

# **Create a new trial Synapcus project and generate a corresponding BIM 360 project**

**(User guide)**

## **Prerequisites**

In order to be able to use the "*Synapcus Activities and Chat App*" (**SAC-App**) from Autodesk App Store, you must have:

- At least one BIM 360 User Account with Admin Rights
- At least one Synapcus User Account with Project Manager Rights (PM)

## **Prepare the SAC-App for using BIM 360 data**

Instructions for adding the SAC-App to a BIM 360 Account:

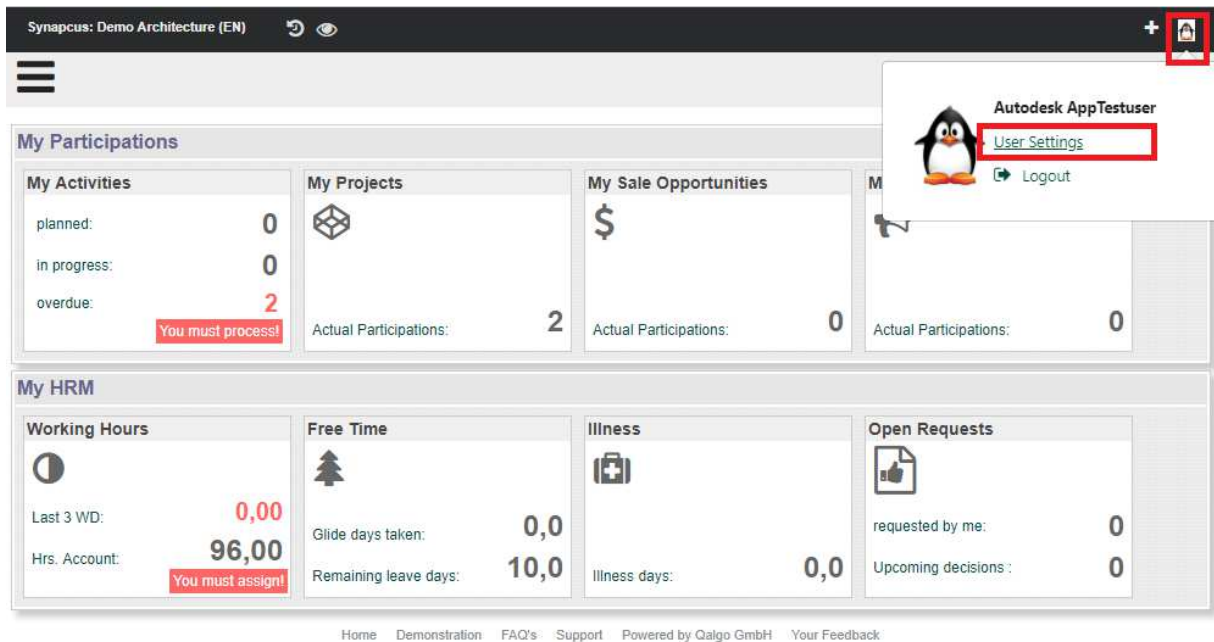
- BIM360 Admins can find the SAC-App in Account Administration under the "Apps" tab. Select to add to your BIM 360 Account. When prompted, please select "I am the developer".

Your SAC-App is now active in BIM 360.

## **Steps for creating a trial test project in Synapcus**

After installing the SAC-App using your BIM 360 Admin account, please follow these steps:

1. Login to Synapcus by using the credentials obtained from Qalgo GmbH (<http://qalgo.de/en/english-synapcus-test/>).
2. Connect your Synapcus account with your BIM 360 account by using the „**User Settings**“ dialog (by clicking on the user's picture in the upper top right corner).



