

# Start to finish set up of Collaboration for Revit



Autodesk® A360 Collaboration for Revit® is a Cloud Subscription service that works with Revit® software to connect building project teams with centralized access to BIM project data in the cloud. Teams stay connected in real time using the Communicator chat tool within models. Integrated with Autodesk A360, Collaboration for Revit enables the entire project teams to work on shared building information models.



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# Overview:

## What is Collaboration for Revit?

Autodesk® A360 Collaboration for Revit® is a Cloud Subscription service that works with Revit® software to connect building project teams with centralized access to BIM project data in the cloud. Teams stay connected in real time using the Communicator chat tool within models. Integrated with Autodesk A360, Collaboration for Revit enables the entire project teams to work on shared building information models.

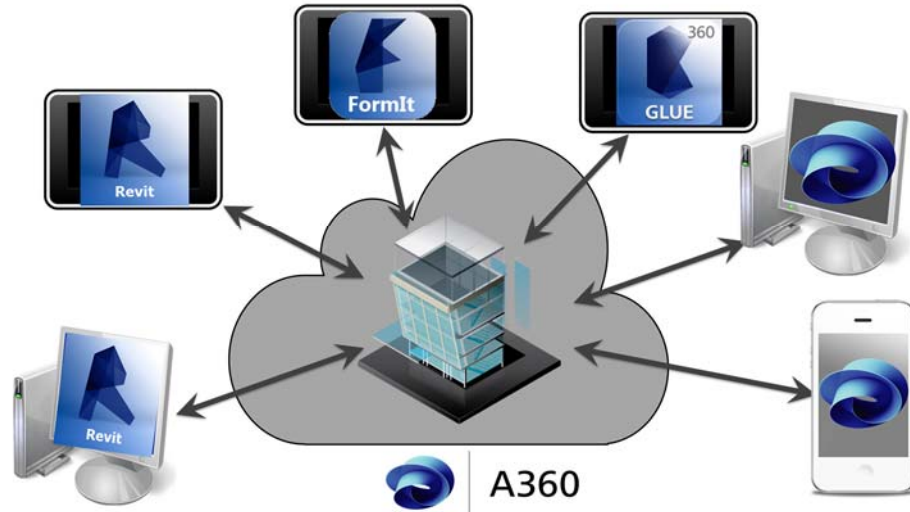
## Keys to success



- Familiarity with Revit worksharing—the C4R workflow builds on the worksharing capabilities of Revit
- Familiarity with managing user entitlements on Manage.Autodesk.Com (Autodesk Accounts) (<http://knowledge.autodesk.com/customer-service/account-management/subscription-management/users-permissions>)
- Familiarity with A360—and, in the best case, already have a corporate Hub set up and understand about how to set up projects and invite people into the Hub and the project

## What is Autodesk A360?

### Interact & Collaborate on BIM Data Across Platforms

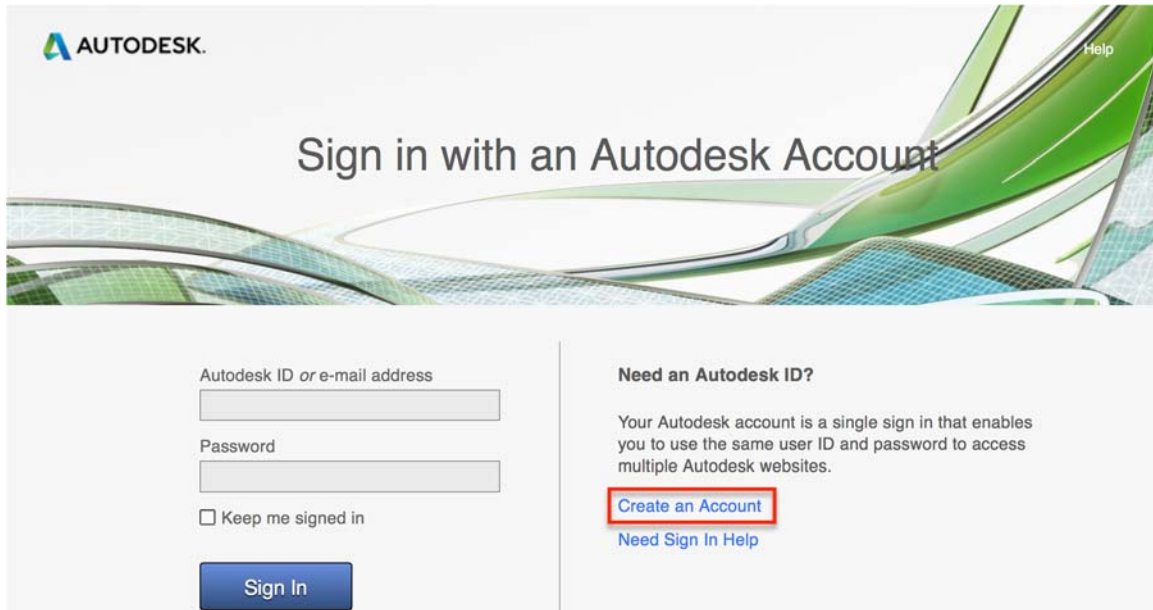


- Autodesk A360 is the umbrella term for all A360-related products.
- Autodesk A360 Team is a cloud-based collaboration platform that provides design and engineering teams a centralized place to work together more efficiently. A360 enables our customers to:
  - Share & work together—A central project-based view of all data and activity, accessible from almost any device, anywhere, by all stakeholders
  - View everything—A rich 3D visual experience enabling easy, fast, and detailed exploration of over 100 2D and 3D data formats
  - Find anything—Search deep within 3D design data and all other project content to find what you need, when you need it
- Autodesk A360 Team can be accessed through **Autodesk360.com**.
- Autodesk® A360 Drive (known as Autodesk 360 prior to Sept 3, 2014) is a cloud file storage service that comes with maintenance and desktop subscriptions for select Autodesk desktop software (most suites and major desktop products).
- A360 Drive offers a specific set of features designed to support cloud storage of design information. For example, it enables you to synch Autodesk® AutoCAD® or Revit models to the cloud. A360 Drive is also the mechanism by which you access Autodesk cloud rendering services.
- A360 Drive and A360 Team complement each other. If you have A360 Team, you can access your A360 Drive storage data from within the A360 Team user interface. You also have the ability to copy data from A360 Drive into A360 Team projects.
- Trying or purchasing A360 Team does not affect your A360 Drive account. For example, if you purchase Autodesk® Building Design Suite (BDS), you receive 25 GB of storage through A360 Drive, whether or not you also use A360 Team.
- Your A360 Drive can be accessed from **360.autodesk.com**.

