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

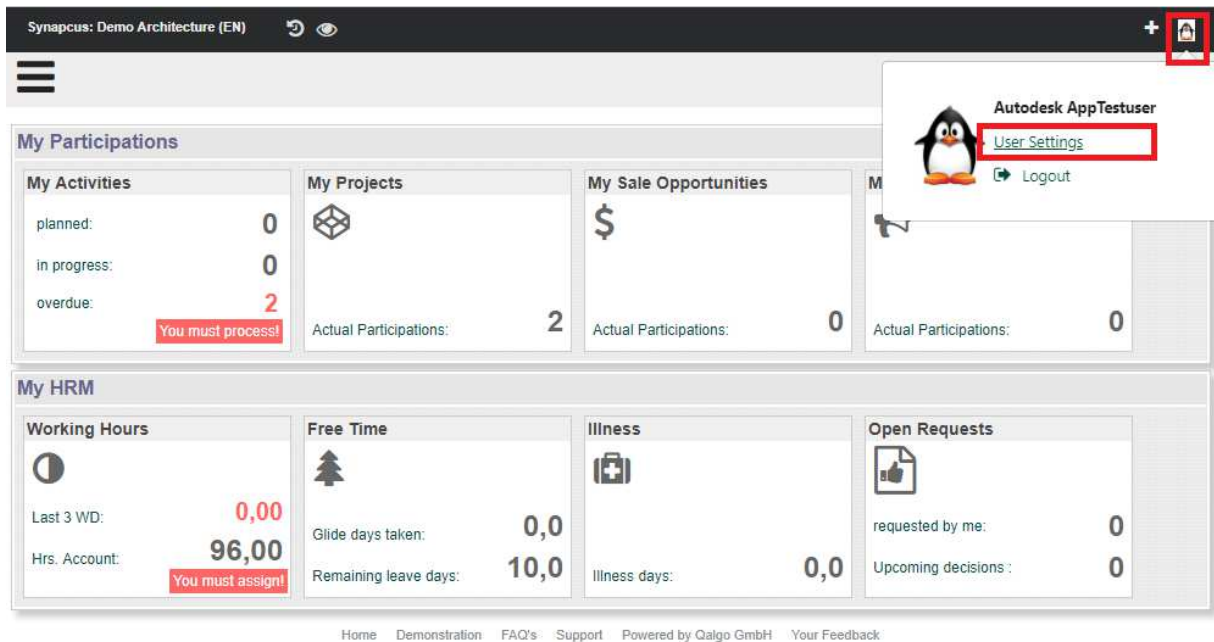Instructions for adding the SAC-App to a BIM 360 Account:

- 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).

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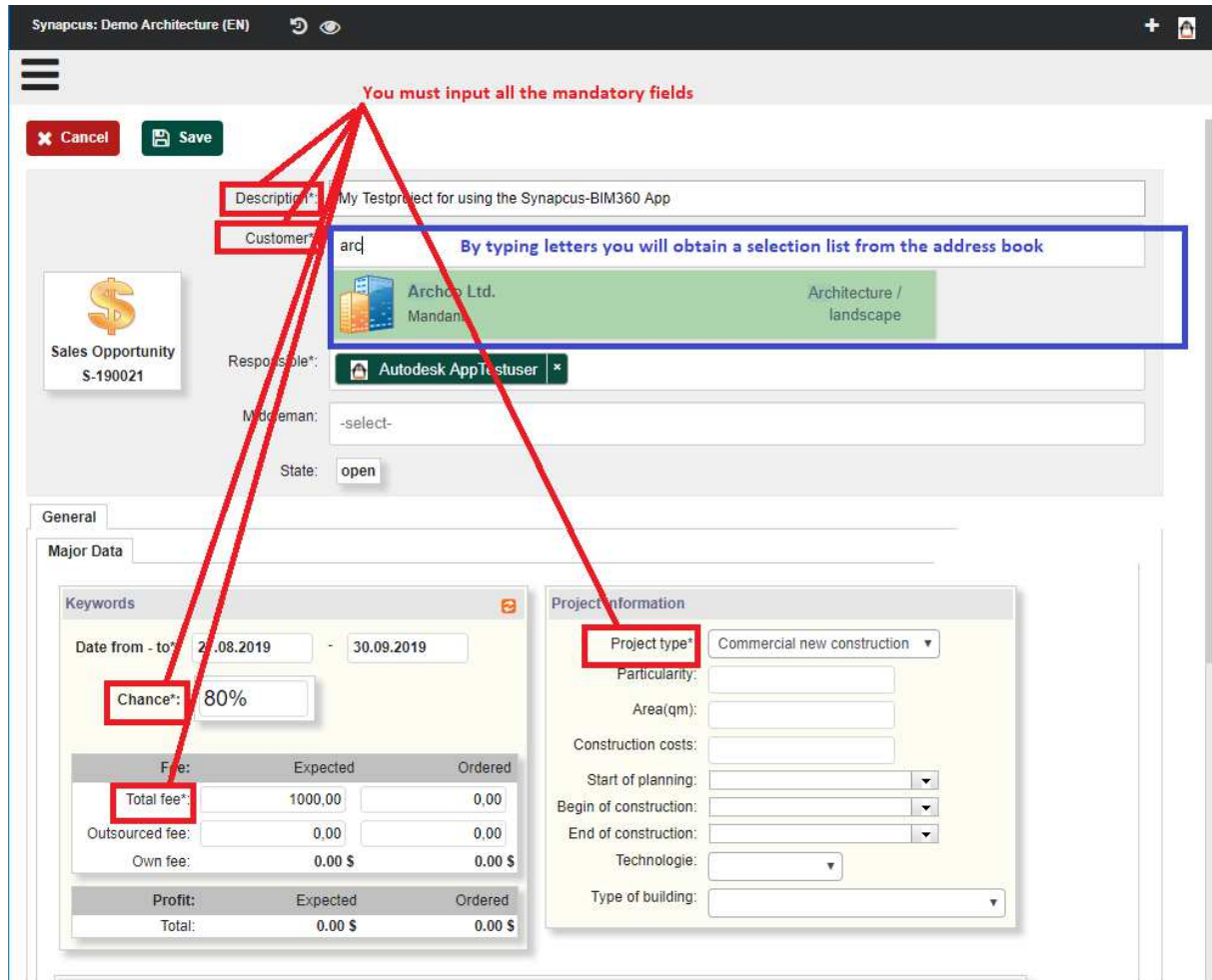
3. In the Synapcus upper toolbar use the **"+" button to create a new sale opportunity** (a sale opportunity is the predecessor of a project). Fill in all the mandatory fields (marked through an asterisk *) and save it.

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

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".

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").
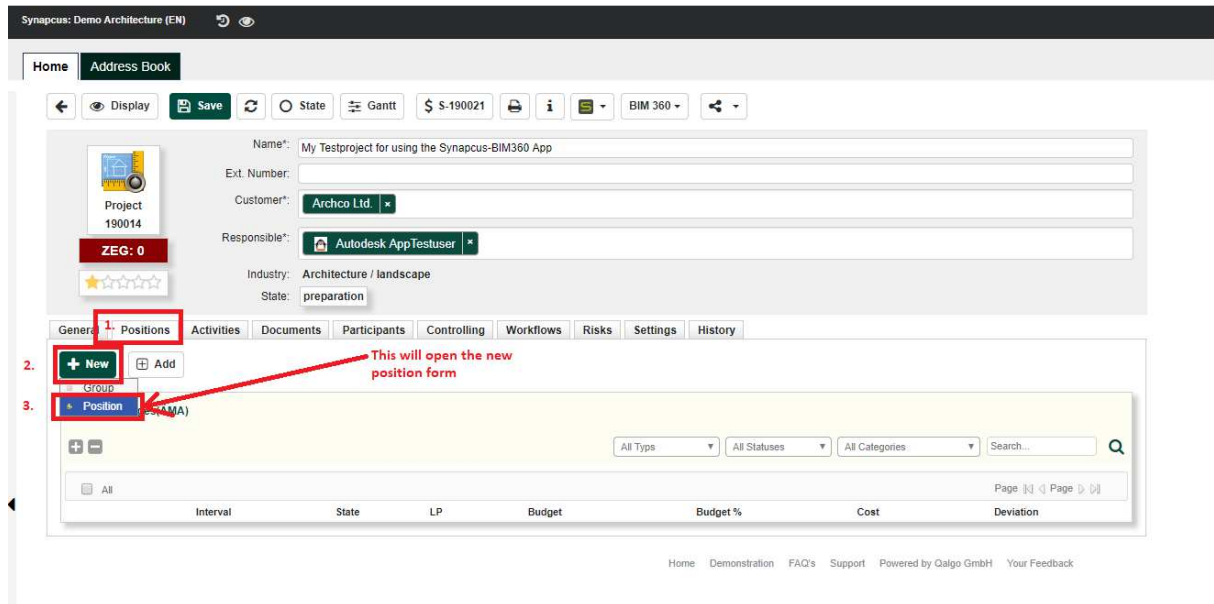
In the position form fill in the mandatory fields (mainly the position "Description") and save the document.
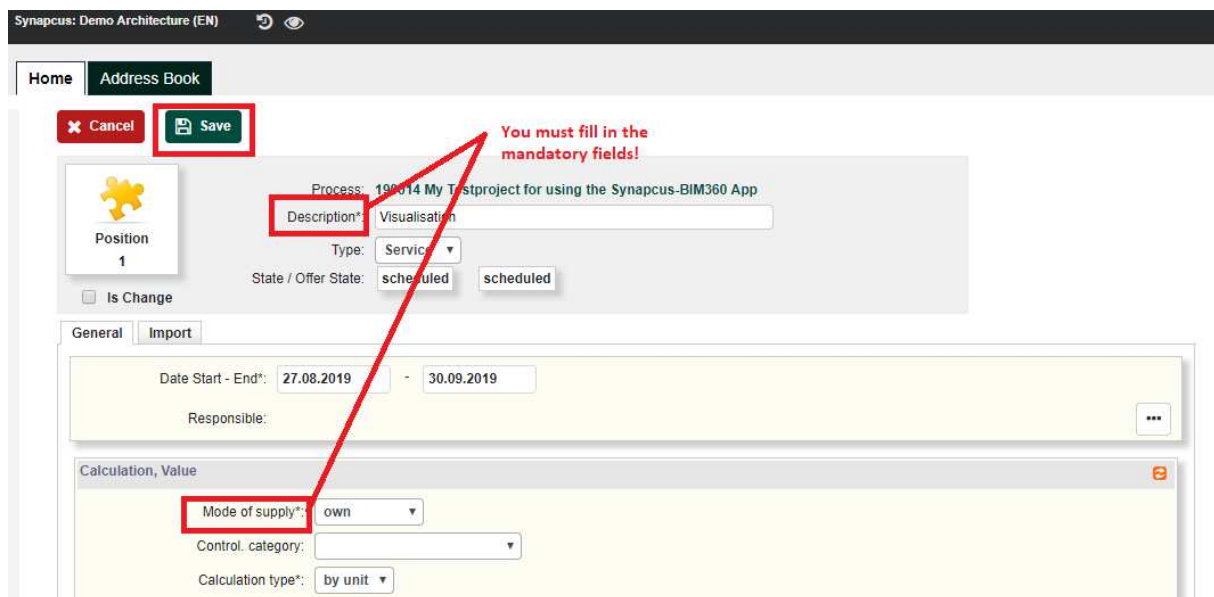
After saving the document, set the newly created position in the state **"on progress"**. Through that you assure that all the project participators can work on it – i.e. by creating and assigning activities (=issues) for this position.
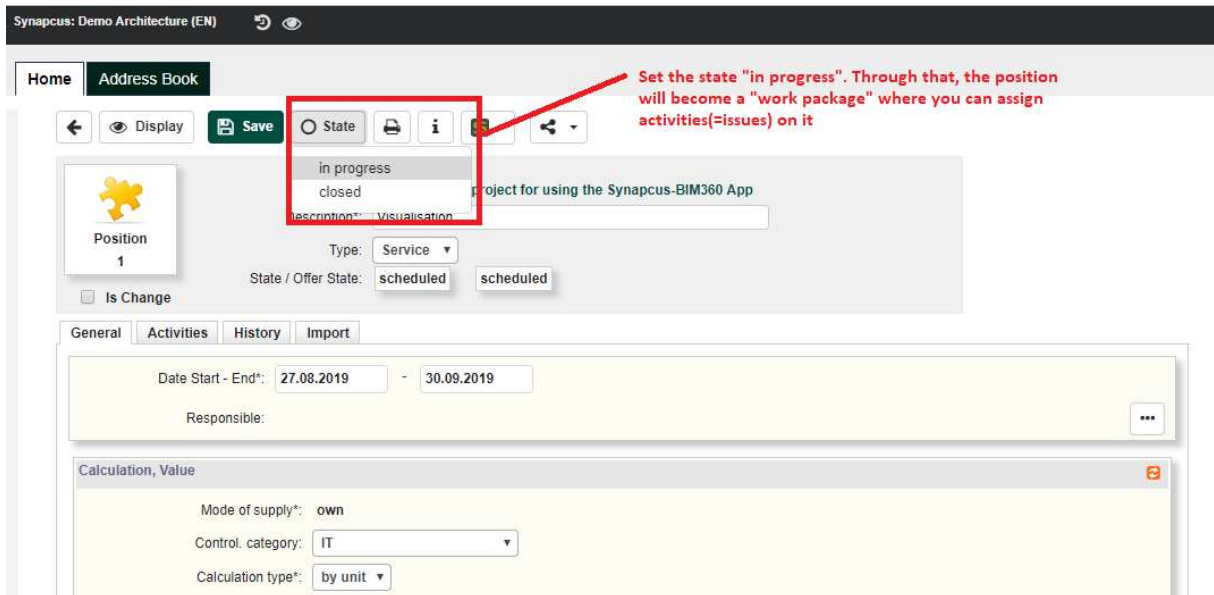
5. In the Synapcus project form, create a new participation
under **Project/Participations/Add-->Participation** (for you as a project participator).
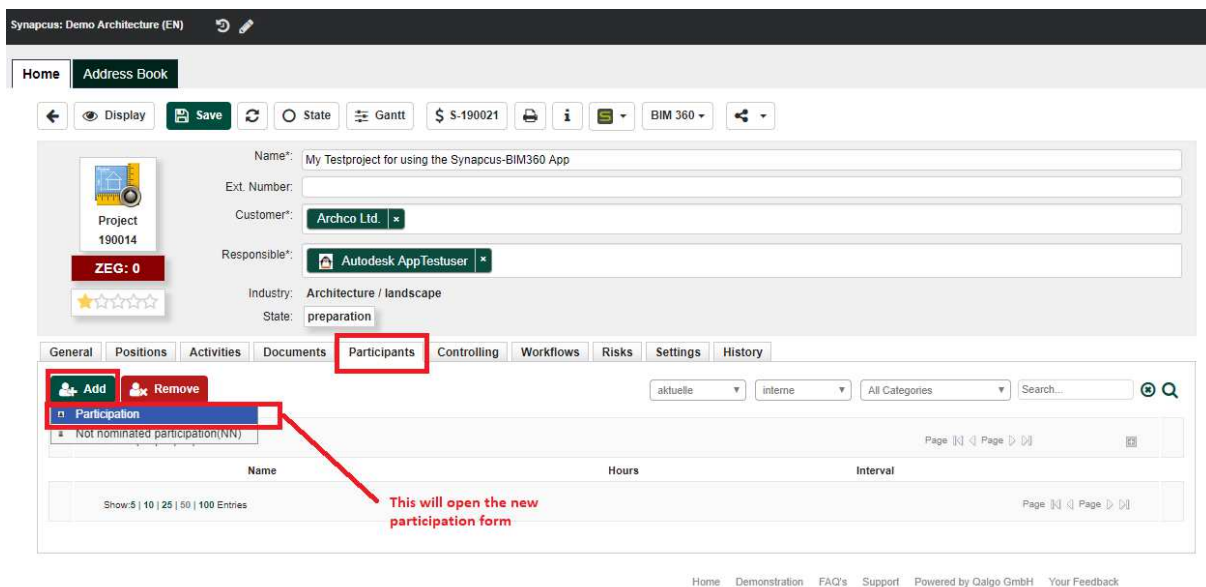
In the participation form choose yourself as a participator and fill in all the mandatory fields:

qalgo
Business Software Solutions

Person*: Autodesk AppTestuser ×

Beteiligung

Catalogue Services: Student IT (i.5)
Role/Handiwork*: PR.IT (IT)
Function: Project documentation (PD)
Special function: keine
Control. category: IT

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

General

Keywords

Date Start - end*: 27.08.2019 - 30.09.2019

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

Project contact data

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

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.

← Edit   ⇄ Gantt $ S-190014   🖨   i   S ▾   BIM 360 ▾   ⬦ ▾

→ Create BIM 360 project...

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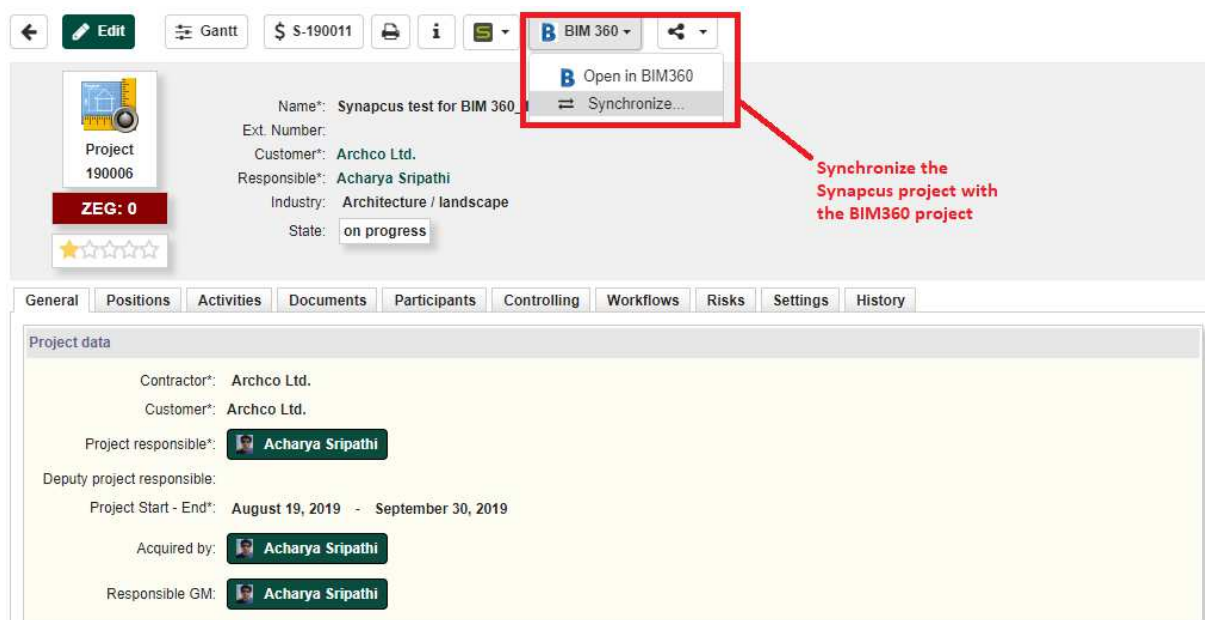
10. **To download/link a BIM 360 3D-model to Synapcus**, set the Synapcus project form to „Edit". In the tab section "Documents", please select the action **"Download from BIM 360 Cloud"**. This will pop up a dialog box with all your existing BIM 360 project folders and files. Here you can choose the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