Synapcus: Demo Architecture (EN)

Autodesk AppTestuser  
[User Settings](#)  
 Logout

**My Participations**

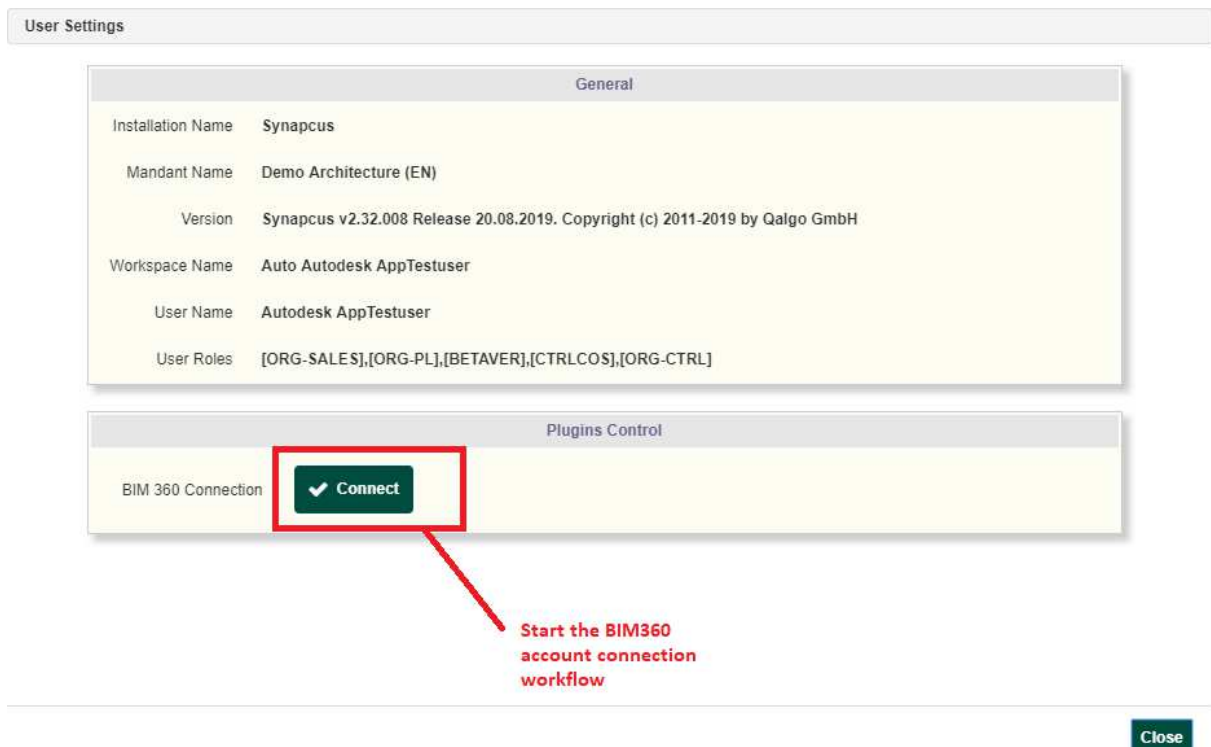
My Activities	My Projects	My Sale Opportunities	My HRM
planned: 0 in progress: 0 overdue: 2 <b>You must process!</b>	Actual Participations: 2	Actual Participations: 0	Actual Participations: 0

**My HRM**

Working Hours	Free Time	Illness	Open Requests
Last 3 WD: 0,00 Hrs. Account: 96,00 <b>You must assign!</b>	Glide days taken: 0,0 Remaining leave days: 10,0	Illness days: 0,0	requested by me: 0 Upcoming decisions: 0

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In this dialog, in the box "Plugins Control" please click the **"Connect"** button for starting the BIM 360 connection workflow. Follow the steps needed for the BIM 360 Autodesk connection workflow in the Autodesk frame.



User Settings

**General**

Installation Name: Synapcus  
 Mandant Name: Demo Architecture (EN)  
 Version: Synapcus v2.32.008 Release 20.08.2019. Copyright (c) 2011-2019 by Qalogo GmbH  
 Workspace Name: Auto Autodesk AppTestuser  
 User Name: Autodesk AppTestuser  
 User Roles: [ORG-SALES],[ORG-PL],[BETAVER],[CTRLCOS],[ORG-CTRL]

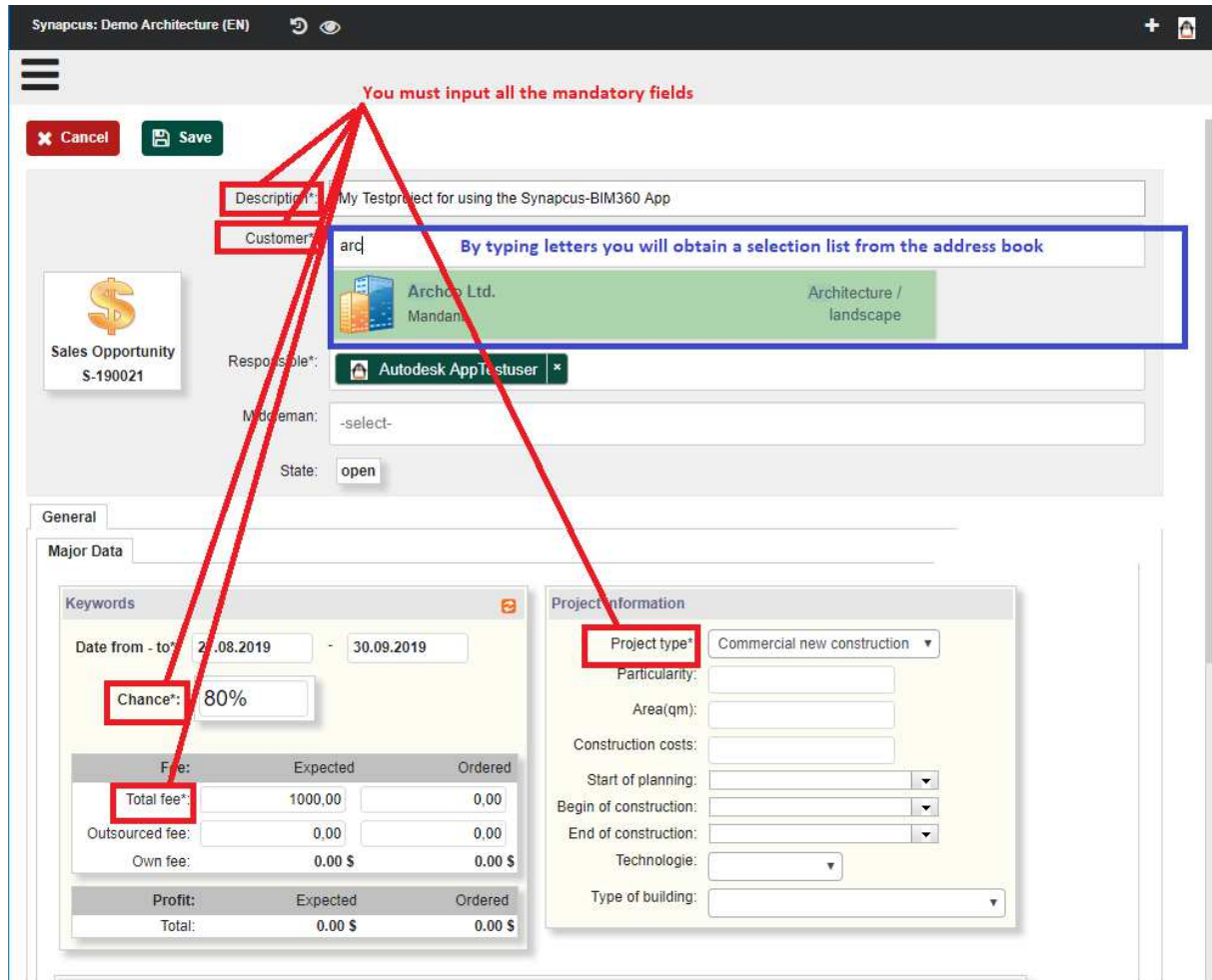
**Plugins Control**

BIM 360 Connection

**Start the BIM360 account connection workflow**

Close

3. In the Synapcus upper toolbar use the **"+" button to create a new sale opportunity** (a sale opportunity is the predecessor of a project). Fill in all the mandatory fields (marked through an asterisk \*) and save it.



**You must input all the mandatory fields**

**Cancel** **Save**

Description: My Testproject for using the Synapcus-BIM360 App

Customer: archi... *By typing letters you will obtain a selection list from the address book*

Archi... Ltd. Architecture / landscape  
Mandan...

Respons. role: Autodesk AppTester \*

Middleman: -select-

State: open

**General**

**Major Data**

**Keywords**

Date from - to: 20.08.2019 - 30.09.2019

Chance\*: 80%

Fee:	Expected	Ordered
Total fee*: 1000.00	1000.00	0.00
Outsourced fee: 0.00	0.00	0.00
Own fee: 0.00 \$	0.00 \$	0.00 \$

Profit:	Expected	Ordered
Total: 0.00 \$	0.00 \$	0.00 \$

**Project information**

Project type\*: Commercial new construction

Particularity:

Area(qm):

Construction costs:

Start of planning:

Begin of construction:

End of construction:

Technologie:

Type of building:

4. In the newly created sale opportunity click on the **"Complete"** button to transform it into an active project like in the screenshot below.

Synapcus: Demo Architecture (EN)

Display Save Extras Gantt Complete

Description\*: My Testproject for using the Synapcus-BIM360 App

Customer\*: Archco Ltd. x

Responsible\*: Autodesk AppTestuser x

Middleman: -select-

State: open

Sales Opportunity S-190021

General Positions Activities Documents Participants Expenses History

Major Data Contract

Keywords

Date from - to\*: 27.08.2019 - 30.09.2019

Chance\*: 80%

Fee:	Expected	Ordered
Total fee*:	100,000.00 \$	0.00 \$
Outsourced fee:	0.00 \$	0.00 \$
Own fee:	100,000.00 \$	0.00 \$

Profit:	Expected	Ordered
Total:	0.00 \$	0.00 \$

Project information

Project type\*: Commercial new construction

Particularity:

Area(qm):

Construction costs:

Start of planning:

Begin of construction:

End of construction:

Technologie:

Type of building:

Description

Source

Styles

Format

Now you will be prompted to input some supplementary data regarding the new project. Please fill up all the mandatory fields in this dialog box and continue with "OK".

### Completion of Sale Opportunity ✕

● Won ● Lost

Remarks on the conclusion of the sales opportunity:  
We always win the projects!

You must fill in all the mandatory fields!

The sales opportunity is changing into a project. Please fill out the project request from:

**Project key data**

Project type\*: Commercial new construction ▾

Particularity:

Area(qm):

Start of planning:

Begin of construction:

End of construction:


Technologie:

Building type:

**Project data**

Contractor\*: Archco Ltd. ▾

Customer\*: Archco Ltd.

Project responsible\*: 
 aut **By typing letters you can select yourself as the project responsible**  
 Autodesk AppTestuser  
 ★ Archco Ltd.  
 Mr.

Deputy project responsible:

Project Start - End\*:  -

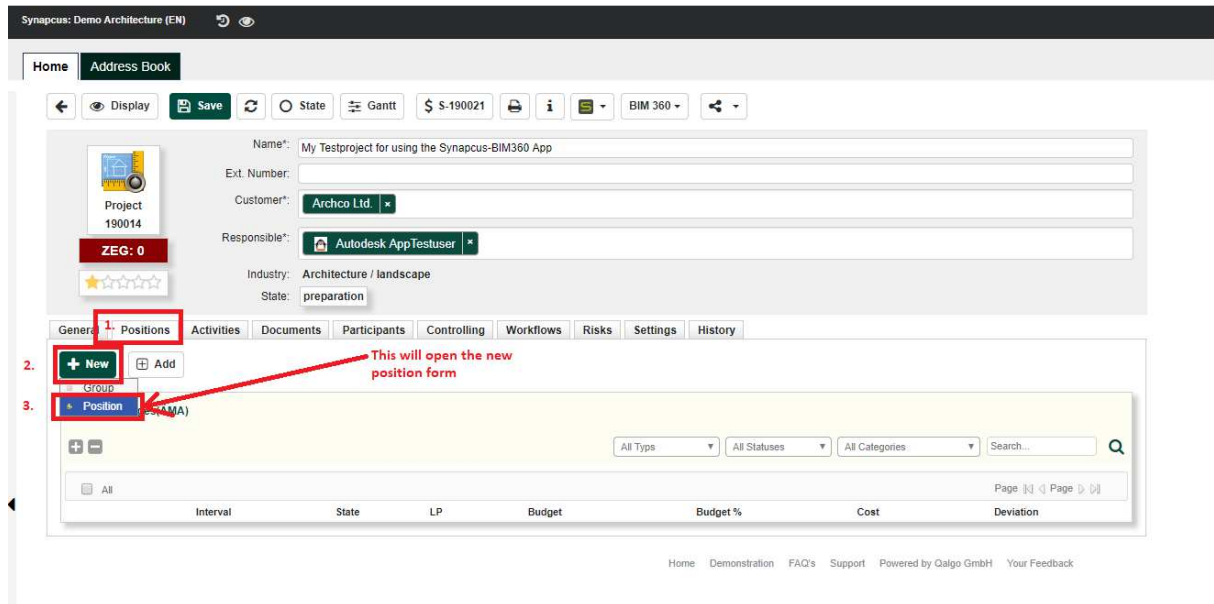
Acquired by:

Responsible GM:

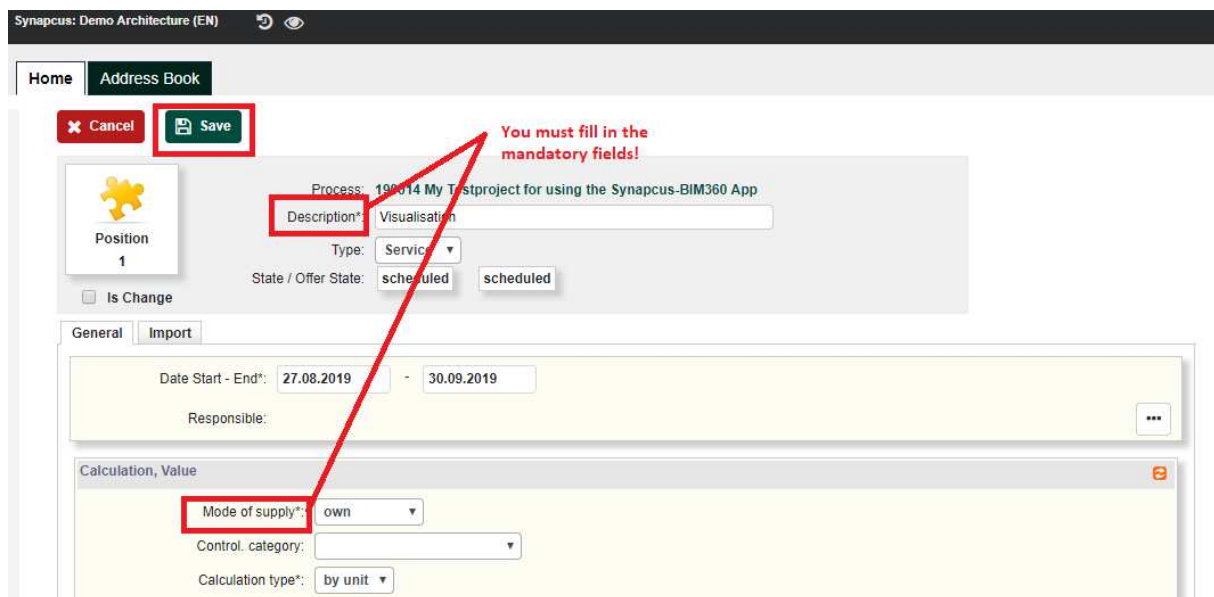
✓ OK
✕ Cancel

The Synapcus project will now be created. The system will directly open the newly created project form.

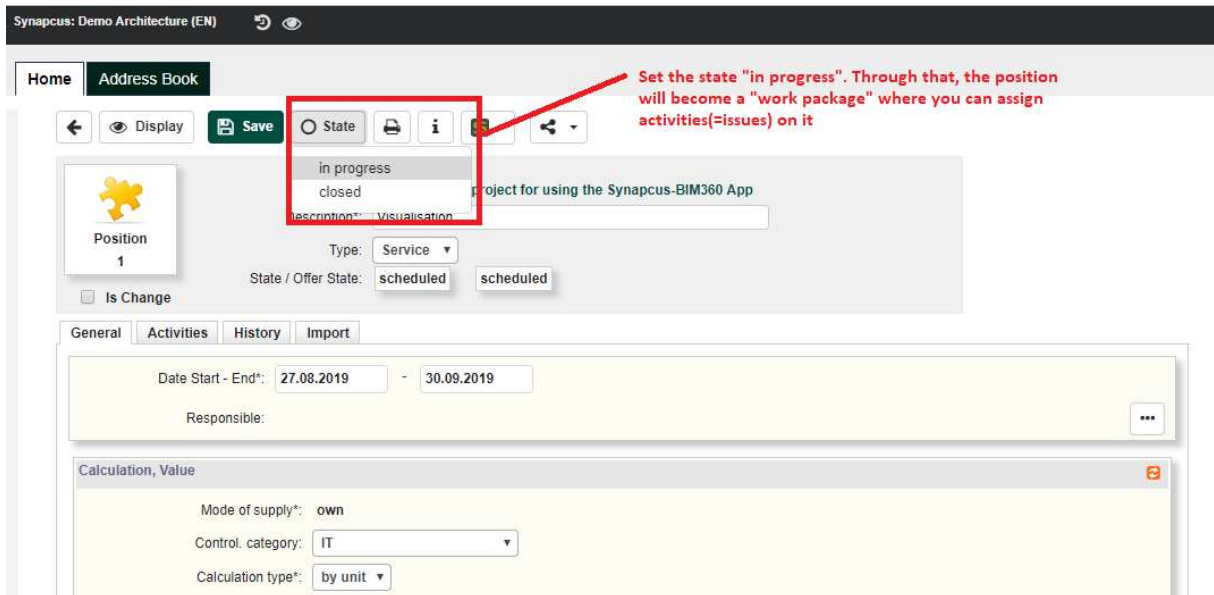
4. In the newly created Synapcus project form, create a new position under **Project/Positions/New-->Position** (name it for example "Visualisation").



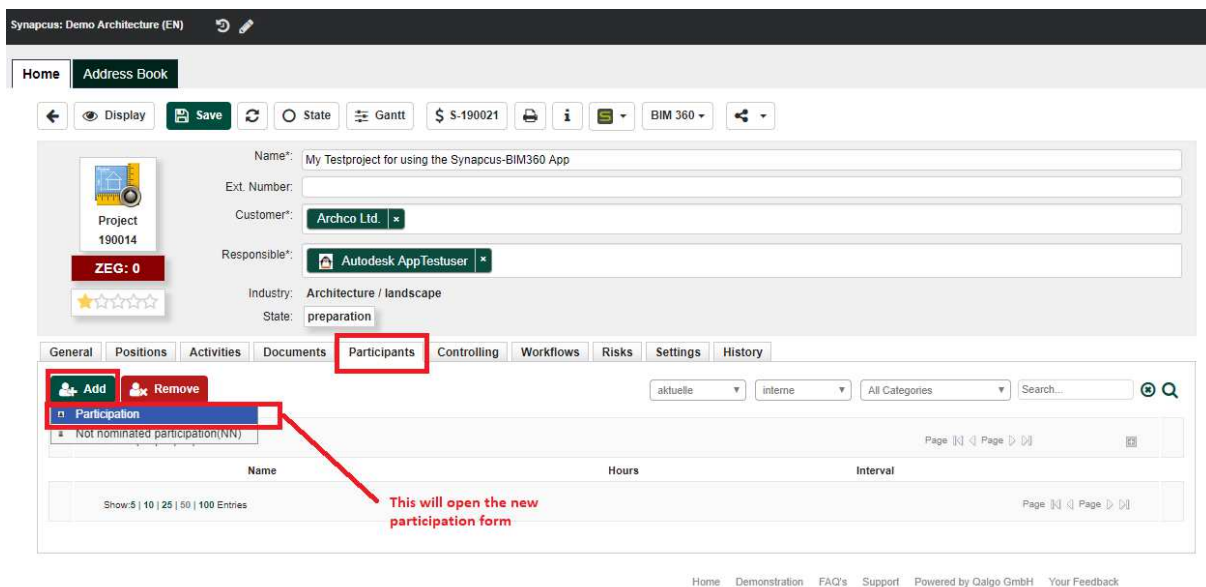
In the position form fill in the mandatory fields (mainly the position "Description") and save the document.




After saving the document, set the newly created position in the state **"on progress"**. Through that you assure that all the project participators can work on it – i.e. by creating and assigning activities (=issues) for this position.



5. In the Synapcus project form, create a new participation under **Project/Participations/Add-->Participation** (for you as a project participator).



In the participation form choose yourself as a participator and fill in all the mandatory fields:

Person\*  Autodesk AppTestuser \*

Catalogue Services: Student IT (1.5) ...

Role/Handiwork\*: PR.IT (IT) ...

Function\*: Project documentation (PD) ...

Special function: keine

Control. category: IT

**Beteiligung**

**General**

**Keywords**

Date Start - end\*: 27.08.2019 - 30.09.2019


**Project contact data**

Organization: Archco Ltd.  
Phone:  
Fax:  
Mobile:  
E-mail: apptestuser@autodesk.com

*Choose yourself from the address book list by typing the first letters*

*By choosing the person (employee) the role and function will be seted automatically*

6. In the Synapcus project form, use the button "**BIM 360 / Create BIM 360 project...**" to start the creation of a corresponding project in the BIM 360 system.

 BIM 360




**Project**  
190007  
ZEG: 1.000  
★★★★★

Name\*: Synapcus and BIM 360 test project  
Ext. Number:  
Customer\*: ABB Ltd  
Responsible\*: Acharya Sripathi  
Industry: Electronic  
State: preparation

**Start the BIM360 project creation**

**General** | Positions | Activities | Documents | Participants | Controlling | Workflows | Risks | Settings | History

**Project data**

Contractor\*: Archco Ltd.  
Customer\*: ABB Ltd  
Project responsible\*:  Acharya Sripathi  
Deputy project responsible:  
Project Start - End\*: August 22, 2019 - September 30, 2019  
Acquired by:  Acharya Sripathi  
Responsible GM:  Acharya Sripathi

**Project key data**

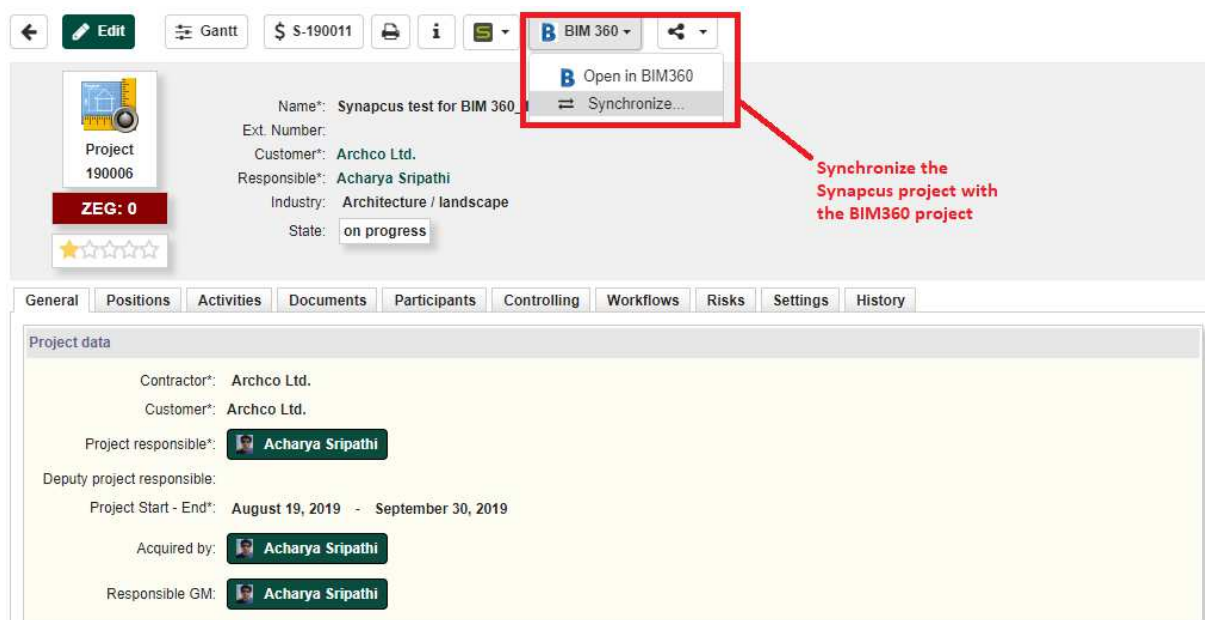
Project type\*: Interior design  
Particularity:  
Area(qm):  
Start of planning:  
Begin of construction:  
End of construction:  
Technologie:  
Building type:



7. **Now go into your BIM 360 account admin**, search the newly created project and be sure to give yourself as a admin user all the rights for services (**also "Insight"**)

8. **Now go into your BIM 360 newly created project**. In this BIM 360 project (section BIM 360 Documents) create a new subfolder (let's name it "**Synapcus**")

9. After this creation the Synapcus project is connected with the BIM 360 project (you will see the **blue BIM 360 button** on the top of the project form). Now at any time you can synchronize the entire project using the button "**BIM 360 / Synchronize...**".



10. **To download/link a BIM 360 3D-model to Synapcus**, set the Synapcus project form to „Edit“. In the tab section "Documents", please select the action "**Download from BIM 360 Cloud**". This will pop up a dialog box with all your existing BIM 360 project folders and files. Here you can choose the file/3D-model which shall be available in Synapcus (i.e. from the folder "Synapcus").

**Notice: Please be aware that the "New" button appears only if the project is in edit mode (Project/Edit).**

For further information about connecting the Synapcus account with your BIM 360 account please see <https://www.youtube.com/watch?v=bKg7Wq0i69E>.

For further information about creating a trial test project in Synapcus and generate a corresponding BIM 360 project please see <https://www.youtube.com/watch?v=yU9RADpUQ2A&t=56s>

### For using the Synapcus Activities and Chat App inside of Synapcus:

1. Login to Synapcus
2. Go to "**Home / My Cockpit**".
3. Open your newly created project which now is already connected to BIM 360 (see above the project creation). Your personal projects list can be found in "Home/My Cockpit" on the **right side of the Cockpit**.
4. Inside of the project form, under the "**Documents**" tab you can open an already downloaded/linked BIM 360 3D-model and create activities/issues on that model. Also virtual routes can be recorded and saved inside of this 3D-model.
5. After that, in the **integrated Forge Viewer** please use the right sided buttons from the bottom toolbar for: **showing a list of all the activities** (List symbol), **creating a new activity (+ Symbol)** or **create a new route** through the Synapcus Route Recorder.

For further information about creating activities and comments, please see the attached videos (<https://www.youtube.com/watch?v=2y96Sw-QZOo>).