# Getting started

## Sign up for an Autodesk ID.

- [Accounts.autodesk.com/register](https://accounts.autodesk.com/register) or [Autodesk360.com](https://Autodesk360.com)

The image shows the Autodesk login page. At the top left is the Autodesk logo. The main heading is "Sign in with an Autodesk Account". Below this, there are two input fields: "Autodesk ID or e-mail address" and "Password". There is a checkbox labeled "Keep me signed in" and a blue "Sign In" button. To the right of the login fields, there is a section titled "Need an Autodesk ID?". It contains a paragraph explaining that an Autodesk account is a single sign-in that enables users to use the same user ID and password to access multiple Autodesk websites. Below this paragraph, there is a red-bordered button labeled "Create an Account" and a blue link labeled "Need Sign In Help".

## Install Collaboration for Revit .

(<http://knowledge.autodesk.com/support/revit-products/downloads/caas/downloads/content/autodesk-a360-collaboration-for-revit-2015.html>)

- **NOTE:** You will need to make sure the latest update release for 2015 is installed. You can do that through the Autodesk App Manager.

## Once Collaboration for Revit is installed, you'll need to set up an A360 Team Hub. There are three ways to set up an A360 Team Hub.

The most common question is how to set up a trial Hub. To do that, go to [Autodesk360.com](https://Autodesk360.com) and hit "Try Now."

This will create an A360 Team Hub. The Hub name will use the following convention:

**<email domain><next number in line for that email domain>.Autodesk360.com**

For example, Joe@acme.com will create a hub called acme.autodesk360.com. If a second user from acme starts a trial, it will be called acme1.autodesk360.com , and so forth.

- **NOTE:** Hub names cannot be renamed once created.



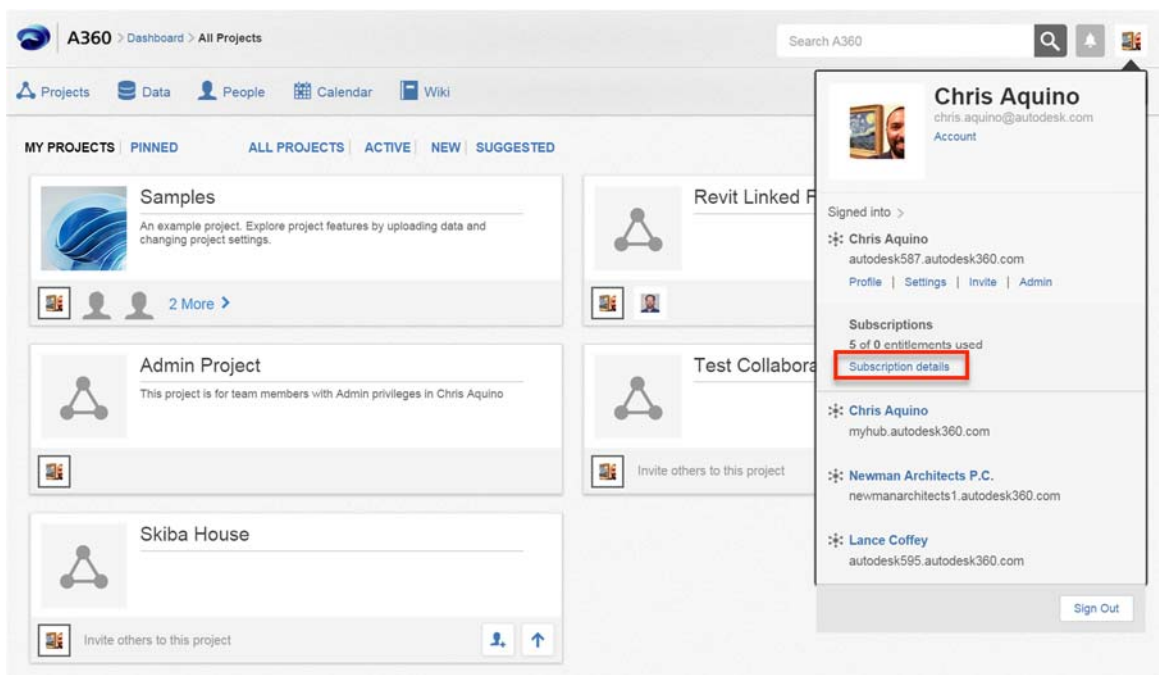
At this point, you will have a 33-day trial of A360 Team. During this time, you will have full functionality in A360 Team and Collaboration for Revit. As A360 trial sites wind down, you will have a choice of either converting your trial site into a *free* site or a *paid* site, or doing nothing.

For those that want to go the free or paid option, the links in the site show how to do that.

For those that choose to do nothing, the trial site will be deactivated through the following process:

- The trial period is 33 days. During this time, the user will have full Autodesk A360 functionality.
- After day 33, the site will go into a “deactivated” state for 30 more days.
- After day 64 (initial 33 day trial period + 30 days in deactivated state) it will be officially deleted.
- While the hub is in the deactivated state (days 34-64), users will be able to access and download any of the data files that remain in the site.
- During this time, the site admin/owner will not be able to upload any new data, add any new users, or share any existing data with existing users.
- If you had a trial site that expired and was deleted (as of day 64), only then, can you create another new A360 trial site.
- Please note: Even if a trial site is either currently “deactivated” or has been “deleted,” this does *not* prohibit you from being invited into another currently active A360 site.

Also, if you have an A360 Team trial and used it to access your A360 Drive account (from A360 Team), your A360 Drive site will still remain intact, active, and accessible after the A360 Team trial is deactivated/deleted.



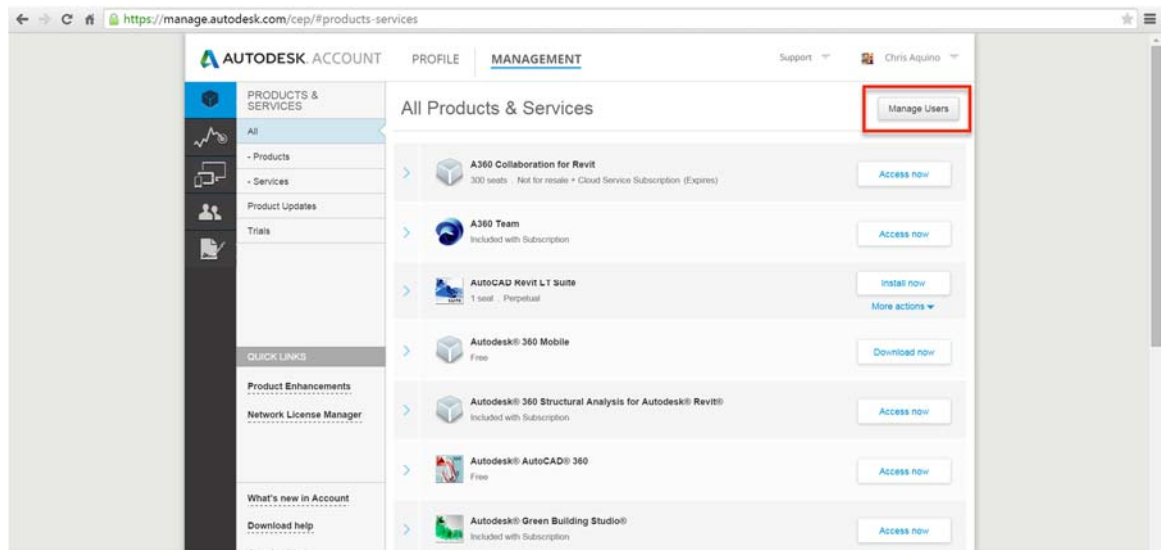
The other ways users will have access to set up an A360 Team Hub is either through purchasing A360 Team directly, purchasing Collaboration for Revit, which includes a Subscription to A360 Team, or getting a free one month trial by using the “hidden url.”

- **NOTE:** At this time, Collaboration for Revit is limited to North America for performance reasons. We are planning to have global access in the future, but not before we can ensure reasonable performance outside of North America. The one exception is that only the person who purchases the Subscription to C4R has to be based in North America. Users who are outside of North America can be assigned permissions to C4R by the contract manager (or software coordinator).



**Once the software is purchased, the contract manager will need to assign permission through the User Management function in Autodesk Accounts.**

- **NOTE:** By default, the first seat in any contract is always assigned to the contract manager. Therefore, if you purchase 1 seat, the CM may see that they have no seats to assign. This is because it's assigned to them.



If you do not see the users you want to assign permissions to in User Management, you can add them by hitting Add.

**NOTE:** This applies to users both inside and outside of the company.

The screenshot shows the Autodesk Account User Management interface. The left sidebar contains navigation options like 'What's new in Account'. The main content area displays a table of users with their email addresses, product access, and status. A red box highlights the 'Edit Access' button for the 'AU Class User'.

Email	Products & Services	Benefits	Status	Edit Access
alan.gunn@autodesk.com	2	2	✓	Edit Access
Alexandra Dodge alexandra.dodge@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Amy Fietkau amy.fietkau@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Amy Yang ahong.yang@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Andrew Wood andrew.wood@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Andrzej Samsonowicz andrzej.samsonowicz@autodesk.com	Products & Services 1	Benefits 1	✓	Edit Access
Angela Chan echan@gehrlytech.com	Products & Services 1	Benefits 2	✓	Edit Access
Aniruddha Deodhar aniruddha.deodhar@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Anna Oscarson anna.oscarson@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Answer Bar 1 au_answerbar_1@sttest.net	Products & Services 1	Benefits 1	✓	Edit Access
Answer Bar 2 au_answerbar_2@sttest.net	Products & Services 1	Benefits 1	✓	Edit Access
Answer Bar 3 au_answerbar_3@sttest.net	Products & Services 1	Benefits 1	✓	Edit Access
Answer Bar 4 au_answerbar_4@sttest.net	Products & Services 1	Benefits 1	✓	Edit Access
Anthony Hauck anthony.hauck@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
Armundo Darling armundo.darling@autodesk.com	Products & Services 1	Benefits 2	✓	Edit Access
AU Class User autoclassuser@sttest.net	Products & Services 0	Benefits 2	✓	Edit Access
Barry Tsai	Products & Services	Benefits	Status	Edit Access

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If the user is on the list, hit “Edit Access”

The screenshot shows the Autodesk Account Management interface. On the left sidebar, the 'Manage Users' link is highlighted with a red box and labeled '1'. In the main content area, the 'All Users (181)' section has a '+ Add' button highlighted with a red box and labeled '2'. A red arrow points from this button to the 'Add Users' dialog box. The dialog box has a 'User Info' section with fields for 'Email', 'First Name', and 'Last Name', which are collectively highlighted with a red box and labeled '3'. At the bottom of the dialog, the 'Save & Continue' button is highlighted with a red box and labeled '4'. The background shows a table of users with columns for 'Products & Services', 'Benefits', 'Status', and 'Edit Access'.

The screenshot shows the 'Edit Access' dialog box for an 'AU Class User'. The dialog has tabs for 'All', 'Benefits', and 'Products & Services'. The 'Benefits' tab is active, showing a list of benefits including 'Product Downloads (All Products)', 'Product Extensions & Web Support', and 'Autodesk A360 Collaboration for Revit'. Each benefit has an 'Assign' button. The 'Products & Services' tab is also visible, showing a list of products and services with 'Assign' buttons. The dialog includes 'Save' and 'Cancel' buttons at the bottom.

**Please note:** Every user who gets A360 access will have the power to set up a hub, so for every seat, a company could have that many A360 Team Hubs. To avoid this, we recommend that the contract manager set up the first Hub (companyname.autodesk360.com), and then does not check the A360 Team box for any other users.

- **NOTE:** To revoke permissions, uncheck the boxes. To remove a user from the list of managed users, hit the grey x to the right of their name.

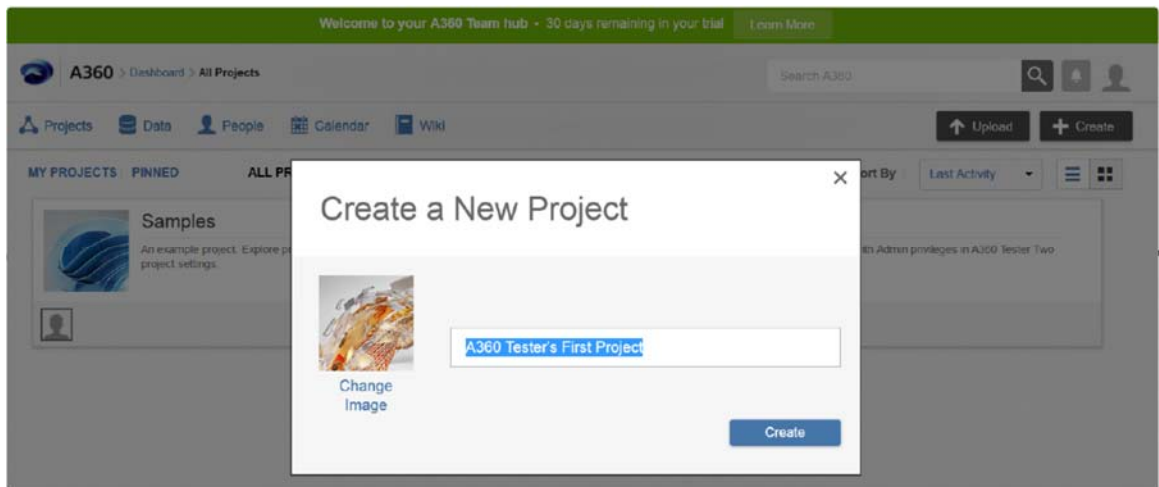
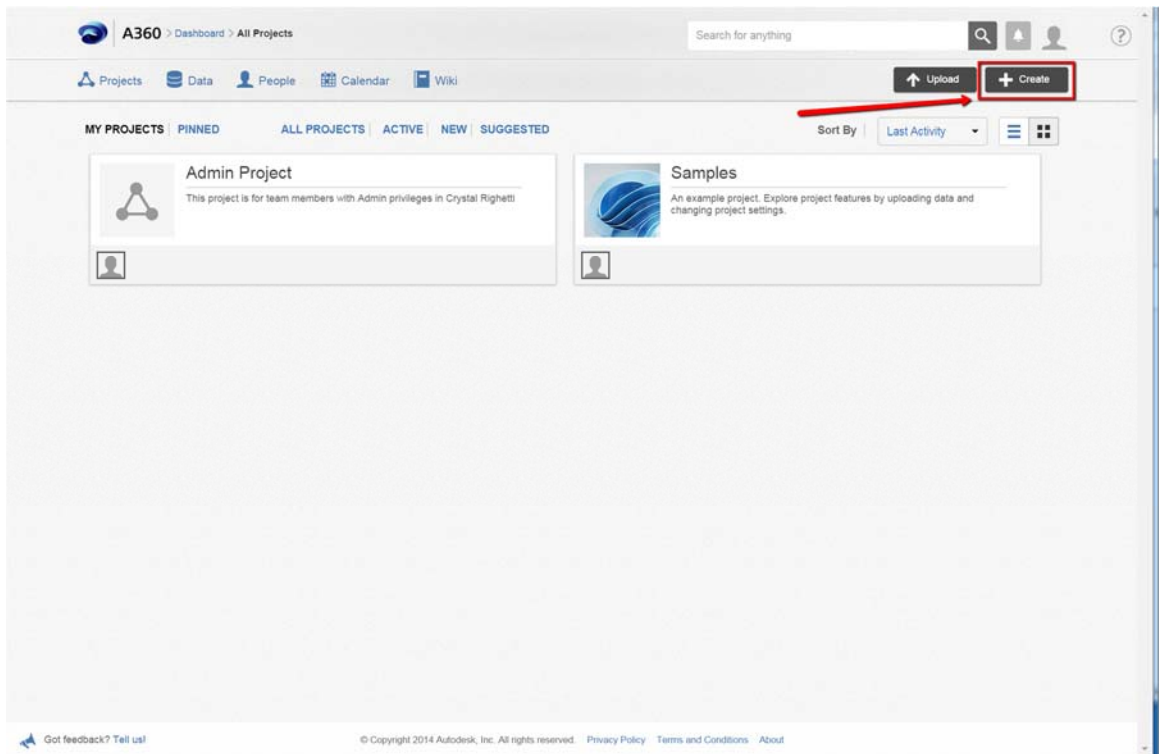
<input type="checkbox"/>	>	<b>Andrew Wood</b> andrew.wood@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Andrzej Samsonowicz</b> andrzej.samsonowicz@autodesk.com	Products & Services 1	Benefits 1	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Angela Chan</b> achan@gehrytech.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Aniruddha Deodhar</b> aniruddha.deodhar@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Anna Oscarson</b> anna.oscarson@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Answer Bar 1</b> au_answerbar_1@sstest.net	Products & Services 1	Benefits 1	Status ⋮	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Answer Bar 2</b> au_answerbar_2@sstest.net	Products & Services 1	Benefits 1	Status ⋮	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Answer Bar 3</b> au_answerbar_3@sstest.net	Products & Services 1	Benefits 1	Status ⋮	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Answer Bar 4</b> au_answerbar_4@sstest.net	Products & Services 1	Benefits 1	Status ⋮	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Anthony Hauck</b> anthony.hauck@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Armundo Darling</b> armundo.darling@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>AU Class User</b> auclassusers@sstest.net	Products & Services 0	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Barry Tsai</b> barry.tsai@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Ben Thompson</b> ben.thompson@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Benno Toorn</b> benno.toorn@cadcompany.nl	Products & Services 1	Benefits 1	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>
<input type="checkbox"/>	>	<b>Bill Glennie</b> bill.glennie@autodesk.com	Products & Services 1	Benefits 2	Status ✓	<a href="#">Edit Access</a>	<input type="checkbox"/>

Are you sure you'd like to remove this user?

[Cancel](#) [Remove](#)

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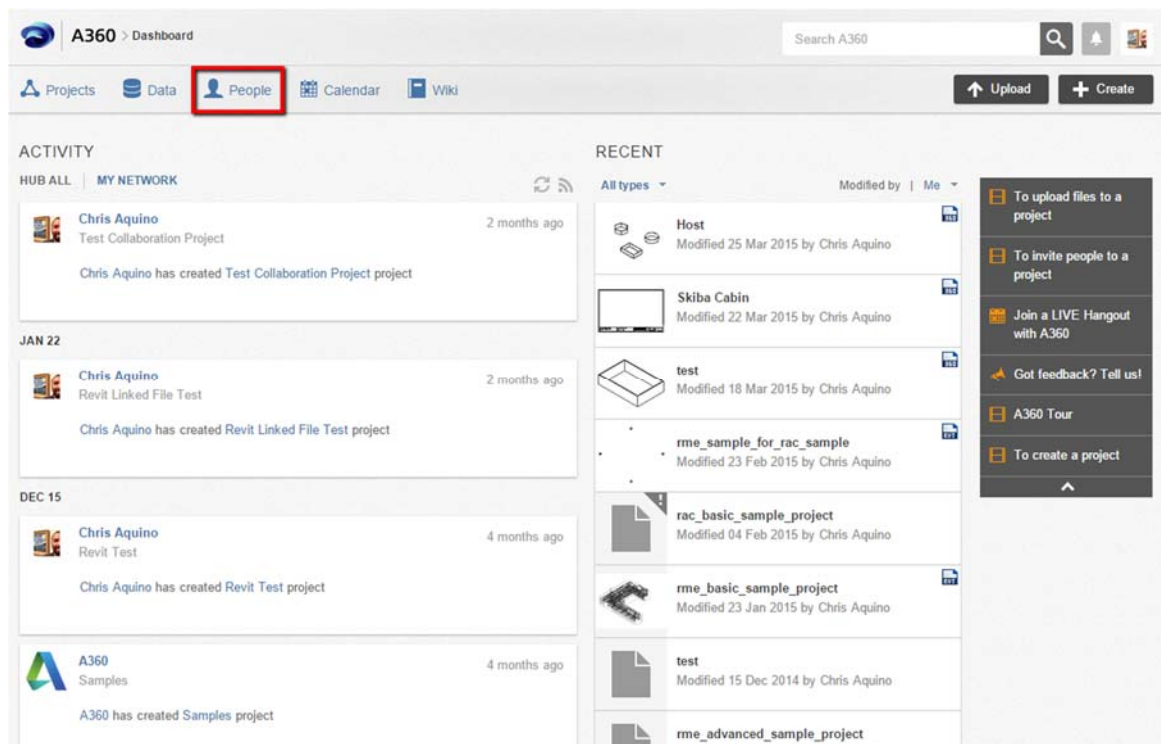
**Once a hub is set up, it's time to create a new project, since the sample and admin do not show up in C4R.**



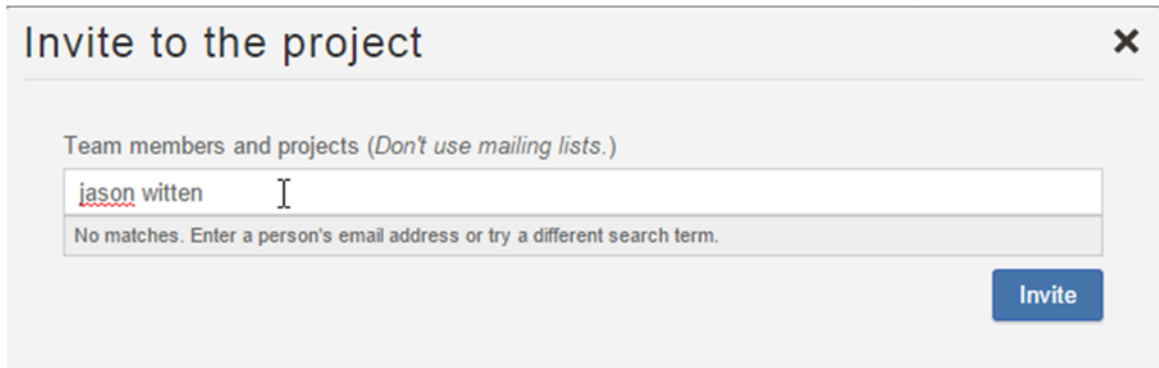
## Once you have a project set up, you will need to invite people.

Some info about project types:

- **Open:** Use for projects where the intent is to share information broadly to everyone. All Open project information is searchable and accessible to all members of the organization. Anyone in the organization can join and leave an Open project at any time. People outside the organization are not allowed to be invited to Open projects.
- **Closed:** Use for projects that require some privacy. Anyone in the organization can see the Closed project name in search results, as well as the Closed project Profile and People pages. All items in the Closed project shared with the entire hub (Hub All) are also visible. Only members of the Closed project can search for and access the project page, activities, and content. The Closed project's moderator must approve membership requests. An organization's hub settings determine if people outside the organization can be invited to join Closed projects.
- **Secret:** Use for personal projects or projects that require extra privacy. Secret projects are hidden from people who weren't invited to the project. Only existing project members of a Secret project can search for and access the project page, activities, and content. Team administrators can't view content inside Secret projects. Membership to a Secret project is by invitation only. If you are using the paid version, A360 Team, the hub settings determine if people outside the organization can be invited to join Secret projects.



Or you can invite them to an individual project. If they are not already members of the hub (for example, someone in another office), you will need to use their email address.



Invite to the project

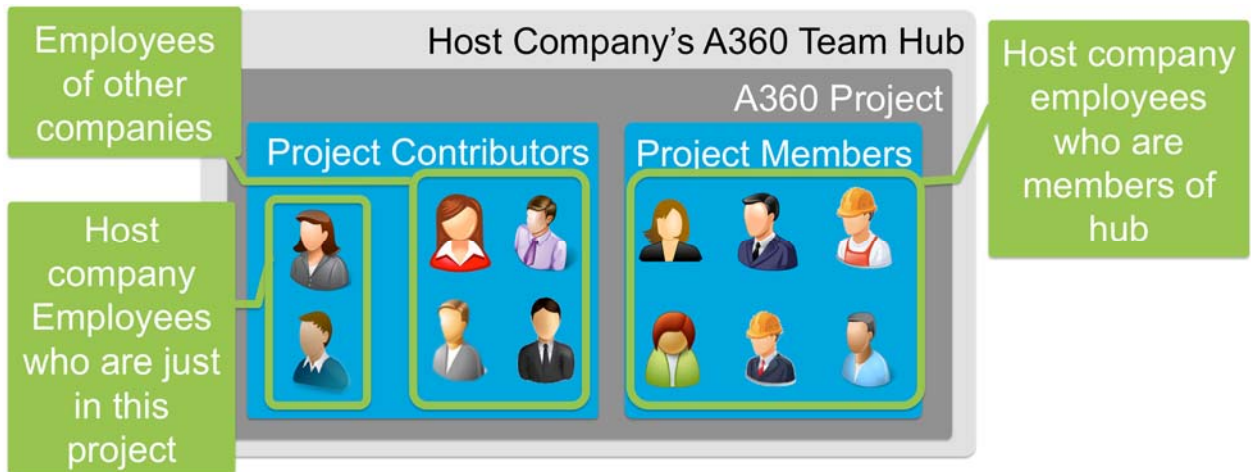
Team members and projects (Don't use mailing lists.)

jason witten

No matches. Enter a person's email address or try a different search term.

Invite

#### Overview of the user Roles:



There are paid roles, and free roles.

All Team roles are paid, and there are paid and free Project roles.

The Paid Roles:

##### Team Owner:

- The person who owns/purchases the license entitlement for the hub
- Is also a Team Administrator and Team Member, and can designate/invite other Team Members, Team Administrators, or Project Moderators
- Can purchase additional Team Member subscriptions
- Can invite Project Contributors, and can enable others to do so



**Team Administrator:**

- Can configure whether or not Team Member signup requires Team Administrator approval and whether Team Members can invite Project Contributors from outside the company (via Sign-up Mode)
- Can invite/deactivate Team Members and Project Contributors
- Can promote a Team Member to a Team Administrator
- Can edit Team member profile information
- Can convert Team Members to Project Contributors and vice versa
- Can create/deactivate/activate all projects
- Can change Project Moderators and Project Owners of all projects (including Secret projects). However, one has to be a Project Moderator first before becoming Project Owner of a Secret project
- Can view list of all projects and delete/move/copy content within them
- **Cannot** view content in Secret projects. Can only see that Secret projects exist and deactivate them (via the Admin.>Project>Manage page)

**Team Member:**

- Can browse all projects (except Secret ones) and can create projects
- Can see all other Team Member profiles
- Can invite other Team Members if allowed by Team Administrator
- Can join any Open or request to join any Closed project in the hub
- Can join Secret projects by invitation only
- Can view all content in the hub (in Open projects, or with Hub All)
- Can delete/move/copy project content they are members of

Project Roles – Paid

**Project Owner:**

- Must be a Team Member to be a Project Owner
- The Team Member creating a project by default is the Project Owner
- Is also a Project Moderator and can designate other Team Members as Project Moderators to their project(s)
- Can invite Project Contributors (if “Sign-up” Mode **not** restricted by Team Administrator)
- Can delete/move/copy project content

**Project Moderator:**

- Must be a Team Member to be a Project Moderator
- Can invite Project Contributors if allowed by Team Administrator
- Can update project profile page including project logo
- Can approve/reject invitations made by other Project Contributors and project members (closed and secret groups)
- Can designate other Team Members to be Project Moderators
- Can delete/move/copy their project content



## Project Roles - Free

### Project Contributors:

- Someone invited to a project, typically **outside** your organization
- Can access only the project(s) to which they're invited
- Can invite other Project Contributors, but invitation **always** requires Moderator approval
- Can delete/move/copy content in projects they're invited to
- **Cannot** see other projects in the hub nor team members except in those project(s) they're invited to
- **Cannot** be made a Project Moderator
- **Cannot** be invited to Open projects

If you are invited to another hub, you will need to specify your default hub.

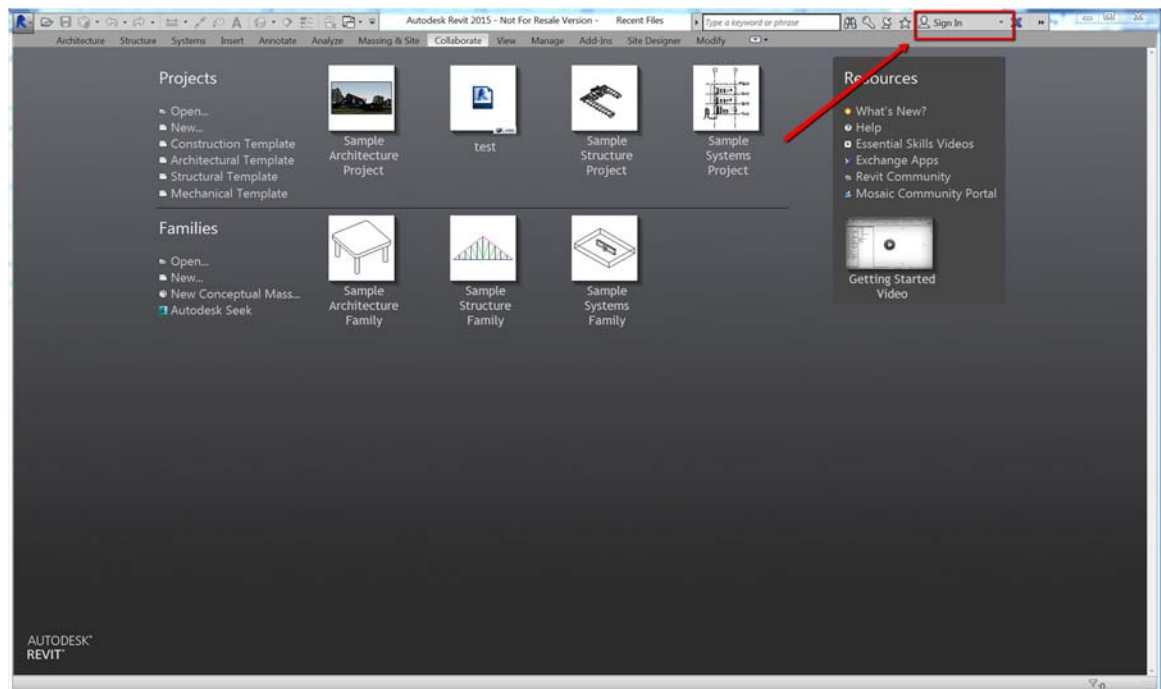
The screenshot shows the Autodesk A360 Settings page. The 'SET DEFAULT HUB' section contains a table with the following data:

	Name	Url	User Type
3	Chris Aquino	https://autodesk587.autodesk360.com	Admin
	Chris Aquino	https://myhub.autodesk360.com/ue29c6312	Admin
	Newman Architects P.C.	https://newmanarchitects1.autodesk360.com	User
	Lance Coffey	https://autodesk595.autodesk360.com	Guest

Below the table are buttons for 'Set As Default' and 'Cancel'. The 'LOCALIZATION' section shows the current time zone as 'Coordinated Universal Time (UTC)' with a 'Change' link, and 'Save' and 'Cancel' buttons.

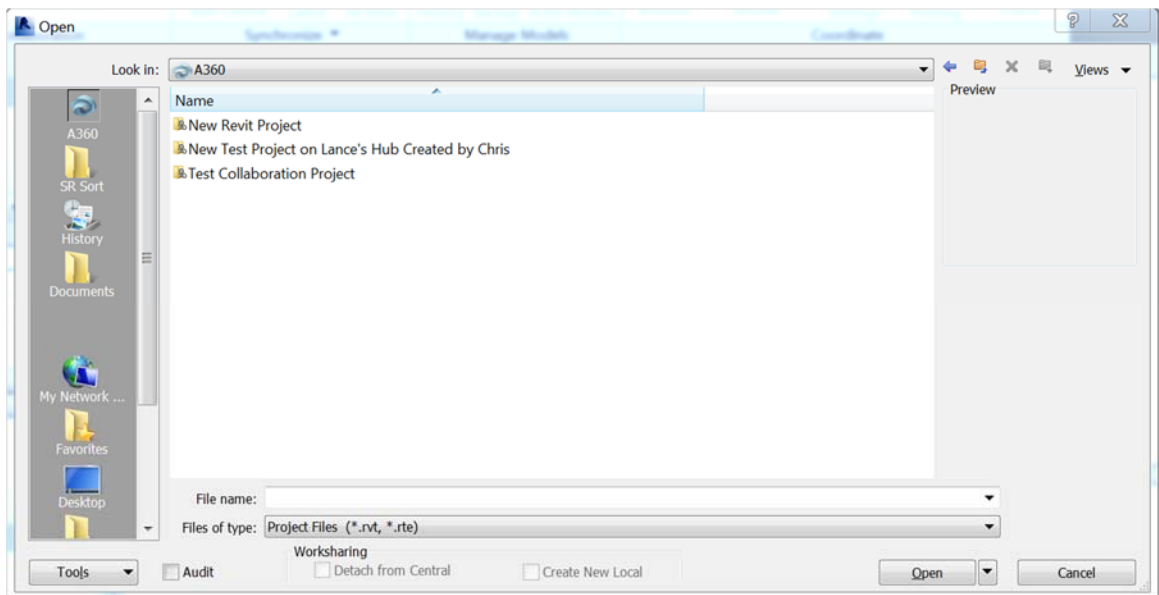
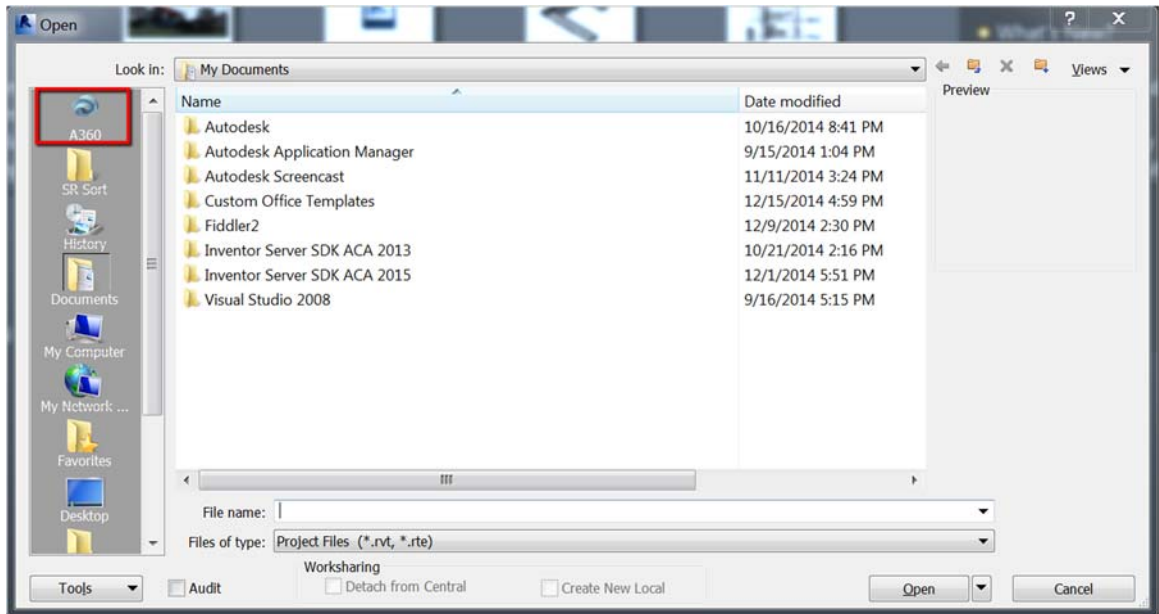
The user profile dropdown menu on the right shows the user 'Chris Aquino' with a 'Settings' link highlighted by a red box labeled '2'. The user profile icon in the top right corner is highlighted by a red box labeled '1'.

**Once a project is set up and people have been invited, launch Revit and sign in to A360**

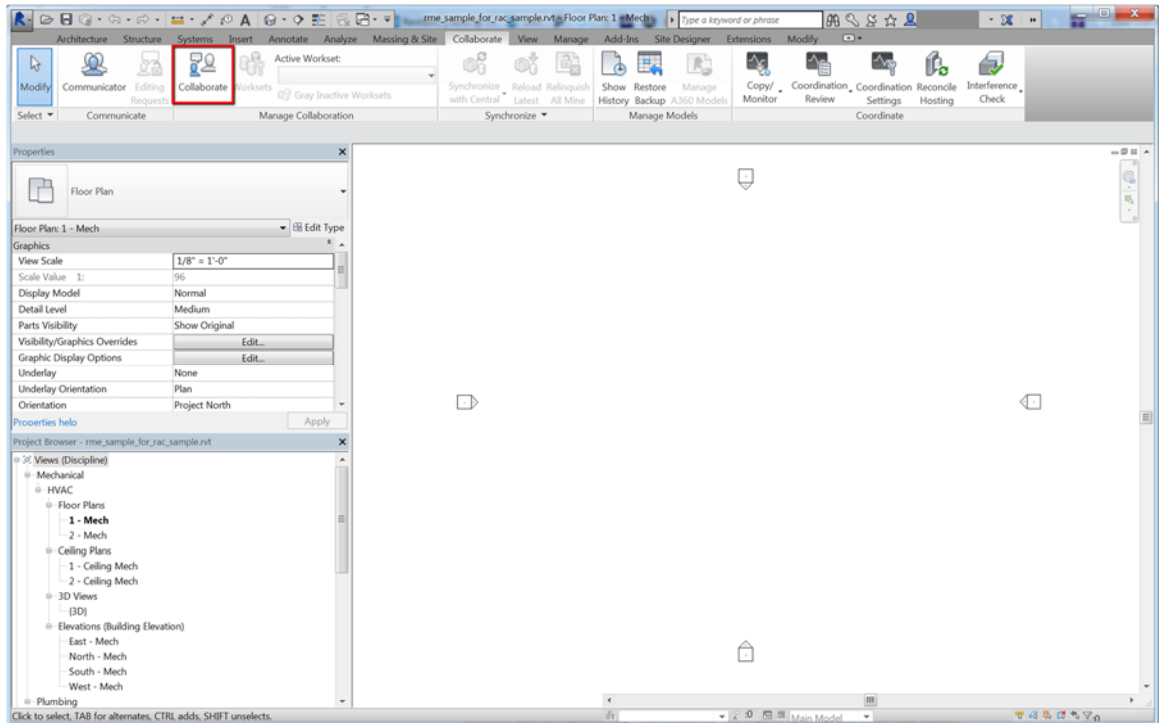


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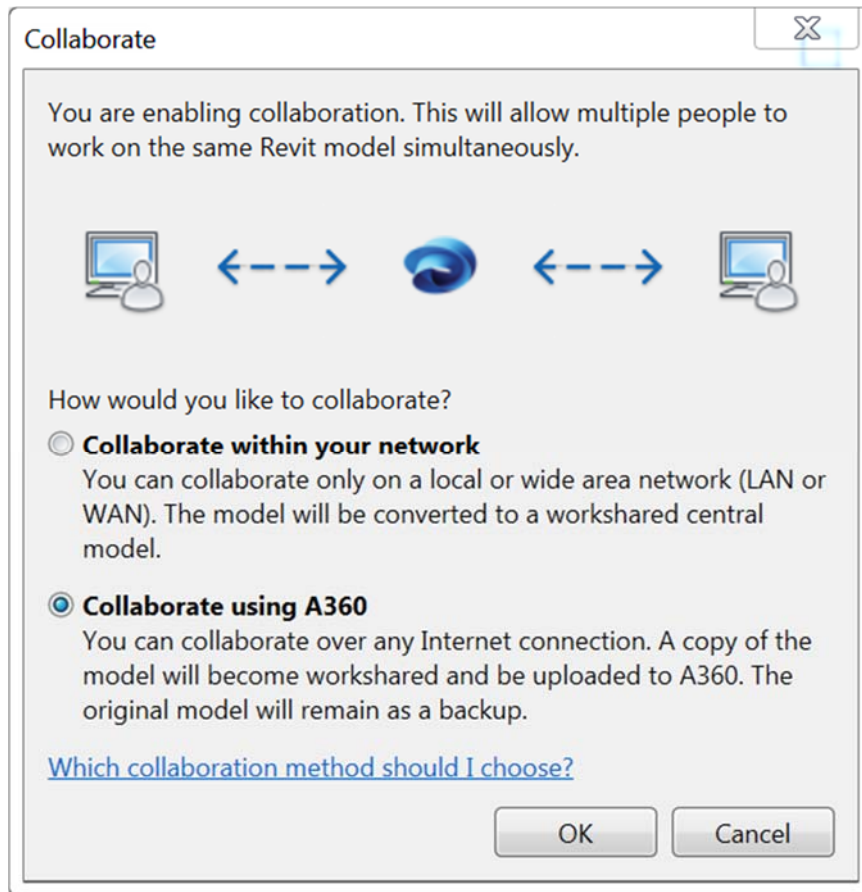
**Once signed in, you can access A360 Collaboration for Revit by going to *Application Menu > Open > A360***



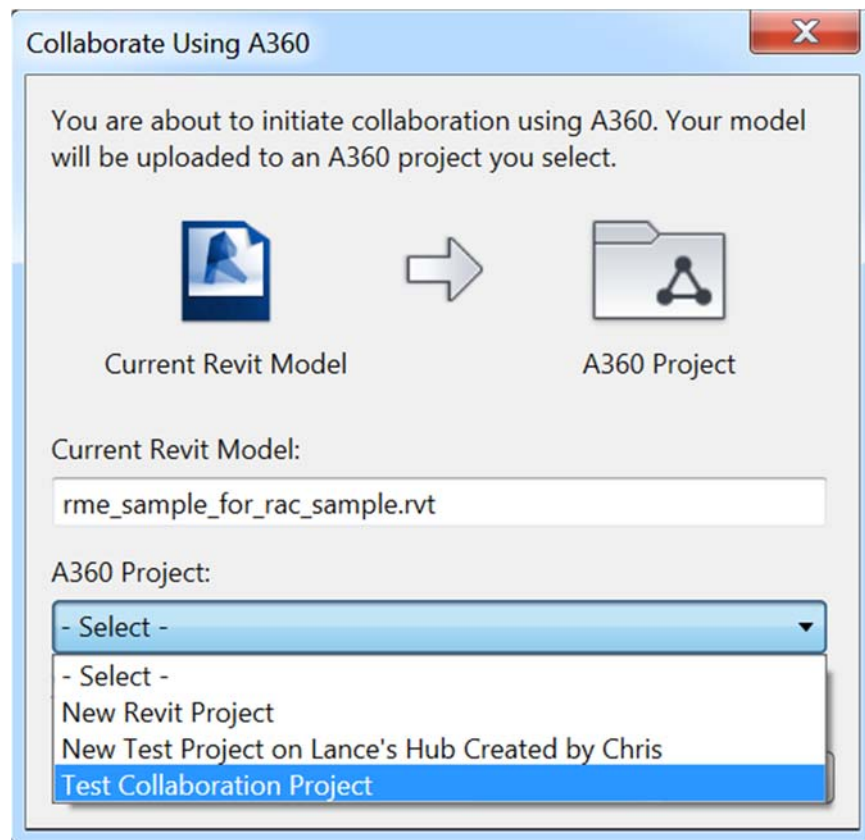
To save a project to A360 for use in Revit, you will need to create or open a Revit file, and go to **Collaborate > Manage Collaboration > Collaborate**



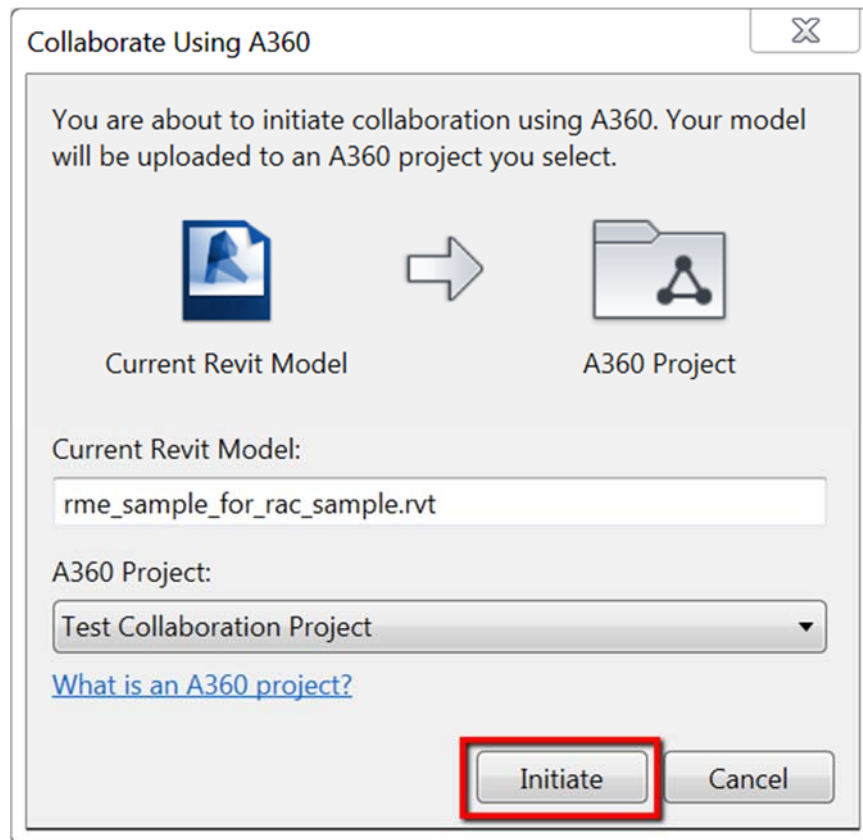
## Select Collaborate using A360.



## Select the project on A360 Team you want to use.



## Hit “Initiate.”





## You should see this as Revit uploads the file:

