. it’s on a different computer), you must add this address information manually:
    - Go to BIMcloud Manager
    - Go to the Servers page
    - Select the BIMcloud Server you reinstalled
    - On the Settings panel, go to Connection and enter the primary address of the reinstalled BIMcloud Server.

    **Note:** Even if you have entered the new primary address, it is a good idea to add the previous primary address as an alternative (provided it is not in use by another computer). This way, you will not have to re-link external content and libraries manually.

    Once you have finished Server Backup Restore, you can start working again.

**New Backups Created After the Restore Process**

Old (pre-Restore) Backup files will be deleted as soon as a new Backup is created, if the Backup path remains the same as before.
Where are the Server Backup Files Located?

Server Backup files are saved to the location(s) you specified in the Configuration process, when you installed the BIMcloud Server and BIMcloud Manager.  
See *BIMcloud Manager Configuration* and *BIMcloud Server Configuration*.

To check these locations, locate the BIMcloud Server's tray icon. Right-click, then find the component you need and click **Configure** from the available commands.
Hosted Teamwork Projects/Libraries

The Projects and Libraries panels are available for each selected BIMcloud Server or folder, on the Servers page of BIMcloud Manager. They list all projects/libraries hosted by the current Server, even if they are not used by the Manager.

Hosted Teamwork Projects/Hosted Libraries

- **Name**: Name and path of the project/library. If the data is unused, then it displays the last known name and path of the data
- **Version**: Version of the ARCHICAD project
- **Status**: OK / Unused. A Status of Unused means that the Manager does not have any project/library which uses this data.
- **Last activity**: Last time the data was accessed
- **Last backup**
- **Active users**: Number of currently joined users in a project
Available commands for selected Project/Library

- **Delete**: Deletes the project/library
- **Load as new project/library**: Only available for Unused projects/libraries. Creates a new project/library on the Manager from the hosted data.
- **Link to existing project/library**: Only available for Unused projects/libraries. Links the data to a Missing project/library.

**Missing or Unused projects/libraries**

If the BIMcloud Manager refers to a project/library on a Server, but the project/library is no longer there, then it is listed in the Missing projects or Missing libraries section.

The BIMcloud Manager and the BIMcloud Server are separate programs. A project/library that is listed in the Navigator of the BIMcloud Manager must have a linked project or library data available on the Server as well. Also, the reverse is also true: data hosted on the Server must be linked to a project/library entity on the Manager.

Sometimes the two components will become out of sync (e.g. one of the components was restored from a snapshot).

Depending on which component was rolled back, two kind of errors are possible:

- **Missing project/library**: A project/library exists on the BIMcloud Manager (it is visible in the Project Navigator), but the data it refers to on the host Server is missing
- **Unused project/library**: project/library data exists on the Server, but the BIMcloud Manager does not know about it and does not have a matching entry in the project/library Navigator

Available functions:

- **Delete**: Removes the project from the BIMcloud Manager
- **Link to hosted project**: The project/library can be re-linked to an Unused project/library hosted on the current or any other Server
Access Panel

Use the Access panels to provide users with permission to view or modify data in the BIMcloud Manager and in ARCHICAD Teamwork projects.

This table summarizes the pages of BIMcloud Manager where the Access Panel is available. Except on the Projects page, you must always be in Detailed Management Mode in order to see the Access Panel.

<table>
<thead>
<tr>
<th>Content Type in BIMcloud Manager</th>
<th>BIMcloud</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Detailed Management Mode required</td>
</tr>
<tr>
<td>User Groups</td>
<td>Detailed Management Mode required</td>
</tr>
<tr>
<td>Servers</td>
<td>Detailed Management Mode required</td>
</tr>
<tr>
<td>Roles</td>
<td>Detailed Management Mode required</td>
</tr>
<tr>
<td>Projects</td>
<td>Simplified or Detailed Management</td>
</tr>
<tr>
<td>Project Folders and BIMcloud Projects</td>
<td>Simplified or Detailed Management</td>
</tr>
</tbody>
</table>

See Permission Management: Simplified and Detailed.

Required permissions to view Access panels:

- Simplified management:
  - Projects: Project or Server administrator
  - Other pages: Access panel not available

- Detailed management: View access for the selected item (Users, Servers, Roles)

Required permissions to modify data on Access panels:

- Simplified management:
  - Projects: Project or Server administrator

- Detailed management: Modify access for the selected item

Topics in this section:

Access Panel View Modes
Granting Access
Users Without Access
Revoke Access
Permission Management: Simplified and Detailed
Troubleshooting: Permissions Deadlock
List of Permissions
Access Panel View Modes

The Access panel has three view modes:

**Compact View**
**Summarize by Users**
**Permissions View (Details)**

**Compact View**

To switch between Compact View and Summarize by Users, use the View pop-up above the list.

Compact view lists the granted accesses as they were defined. The list is divided into two parts: the upper part shows the access definitions created locally, while the bottom part shows the access definitions inherited from parent elements. (The bottom part of the list is visible only when there are inherited access definitions.)

**Columns**

- User/group name
- Assigned role(s)
  - If a role is an inherited role, then you can hover the cursor over it to see the source of the inherited role.
Select an item from the list and click Details to see and/or customize the included permissions. See Permissions View (Details).

**Summarize by Users**

To switch between Compact View and Summarize by Users, use the View pop-up above the list.

Permissions might be granted to users and groups on many different levels. This makes it difficult to understand a user’s permissions set for the selected content item. In this case, use the **Summarize by Users** view to unfold all the groups and summarize all permissions at all levels.

In this view, all groups are unfolded: only the users are listed together with their role (or roles). Hover over a specific role to see where it has been inherited from.

**Columns**

- User name
- Assigned role(s)
  - If a role is an inherited role, then you can hover the cursor over it to see where the role was granted.

Select an item from the list and click Details to see and/or customize the included permissions. See Permissions View (Details).
Permissions View (Details)

To switch to Permissions view:

In the Access panel, select an item in the list and click the Info icon.

This view unfolds the roles and summarizes the permissions granted to the clicked user or group.

The permissions are listed in rows; and the roles are shown in columns. The column headers indicate where and how that role was assigned to the selected user/group.

The Summary column shows the aggregated permission set for the selected user/group.

Permissions allow the user to perform a specific operation. Permissions can have three statuses:
- Not granted: Empty checkbox
• Granted: Checked checkbox
• Granted, but revoked: Checkbox with red X mark

**Edit Permissions**

Click **Edit** on the header to make the Custom role appear.

(The Custom role column is the only place where you can revoke a permission.)

• Click once in the checkbox to **activate the permission** (with a checkmark)
• Click a second time in the checkbox to **revoke the permission** (with a red X).

The result of the editing is immediately shown in the Summary column. Click **Save** to store your changes.

**Related topic:**

- **Granting Access**
- **Revoke Access**
Granting Access

An access definition has three elements:

- **Which** item is accessible by
- **Whom**, and
- **What** can he/she do with it

*Note:* This kind of access definition, known as ACL (Access Control List), is widely used in the IT industry. ACL specifies which users are granted access to content items, as well as which permissions are allowed for a given content item.

To grant access to content items on the BIMcloud, follow these three steps:

1. Select the item in the Navigator.
2. Open the Access panel and start to type the name of who can access it, or click Search. To grant access to all users, use the special Everyone group.
3. Choose a role for the selected user or group – this defines **what role** he/she will have for the selected item. Each role includes a set of permissions.

For more information, see **Roles Available when Granting Access**.

If multiple content items are selected in the Navigator, then the Access panel will not list the already existing access definitions to these items. You can still grant new accesses: they will be applied to all of the selected content items for which you have Modify Access permission.

To modify a user’s permission for a specific content item: define a Custom role for that particular item. This is described here: **Permissions View (Details)**.

**Related Topics:**
- Roles Available when Granting Access
- Inheritance of Access Rights
- Traversing
- Permissions and Dependence
- Revoke Access
Roles Available when Granting Access

Default Role in User Settings
Each user can have a default role defined in their user settings. (A default role is optional.)

When defining access, the user’s default role is the automatically selected option. If someone modifies the default role of the user, this access definition will automatically be modified accordingly.

If a group is granted access using the default role, then each group member brings his/her own default role.
Custom Access

Sometimes it is easier to grant certain permissions locally to someone for a content item, without saving this permission set as a new generic role. In this case, when granting Access, select **Custom** from the pop-up, then click **Save**.

The permissions page will automatically open and you will be able to pick the necessary permissions as part of a custom role for the selected user/group. Click **Save** to store your changes.
### Tom Sawyer permissions for Airport Terminal

<table>
<thead>
<tr>
<th>Summary</th>
<th>Custom</th>
<th>Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARCHICAD - Navigator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARCHICAD - Attributes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARCHICAD - Tools</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Design tool elements</td>
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<td></td>
</tr>
<tr>
<td>Document tool elements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grid tool elements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural Analytical tool elements</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>ARCHICAD - More</td>
<td>✓</td>
<td></td>
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<tr>
<td>ARCHICAD - Details, info</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARCHICAD - External Context</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

See Permissions View (Details).
Inheritance of Access Rights

An important feature of the Access definition is its inheritance: Access granted at a higher level of the folder hierarchy is *inherited downwards by all of its child elements*. The final permission set for a user for the content item is an aggregate of all roles which have been assigned to him/her (or to a group in which he is a member). If a permission has been revoked, then it cannot be re-granted again at a lower level in a hierarchy.
Traversing

If a user’s role includes View item permission for a content item, then he/she must be able to find this content item in the Navigator in order to work with it - even if the user does not have View item permission for the parent folders (including the Root folder) of the content item.

Traversing ensures that users will be always able to access all content items for which they have View item permission - even if they do not have permission to access the parent folders.

In this case, the parent folders, including the Root (which would otherwise be hidden from the user) will be visible in the Navigator and the user can traverse through them, but no additional information will be displayed about that parent folder even if the user selects it.

If access to the content item is revoked from the user, these traversed parent folders will automatically disappear too.

Notes:
- Traversing works for all content types, even those without multi-level hierarchies (Roles and users).
- Traversing does NOT work for Change notifications on BIMcloud. If you can see a folder only because of traversing, you cannot subscribe to that folder - you must have explicit view permissions.

Example:
• Hierarchy in Navigator:
  - Folder A
    - Project A

You have View item permission for Project A, but you do not have any permission for Folder A. Folder A will be still visible in the Navigator to allow traversing through it, but no additional information will be displayed about Folder A.

You can subscribe to changes on Project A, but you cannot subscribe to changes on Folder A.
Permissions and Dependence

Some permissions apply only to a very specific content type on the BIMcloud (e.g. Start/Stop Server is only applicable to the Servers content type). If a specific permission does not make sense for a content type where it has been granted, then it simply has no effect.

Certain permissions will only be effective if another permission is also granted.

Examples:

- **View Item** permission is superior to all other permissions. If a user does not have **View Item** permissions, then the other permissions related to that item will not be effective, since the user cannot find the item in the BIMcloud Manager.

- **View Access** permission is superior to the **Modify Access** permission. The Access panel of an item will only appear if the **View Access** permission is also granted. Without seeing the Access panel, it is not possible to edit anything on it.
Users Without Access

If a requested page is not accessible to the user, a warning message appears. (For example, if the user receives an URL for a project, but he does not have access to that project.)

No access

You do not have the necessary permission to access this page.

Go to Home screen

Internal links between content items (e.g. a link from a user’s page to a project he is currently joined in to) are only active if the user has access to that Project as well. Otherwise the link will not work and a warning pop-up will appear.
Revoke Access

To revoke a user's access to content item from a user:

1. Open the content item's Access panel
2. Hover over the user you would like to remove.
3. Click the **Delete** icon.

   ![Image](image.png)

However, if the user has been granted access as a member of a group, then it is not possible to revoke the individual user's access.

The solution is to assign the user a Custom role, and then revoke specific permissions:

1. Start to type the name of the user and pick the name from the pop-up list.
2. Select **Custom role** from the Role pop-up.
3. Click **Save**.

The permissions view for the selected user will open immediately: revoke any permissions by clicking twice in the box to create a red X.

   ![Image](image.png)

**Important hint:** To revoke all permissions, it is enough to uncheck the **View item** permission box in the Custom column. From that point on, the user will not be able to see the current content item at all. Consequently, the user cannot exercise any other existing permissions either.

See Permissions and Dependence.

Similarly, if access has been granted to a user on a content item at a higher level in the hierarchy, then it can be revoked at a lower level only by assigning a Custom role to the user.

**Note:** You can revoke a specific permission only if you can do so at the level that the permission was first granted. That is, if a permission was granted to a user as a result of inheritance from a higher level, you cannot revoke that permission unless you can also access and modify the higher level.
Example:
- Hierarchy in Navigator:
  - Folder A
  - Folder B
- Access granted to Folder A:
  - User A – full access
  - User B – no access
- User A grants User B full access to Folder B

If User B would like to revoke User A’s access to Folder B, he cannot do so, because he has no permissions to Folder A, where User A’s access was original granted. Thus, User B cannot block User A from Folder B.

If a permission has been revoked, then it cannot be re-granted again at a lower level in a hierarchy. (Revoking is final.)
Permission Management: Simplified and Detailed

Each content item on the BIMcloud has its own Access panel. The Access panel defines which users can access the selected item, and which specific actions they are allowed to take.

BIMcloud offers two approaches to permission management: Simplified and Detailed.
- “Simplified” uses two built-in management roles to control access to the BIMcloud.
- “Detailed” allows you to create any number of server management roles containing different permissions.

Use Detailed permissions to set up detailed access for all BIMcloud content.

Choose Simplified or Detailed Management Roles
1. Go to the Servers page of BIMcloud Manager.
2. From the Servers list, select “BIMcloud Manager” (as shown on the screenshot below)
3. Click the Settings panel.
4. At General settings, click Edit.
5. At “Management roles”, choose either Simplified or Detailed.

Topics in this section:
- Simplified Management: Set User's Management Role
- Detailed Management
Simplified Management: Set User’s Management Role

With Simplified management, you can assign users to one of three groups: Server Administrator, Project Administrator, or “Not Set.”

To set a Management role (in Simplified Management):

1. Go to the Users page of BIMcloud Manager.
2. Select the User.
3. Click the Settings panel.
4. At Personal settings, open the Management role pop-up and choose a role:

- Server Administrator
- Project Administrator
- Not set

For each of these Management roles, the table below displays the level of access granted to each Root page of BIMcloud Manager.

Notes:
- “Full access”: Contains all permissions
- “View only”: Contains the View item permission only
### Predefined Roles in Simplified Management: What They Can Access

<table>
<thead>
<tr>
<th>Page of BIMcloud Manager (Root)</th>
<th>Server Administrator Role</th>
<th>Project Administrator Role</th>
<th>Role Not set</th>
<th>Master Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Projects</strong></td>
<td>Full access</td>
<td>Full access</td>
<td>View all...</td>
<td>Full access</td>
</tr>
<tr>
<td><strong>Users</strong></td>
<td>Full access</td>
<td>View only</td>
<td>View only</td>
<td>Full access</td>
</tr>
<tr>
<td><strong>Roles</strong></td>
<td>Full access</td>
<td>View only</td>
<td>Not available</td>
<td>Full access</td>
</tr>
<tr>
<td><strong>Servers</strong></td>
<td>Full access</td>
<td>View only</td>
<td>Not available</td>
<td>Full access</td>
</tr>
<tr>
<td><strong>My Tags</strong></td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
<td>Not available</td>
</tr>
<tr>
<td><strong>Servers</strong></td>
<td>Full access</td>
<td>View only</td>
<td>Not available</td>
<td>Full access</td>
</tr>
<tr>
<td><strong>Dashboard</strong></td>
<td>Available</td>
<td>Not available</td>
<td>Not available</td>
<td>Available</td>
</tr>
</tbody>
</table>
Detailed Management

What Happens When You Change to Detailed Mode?

All existing access permissions will be retained; all users can continue work without further interruption.

Two new User Groups appear on the Users page:

- Project Administrators
- Server Administrators

The existing Project and Server Administrators are added to these groups.

Two new roles are created on the Roles page:

- “Full access”: Contains all permissions
- “View only”: Contains the View item permission only

For these two User Groups, the table below displays the level of access automatically granted to each Root page of BIMcloud Manager.

<table>
<thead>
<tr>
<th>Page of BIMcloud Manager (Root)</th>
<th>Server Administrator User Group</th>
<th>Project Administrator User Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects</td>
<td>Full access</td>
<td>Full access</td>
</tr>
<tr>
<td>Users</td>
<td>Full access</td>
<td>View only</td>
</tr>
<tr>
<td>Roles</td>
<td>Full access</td>
<td>View only</td>
</tr>
<tr>
<td>Servers</td>
<td>Full access</td>
<td>View only</td>
</tr>
</tbody>
</table>

Due to the inheritance of the permissions, these new permissions will apply to all items under the root. You will be able to fine-tune all permissions from now on, for each and every content item.
Troubleshooting: Permissions Deadlock

In case of a system deadlock (e.g. permissions were revoked from all managers and no one is able to control the server), use the Master Administrator user to solve the problem.

The Master Administrator user is a built-in user. It is not possible to delete it, and it always has full access to the whole server. The Master Administrator does not appear on the user lists.

The login name for the Master Administrator is: masteradmin. The password was defined during the server installation in the BIMcloud Manager configurator. If you have forgotten the password, then re-run the BIMcloud Manager Configurator and define a new password.

**Note:** it is not recommended to use the Master Administrator user for everyday management tasks. Use it only in case of emergency.
List of Permissions

Topics in this section:
Management Related Permissions
ARCHICAD Related Permissions

Related Topics:
Permission Management: Simplified and Detailed
Troubleshooting: Permissions Deadlock
Management Related Permissions

These permissions enable a user to view or modify data on the BIMcloud Manager while using the Detailed management mode.

**View Item**
- User can view all settings related to the item, except
  - Access Panel - which also requires View Access permission
  - Activities Panel - which also requires View Activities permission
- If the item is a Project, a user with View Item permission can Open or Join the project from ARCHICAD

**View Activities**
- User can view the item's Activities panel (View Item permission also required)

**Modify Details**
- User can modify all settings related to this item (except Access settings)
- User must also have View item permission in order to carry out modifications

**View Access**
- User can view the item's Access settings (View Item permission also required)

**Modify Access**
- User can modify all Access settings related to the item
- User must also have View Access (and View Item) permissions in order to carry out modifications

**Modify Folder Content (Applicable to All Folders, Including All Root Folders)**
- User can create new folders within the folder. (Modify Details permission for the folder is also required)
- User can assign a new BIMcloud Server to the folder (using the Pair process)
- User can Share a project that is inside the folder
- User must also have View item permission for the folder in order to carry out the above functions

**Delete/Remove Folder Content (Applicable to All Folders, Including All Root Folders)**
- User can delete items (folders, projects, users, groups, roles) within the folder
- User can disconnect BIMcloud Server located within the folder
- User must also have View item permission for the folder in order to carry out the above functions

**Enable Tags**
- Use tags and view the My Tags page of BIMcloud Manager

**Enable/Disable User (Applicable to Users)**
- User can enable or disable a user
- User must also have View item permission in order to carry out the above functions

**Lock/Unlock Project (Applicable to a Particular Project)**
- User can lock or unlock the project
- User must also have View item permission for the project in order to carry out the above functions
Start/Stop Server (Applicable to a Particular Server)
• User can start or stop the server
• User must also have View item permission for the server in order to carry out the above functions

Modify Hosted Data on BIMcloud Server (Applicable to a Particular BIMcloud Server)
• User can assign this BIMcloud Server as the default server of a Project folder
See Default Server(s) for Teamwork Projects.
• User must also have View item permission for this server in order to carry out the above functions

Manage BIMcloud Manager Licenses
Applicable to a particular user and to the BIMcloud Manager's Licenses panel.
• User can assign or revoke Licenses for the user
• User can modify the settings (add/revoke/upgrade) of the BIMcloud Manager's Licenses panel
• User must also have View item permission for the user or server in order to carry out the above functions
ARCHICAD Related Permissions

These permissions enable an ARCHICAD user to create, delete/modify, and/or manage particular data types in Teamwork projects using ARCHICAD.

The following are the predefined permissions for Teamwork projects. Most are self-explanatory. In this table, we have added a brief explanation where warranted.

<table>
<thead>
<tr>
<th>ARCHICAD Navigator</th>
<th>Description</th>
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<tr>
<td>Layouts and Subsets - Create</td>
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<tr>
<td>Layouts and Subsets - Delete/Modify</td>
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<tr>
<td>Master layouts - Create</td>
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<tr>
<td>Master layouts - Delete/Modify</td>
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<tr>
<td>Publisher Sets - Create</td>
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<tr>
<td>Publisher Sets - Delete/Modify</td>
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<tr>
<td>Publisher Sets - Publish</td>
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</tr>
<tr>
<td>Transmittal Set – Manage</td>
<td>Enables you to create a new Transmittal Set, to include or remove Layouts in the Transmittal Set, to edit the data of an open Transmittal Set or delete an open Transmittal Set, and to close an Transmittal Set.</td>
</tr>
<tr>
<td>Transmittal Set – Modify History</td>
<td>Enables you to reopen a closed Transmittal Set and to revise the data (name, ID) of a closed Transmittal Set.</td>
</tr>
<tr>
<td>Schedules and Indexes - Create</td>
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<tr>
<td>Schedules and Indexes - Delete/Modify</td>
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<tr>
<td>Set Up List Schemes - Manage</td>
<td></td>
</tr>
<tr>
<td>Story - Create</td>
<td>Enables you to create a new story using Navigator context menu or the Story Settings dialog box, provided you have reserved that dialog box. Not associated with the “Viewpoint - Manage” permission.</td>
</tr>
<tr>
<td>Story - Delete/Modify</td>
<td>Not associated with the “Viewpoint - Manage” permission.</td>
</tr>
<tr>
<td>Viewpoint - Manage</td>
<td>Enables user to create, modify and delete source markers and independent markers (e.g. markers which create a new viewpoint). If you do not have this right, you can only place linked-type Section/Elevation/IE and Detail/Worksheet markers.</td>
</tr>
<tr>
<td>Views and Folders - Create</td>
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<tr>
<td>Views and Folders - Delete/Modify</td>
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<td>ARCHICAD Related Permissions</td>
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<td>Cities - Delete/Modify</td>
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<td>Composites - Delete/Modify</td>
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<td>Fill types - Create</td>
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<td>Fill types - Delete/Modify</td>
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<td>Layers/Layer Combinations - Create</td>
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<td>Layers/Layer Combinations - Delete/Modify</td>
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<td>Line types - Delete/Modify</td>
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<td>MEP System - Create</td>
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<td>MEP System - Delete/Modify</td>
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<td>Markup styles - Create</td>
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<td>Markup styles - Delete/Modify</td>
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<td>Surfaces - Create</td>
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<td>Operation Profile - Create</td>
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<td>Operation Profile - Delete/Modify</td>
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<td>Pen sets - Create</td>
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<td>Pen sets - Delete/Modify</td>
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<td>Profiles - Create</td>
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<td>Profiles - Delete/Modify</td>
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<td>Renovation Override Styles - Manage (in AC projects up to v19)</td>
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<td></td>
<td>Zone categories - Create</td>
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<td>Zone categories - Delete/Modify</td>
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<td><strong>ARCHICAD - Tools</strong></td>
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<td>All ARCHICAD tools listed in the Design Tools sub-menu</td>
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<td></td>
<td>Document Tool Elements</td>
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<td></td>
<td>All ARCHICAD tools listed in the Documenting Tools sub-menu</td>
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<td>Grid tool elements</td>
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<td>StructuralAnalytical tool elements</td>
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<td>ARCHICAD Related Permissions</td>
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<td><strong>ARCHICAD - More</strong></td>
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<td>3D Styles - Create</td>
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<td>3D Styles - Delete/Modify</td>
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<td>Element Transfer Settings - Create</td>
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<td>Element Transfer Settings - Delete/Modify</td>
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<td>Favorites - Create</td>
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<tr>
<td>Favorites - Delete/Modify</td>
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<tr>
<td>Graphic Overrides - Create</td>
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<tr>
<td>Graphic Overrides - Delete/Modify</td>
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<tr>
<td>IFC Translators - Manage</td>
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<td>Issue - Create</td>
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<tr>
<td>Issue - Delete/Modify</td>
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<tr>
<td>Model view options - Create</td>
<td></td>
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<tr>
<td>Model view options - Delete/Modify</td>
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<tr>
<td>PLN Snapshot - Use computer for creation</td>
<td></td>
</tr>
<tr>
<td>Enables PLN snapshots (scheduled in BIMcloud Manager) to be run on this user's computer.</td>
<td></td>
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<tr>
<td>Classification and Properties - Create</td>
<td></td>
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<tr>
<td>Classification and Properties - Delete/Modify</td>
<td></td>
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<tr>
<td>Public Find/Select criteria - Create</td>
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<tr>
<td>Public Find/Select criteria - Delete/Modify</td>
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<td>Rendering scene - Create</td>
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<td>Rendering scene - Delete/Modify</td>
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<td>Renovation Filter - Create</td>
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<tr>
<td>Renovation Filter - Delete/Modify</td>
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<tr>
<td>Change - Create</td>
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<tr>
<td>Change – Delete/Modify</td>
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<tr>
<td>Save as PLN/PLA/TPL, MOD, GSM</td>
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<tr>
<td>Save as DXF/DWG</td>
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<tr>
<td>Save as IFC</td>
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<td>Save as RVT</td>
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<tr>
<td>Save as SAF</td>
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<tr>
<td>Structural Analytical Model Generation Rules - Manage</td>
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<tr>
<td>SAF Translators - Manage</td>
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<tr>
<td>Update to later ARCHICAD build</td>
<td></td>
</tr>
<tr>
<td>ARCHICAD Related Permissions</td>
<td></td>
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<tr>
<td>-------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>ARCHICAD - Details, Info</strong></td>
<td></td>
</tr>
<tr>
<td>Project Info</td>
<td></td>
</tr>
<tr>
<td>Project Location</td>
<td></td>
</tr>
<tr>
<td>Project Notes</td>
<td></td>
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<tr>
<td>Project Preferences</td>
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<tr>
<td>Project Preview</td>
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<tr>
<td><strong>ARCHICAD - External Content</strong></td>
<td></td>
</tr>
<tr>
<td>Add-ons setup - Manage</td>
<td></td>
</tr>
<tr>
<td>Enables user to load/unload the project’s Add-ons as listed in the Add-On Manager</td>
<td></td>
</tr>
<tr>
<td>External Drawings - Manage</td>
<td></td>
</tr>
<tr>
<td>Enables user to place drawings from an external source and to link placed drawings to an external source.</td>
<td></td>
</tr>
<tr>
<td>Hotlink Instances</td>
<td></td>
</tr>
<tr>
<td>Enables user to reserve, modify or delete instances of placed hotlink modules. Enables user to place additional instances of project’s existing hotlinks. Does not enable user to manage hotlinks of the project.</td>
<td></td>
</tr>
<tr>
<td>Hotlink and XREF - Manage</td>
<td></td>
</tr>
<tr>
<td>Enables user to add new hotlinks to the project, and to perform all commands in the Hotlink Manager. Enables user to attach XREFs and to manage XREF sources in the XREF Manager.</td>
<td></td>
</tr>
<tr>
<td>IFC Project Manager - Manage</td>
<td></td>
</tr>
<tr>
<td>Enables user to reserve and modify data (project, building, site, IfcGroup, IfcZone properties) in the IFC Project Manager dialog box (<strong>File &gt; Interoperability &gt; IFC Project Manager</strong>). Element-level Ifc Properties can be edited in IFC Manager only for elements which are not reserved by another user. <strong>Note:</strong> No permission is needed to edit IFC properties of elements in their Settings dialog box, if you have reserved the elements.</td>
<td></td>
</tr>
<tr>
<td>Libraries - Add/Remove: Enables user to add BIMcloud Libraries to the project using the Library Manager. (Does not enable user to manage server libraries - that requires permissions on the BIMcloud Manager.)</td>
<td></td>
</tr>
<tr>
<td>Library Part - Create</td>
<td></td>
</tr>
<tr>
<td>Library Part - Delete/Modify</td>
<td></td>
</tr>
<tr>
<td>XREF instances</td>
<td></td>
</tr>
<tr>
<td>Enables user to reserve, modify or delete XREF instances. Enables user to attach additional instances of project’s existing XREFs. Does not enable user to manage XREFs of the project.</td>
<td></td>
</tr>
</tbody>
</table>
Activities Panel

The Activities panel lists data related to user activities on the BIMcloud. The Activities panel is available for:

- Projects, Project folders
- Users, Groups
- Servers, Server folders

The available filters and columns vary depending on the content type. For Servers only, a graphical Activity Monitor is available. (See Server Activities Monitor.)

Filter Activities Data

- **Choose Activity Type:** Choose one or more activity types to display feedback. (Or choose All types.) If there was a comment attached to the activity, then it will be displayed in the second line of this column.
- **Size:** Filter the activities by the size of the data event. (Or choose All sizes.)
- **User:** Choose a user from the list to display his/her activities only. (Or choose All users.)
- **Project:** Choose a project from the list to display related activities only. (Or choose All projects.)
- **Range:** Limit the displayed activities to the Last 50; or to activities in the last day or last hour only.
  - Use From/To dates to narrow the display of events by date.
- **Search:** Type any text to search for it.

**Load more/Load all:** If the list does not contain all the possible elements, use the Load more or Load all buttons at the bottom to expand the list.

If a filter has been set, that column name is shown in blue for easier identification. To cancel a filter, select All from its options again.

Click the **Export** button to download all displayed entries in CSV format into your browser’s download folder.
Server Activities Monitor
Available on the Servers page, for a selected BIMcloud Server.

- **Select Chart:** Check the data items you want to view (CPU and RAM usage are checked by default.)
- **Select Range:** Choose a time interval from the pop-up menu at top right. ("Now" refers to the past one hour.)

The selected data types are now shown in graphical format in the chart, and as values at the top of the chart. If any data item’s usage runs into the High range, it is shown in red:
• Hover the cursor over any point on the graph see those data for a specific point in time.

• Zoom in or out (or use the plus/minus buttons) on the chart as needed.

**Refresh List**

Server Activities are listed below the chart.

To list only activities that occurred during the time range shown on the chart, click **Refresh List**.

**Required permissions to view Activities panels:**

- Simplified management:
  - Servers: **Server Administrator**
  - Users, Projects: **Project or Server administrator**
- Detailed management: **View Activities**
System Notifications

System notifications (warnings or info items) alert you to issues related to the functioning of the BIMcloud servers.

When enabled, Notifications appear automatically:

- in the Notifications dropdown (bell icon) on any page of BIMcloud Manager
- in the Notifications Dashboard (a separate page of BIMcloud Manager)
- as pop-ups, in a relevant location of the BIMcloud Manager web interface
- by email

Notifications are designed to be context sensitive. For example, where appropriate, you can click in the message to automatically navigate to the right page of BIMcloud Manager, where you can view and/or fix the particular issue.

A User will see only those Notifications that are relevant, based on his/her User Role and permissions.

Note: You can also subscribe to receive change notifications whenever certain items on the Projects page (files, folders) are modified. See Subscribe to Changes.

Topics in this section:
- Turn System Notifications On/Off
- System Notification Types: Warnings and Info
- View Dropdown List of Notifications
- Notification Pop-Ups
- Resolve the Issue
- Go to Notifications Dashboard
- Dashboard Interface
- Delete Notifications
- List of System Notifications

Turn System Notifications On/Off

Set up Notifications preferences for each User at User Settings (Notifications section).

- Display in BIMcloud Manager (this is On by default).
- Enable the option to receive a daily email listing the current Notifications for your BIMcloud Manager.

See System Notifications Section.

System Notification Types: Warnings and Info

Warning notifications require urgent action in order for work to continue:

- For example: Server not accessible; Licenses due to expire within a week; Backup failed; Critically high CPU/RAM usage.

Warning notifications use an icon with an exclamation point.

Info notifications are for situations that do not require immediate attention. Work can continue, at least in the short term.

- For example: Update available; Licenses due to expire within a month; LDAP sync failed.
Info notifications use the familiar Information icon.

Warning-Type and Info-Type Notification

View Dropdown List of Notifications

The Notifications dropdown, with the full list of current Notifications, is available from the top left corner of every page of BIMcloud Manager.

Notification Pop-Ups

You will also see Notifications in pop-ups at the relevant parts of BIMcloud Manager:

Click on a pop-up to get more information and navigate to the Dashboard.

Resolve the Issue

Notifications are designed to be context sensitive, and to allow you to easily navigate to the right page of BIMcloud Manager or other resource, so you can view and/or fix the issue.
For example:

1. The Notifications dropdown indicates an available License update.

2. Click **Details** to open the Dashboard.

3. In the Dashboard, the Notification tells you to go to License Manager Tool and update your license.

**Go to Notifications Dashboard**

The Notification Dashboard lists the currently active notifications for the BIMcloud. To access the Dashboard, do one of the following:

- Click on the “Dashboard” content type from the BIMcloud Home screen (visible to Server Administrators only)
- Click on **Details**, next to any item of the Notifications dropdown list
- Use **Go to Notification Dashboard**, at the bottom of the Notifications dropdown list
- Click the Notifications pop-up arrow from the BIMcloud Home screen
Go to Notification Dashboard

Dashboard Interface

View the list of current Notifications (Warnings and Information).

You can filter the list by Notification type:
Each item provides help on what you can do to resolve the issue.

For any item, click the arrow to automatically open the page of BIMcloud Manager or other location, where you can view or fix the issue as needed.

**Dashboard: Click Arrow to Navigate**

**Delete Notifications**

Some Notifications in the list disappear on their own when the issue is resolved (Auto delete). Other Notifications remain until you delete them manually (Manual delete).

*For info on how each Notification type is deleted, see List of System Notifications.*
To delete a Notification:

1. Hover over the Notification in either the Dashboard or the Notifications Dropdown.
2. The trash bin icon appears at left. Click to delete.
# List of System Notifications

<table>
<thead>
<tr>
<th>Type</th>
<th>Notification</th>
<th>Permissions required to see the Notification</th>
<th>How to Delete¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>![i]</td>
<td>License Update(s) Available</td>
<td>Server Admin</td>
<td>Manage Licenses for BIMcloud Manager</td>
</tr>
<tr>
<td>![i]</td>
<td>Server Update(s) Available</td>
<td>Server Admin</td>
<td>View and Modify Server</td>
</tr>
<tr>
<td>![i]</td>
<td>Server Activities - CPU or RAM usage</td>
<td>Server Admin</td>
<td>View and Modify Server</td>
</tr>
<tr>
<td>![i]</td>
<td>Insufficient Licenses (User cannot join a project because no license is available)</td>
<td>Server Admin</td>
<td>Manage Licenses</td>
</tr>
<tr>
<td>![i]</td>
<td>License About to Expire</td>
<td>Server Admin</td>
<td>Manage Licenses</td>
</tr>
<tr>
<td>![i]</td>
<td>BIMcloud Server configured as File Server</td>
<td>Server Admin</td>
<td>View and Modify Server</td>
</tr>
<tr>
<td>![⚠️]</td>
<td>Import Project/Library Failed</td>
<td>User who initiated the Import</td>
<td>Auto</td>
</tr>
<tr>
<td>![⚠️]</td>
<td>Change Host Failed</td>
<td>User who initiated the Change Host</td>
<td>Manual</td>
</tr>
<tr>
<td>![⚠️]</td>
<td>Server Backup Failed</td>
<td>Server Admin User who initiated the Backup (for immediate Backups only)</td>
<td>View and Modify Server User who initiated the Backup (for immediate backups only)</td>
</tr>
<tr>
<td>![⚠️]</td>
<td>Project/Library Snapshot Failed</td>
<td>Server Admin Project Admin</td>
<td>View and Modify Project User who initiated the Snapshot</td>
</tr>
<tr>
<td>![⚠️]</td>
<td>LDAP Sync Failed</td>
<td>Server Admin</td>
<td>View and Modify Project User who initiated the LDAP sync process</td>
</tr>
</tbody>
</table>

¹. “Auto” delete: This Notification type disappears on its own when the issue is resolved. “Manual” delete: This Notification type remains visible until you delete it manually. See also Delete Notifications.
Connection Settings

BIMcloud offers a very flexible method to set up and establish the connection between the different components. The identification of the BIMcloud component, and the address used to access it, are completely separated. This allows the users to use different addresses to connect to the same server and at the same time maintain the internal project links (even if it was added using a different address).

It is possible to prepare the server for all possible connections in advance and set up the different addresses centrally. This ensures that ARCHICAD users will not have to worry about how to connect, because the Server Administrator has set up everything. If the connection was not configured in all details on the server in advance, then the users are also able to add alternative addresses and connect using a custom address.

Terms

• **Primary address**: This is the unique identification of the server, set up by the person installing the BIMcloud.

• **Alternative addresses**: Predefined alternative addresses defined on the server, which can be used to connect to this server as well.

• **Local addresses**: Alternative address entered by the user in ARCHICAD.

• **Automatic address**: Automatic addresses are generated automatically based on the active address.

• **Fallback**: ARCHICAD is not able to communicate with the BIMcloud Server, so it uses the BIMcloud Manager as a bridge to connect.

• **Lookup order**: Priority-based list of all available addresses. ARCHICAD picks the active address from this list

• **Active address**: The address currently used by ARCHICAD to connect to the BIMcloud Manager.

• **Automatic/Manual address selection**: The method ARCHICAD uses to pick the Active address.

**Primary address**

This is the unique identification of the server, set up by the person installing the BIMcloud. There is only one primary address for each BIMcloud component.

ARCHICAD uses this address to uniquely identify the server – even if it is communicating using a different address at the moment. This addresses is also used when placing references to the server (e.g. placing a hotlinked module from a Teamwork project).

When ARCHICAD opens a project which contains a reference to a BIMcloud not yet known by ARCHICAD, then ARCHICAD will use the primary address stored in the hotlink reference to find the server:

• If the address is working, then ARCHICAD will download all the alternative addresses and pick the most suitable one based on priorities.
• If the address is not working, then it will prompt the user to enter a currently working address to the new server. Once a working address is entered, ARCHICAD will download the list of alternative addresses based on the pre-defined priorities.

Set up the Primary address on the Settings panel of each BIMcloud component.

It is recommended not to change the Primary address of the BIMcloud. In case it must be changed, it is a good practice to add the old Primary address to the list of alternative addresses – even if it is not working any more. This ensures that ARCHICAD will be able to identify links placed by the old Primary address and keep the references alive in projects.

**Alternative addresses**

The list of alternative addresses is a ‘menu’ for ARCHICAD. It will go through this list in a certain order (see [Lookup order](#)) and connect to the server using the first functioning one.

Alternative addresses can be pre-set on the BIMcloud Manager for every server component.

![Connection settings](connection-settings.png)

### Automatic address

Automatic addresses are available for BIMcloud Servers. Automatic addresses are not absolute addresses, but rather relative addresses. They are able to dynamically create an address based on the currently used address of the BIMcloud Manager. An example:

- **ARCHICAD** uses the `http://server-computer:1228` address to connect to the server

The Automatic address is `$protocol://$host:1229`

ARCHICAD will automatically use `http://server-computer:1229` to connect to the Server.

The user goes home and uses a different address to connect to the server through the internet: `https://bimcloud.company.com:1228`

ARCHICAD will automatically use `https://bimcloud.company.com:1229` to connect to the Server.

There are two automatic fields to generate automatic addresses:

- `$protocol`: the protocol part of the url; in the above example, this is `http` and `https`
- `$host`: the address part of the url without the protocol and the port. In the above example, this is: `server-computer` and `bimcloud.company.com`

### Fallback

In case ARCHICAD is not able to directly communicate with a BIMcloud Server, yet the BIMcloud Manager is accessible, then it will use the BIMcloud Manager as a ‘bridge’ to the BIMcloud Server and send all traffic through it. (Keep in mind that this kind of communication can affect the overall performance of BIMcloud, depending on the locations of the different components.)
Fallback communication might be a good choice when accessing the BIMcloud from outside the office, because it requires the IT administrator to open only one port on the company firewall.

Lookup order
When ARCHICAD tries to connect to a BIMcloud, it will go through the addresses in a certain order. This order can be set on the BIMcloud Manager. Alternative addresses added locally from ARCHICAD will always be at the end of the lookup order.

Automatic / Manual address selection
It is possible to override the address selected automatically by ARCHICAD, and force it to use a specific address instead. Use ARCHICAD’s Network Diagnostic tool to override the automatically selected address. Keep in mind that manually selecting an address might force ARCHICAD into an offline state even if there is a different – currently working – alternative address available.

Connection Process
ARCHICAD goes through the following steps when it connects to a BIMcloud.

When Adding a New BIMcloud Server:
When the user adds a new server to the server list, ARCHICAD asks for an address, a username and a matching password.
ARCHICAD connects to the BIMcloud Manager using the entered address and:
• Downloads its primary address and stores it as a unique identifier for this new server
• Downloads the list of alternative addresses and the lookup order
• Automatically selects the most suitable address based on the lookup order

When re-connecting to a currently offline server:
When ARCHICAD detects that the selected server is offline, the user will be able to start ARCHICAD’s Network Diagnostic tool and enter a new alternative address for the server. ARCHICAD will remember this alternative address in the future and use it in the lookup order when trying to connect to this server.

When connecting to an unknown server referenced from a hotlink module or a library:
Hotlink modules and Linked libraries contain the Primary address of their server in the reference. When ARCHICAD is about to check their status, it will use this Primary Address to identify the server.
• If this server is already known by ARCHICAD (it is available on its server list), then it will go through the regular connection process and pick the most suitable address automatically.
• If the server is not known yet, but the stored Primary Address is working, then it will automatically download the additional connection details and pick the most suitable address automatically.
• If the server is not known yet and the link does not work either, then ARCHICAD will prompt the user to enter a working alternative address to the server. Once a working address is entered, it will download the additional connection details and pick the most suitable address automatically.

Best Practice
Setting up multiple alternative addresses on the BIMcloud ensures that:
• ARCHICAD users will not have to worry about how the ARCHICAD connects to the BIMcloud; the IT administrator sets everything up
• The connection will always be optimal
Direct connection between the components is always the most effective way of communication. Any extra routes or processing will only increase the transfer time:

- **http proxy servers**: data is always tunneled through a common server and then forwarded to the relevant component
- **https security**: data is always encoded and decoded
- **fallback communication**: data is tunneled through BIMcloud Manager

The best practice for setting up addresses and the lookup order is to start with the most effective way of communication and then add the less effective ones:

1. Direct connection with an IP address: `http://192.168.1.101:1228`
2. Direct connection with a computer name: `http://server-computer:1228`
3. Connection with a fully qualified address: `http://bimcloud.company.com:1228`
4. Connection through a secure connection: `https://bimcloud.company.com:1228`

ARCHICAD will automatically select the following addresses from the above list depending on its location:

- From the office it will pick either #1 or #2, because the computers are on the same LAN.
- From a branch office it will pick either #1, #2 or #3, depending on how the two LANs are connected.
- From a remote location with a simple internet connection it will always choose #4. It is the least effective method, but it automatically provides the highest level of security.

**Troubleshooting**

Use ARCHICAD’s built in Network Diagnostic tool to find and fix connection related errors.

The Network Diagnostic is accessible from all parts of the ARCHICAD interface at which you select and log in to a server, plus the Teamwork Palette, and the Work Environment Settings Network and Update page (if you have installed a Delta Cache Server with BIMcloud).

See the Network Diagnostic section in the Collaboration chapter of the ARCHICAD Reference Guide.
BIMcloud Tray Icon

The BIMcloud tray icon is automatically installed on the server computer(s); it is always executed at system start. This application is the control center of all installed BIMcloud components.

View Tray Icon

The tray application’s color indicates the status of the running BIMclouds:

- Black/white: All components are running
- Yellow: One or more components are not running
- Red: None of the components is running

**Note:** If a server has been manually stopped in the BIMcloud Manager, the tray will still indicate that the server connection is OK.

Access BIMcloud Components from Tray Icon

Click the tray icon to access installed BIMcloud components and related commands. BIMclouds are differentiated by their names (the BIMcloud name shown at BIMcloud Manager - General Settings.)

- Paired BIMcloud components (Manager plus Server) are grouped accordingly.
- Unpaired Servers are listed separately.

- Color indicates status of the component(s): Green for running, red for stopped, yellow for mixed status
Access Commands for BIMcloud Component

Click a component to see its related commands: