



Manual

BIM Guide
installation and configuration



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BIM Guide is a platform created to manage the work of designers within the Autodesk Revit environment. Its main functionality is the ability to monitor and block functions used by users in Revit via a web application. This guide will describe step by step how to launch BIM Guide in your organization and how to configure its standards.

Installation

The core of BIM Guide is a web application where your organization's workspace is created. This is where all standards are set, and users and projects are managed. However, the platform will not collect any data until a dedicated Revit plugin is installed on users' computers. Only this combination will provide full platform functionality. Below are the steps you need to follow to start organizing your models.

Step 1: Launching the BIM Guide Platform

To launch BIM Guide for your organization, you need to register your workspace following the steps below:

1. Visit www.bimguide.com and click the "Start Trial" button in the upper right corner.
2. Click the "Register now" button.
3. Then fill in the registration details, assign a name for your workspace, and verify the registration with the code sent to your phone number.
4. Your workspace has been created, and you can now log in!

Step 2: Downloading and Updates

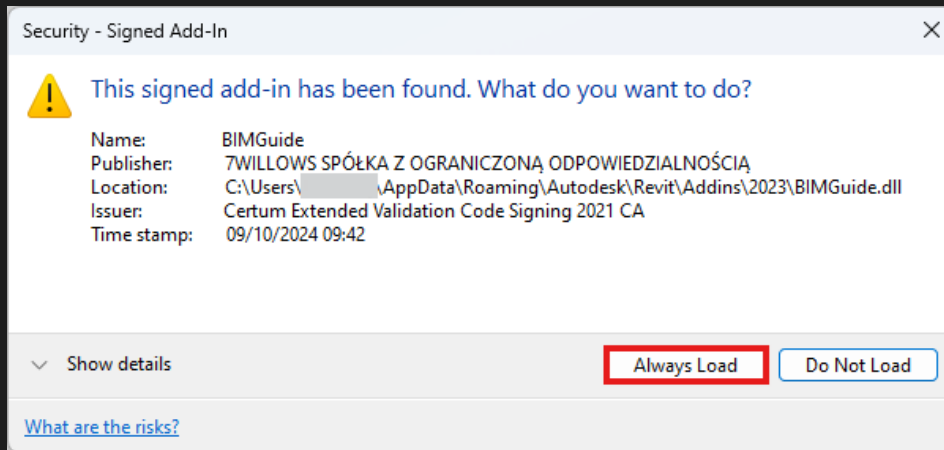
After logging into the newly created workspace, download the plugin version tailored to your organization. Simply click "Download" after clicking your profile icon in the upper right corner of the website. All future updates will be available in the same way, and you will be notified about them via email.

You can check the list of plugin versions installed on users' computers through the BIM Guide portal at www.<workspacename>.bimguide.com/app#administration. Updating the plugin to the latest version is, and always will be, free.

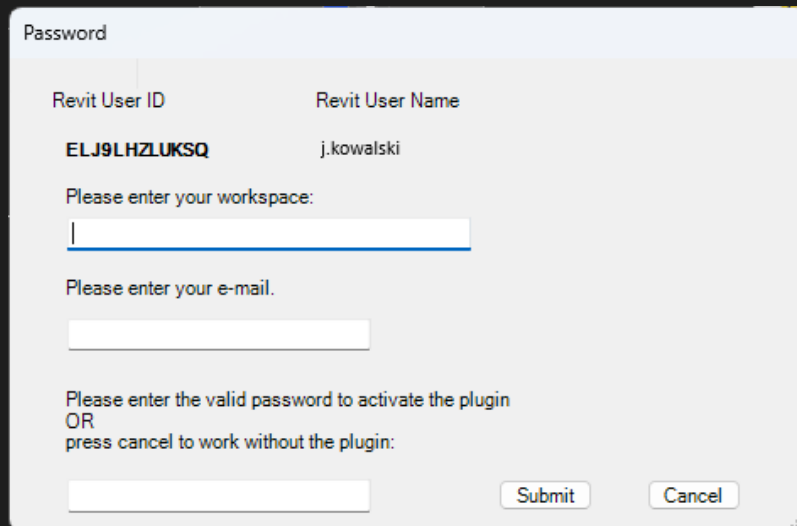
BIM Guide is continuously being developed for the three latest yearly versions of Autodesk Revit. Earlier versions will still be supported by the portal but will not be updated with new features. Currently, BIM Guide supports Autodesk Revit versions for 2021 - 2025.

Step 3: Installation and Launch

1. To install the plugin download and launch the installation wizard. Then pick Revit version that you wish to install BIM Guide on. The files will be automatically placed in a proper location.
If you plan to install the plugin on a large number of computers simultaneously (more than 20), we suggest contacting 7willows. We will be able to assist in automating this process so that you don't need to install BIM Guide on each computer individually.
2. Upon the next Revit launch, you will be asked whether you want to load the BIM Guide plugin. Confirm the loading by clicking "Always Load."



3. Then, when you launch Revit with the plugin loaded for the first time, a BIM Guide login window will appear. Enter your workspace name, login and password for the account that was previously set up by the user on the platform.



BE CAREFUL: In the workspace name field please enter only the part of the name highlighted here: www.<workspacename>.bimguide.com.

4. At this point, you will be logged into the plugin, and you can begin designing in Revit. BIM Guide operates in the background, so the user will not see any sign of the program running. The only indication of its operation will be notifications that appear when an action is attempted that is prohibited by the settings in the company's workspace on the www.bimguide.com portal.

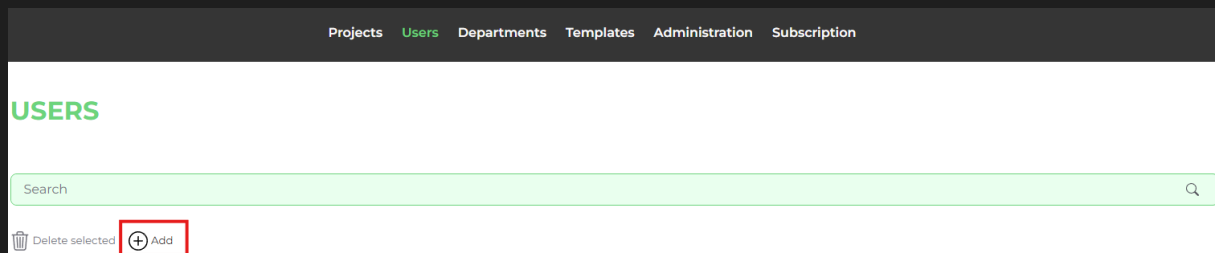
User Guide

Alongside installing BIM Guide on users' computers, their accounts also need to be configured on the web portal. These tasks should be carried out by the Administrator (most often, this will be your company's BIM Manager). Additionally, it will be necessary to create projects and departments. All these tasks are explained in this chapter.

Creating User Accounts

At the very beginning, the person setting up the workspace creates their own account, which by default has Administrator privileges. In the following steps, Administrators will be able to create accounts for other users. An unlimited number of accounts can be created, but only the number of users covered by the purchased license can be active.

To create a User account, go to the portal and, under the "Users" tab, select the option "Add".



Next fill in all the User's information like their first name, last name, and email address. The user will receive an invitation to the workspace at the provided email address, where they can configure their password.

The User must also be assigned a role, which by default includes Administrator, Manager, and Designer. An unlimited number of Administrator accounts can be created within the license, but it is recommended to maintain a ratio of 1 administrator for every 50 Users. The differences between the roles are as follows:

Functionalities	Designer	Manager	Administrator
Viewing project statistics	✓*	✓*	✓
Managing projects	×	✓*	✓
Managing Users' accounts	×	×	✓
Creating new Departments	×	×	✓
Creating new Projects	×	×	✓
Admin statistics	×	×	✓
Creating new Templates	×	×	✓
Creating naming conventions	×	×	✓
Blocking functions for Users	×	×	✓

*applies to projects the User takes part in

The next step is assigning Users to Departments. It is possible to block certain functions and load templates for Users within specific departments. This also serves statistical purposes and helps in sorting Users more efficiently. Thanks to this division you can, for example, verify the size of models created by each department.

While creating a User's account, you can also configure rules for blocking specific functions and set a naming standard that he/she must follow. It's important to remember that blocking functions at this stage takes precedence over blockades assigned to individual projects and departments.

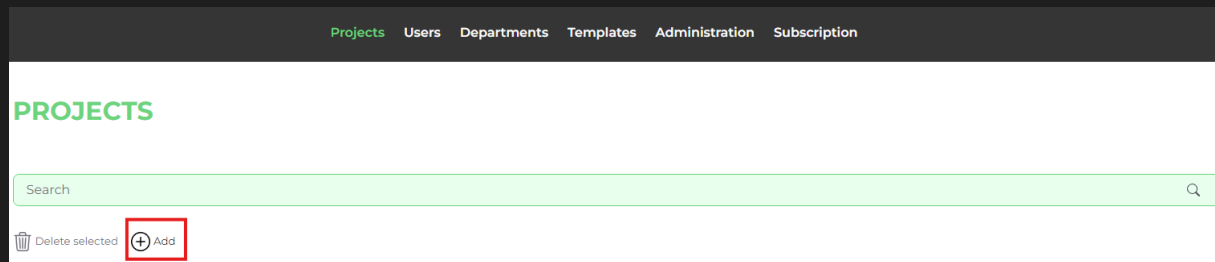
Creating Templates

In the "Templates" tab we can create a function template and a naming template, so we don't need to manually configure blocked functions during project or department setup later.

After filling out the name and description of the template, save it to unlock the tabs for setting blocked functions and naming rules.

Creating Projects

New projects are created by going to the "Projects" tab and selecting "Add New."



Fill in the project's details such as number, name, description and the address of the investment. The most important field is "Project Models Location." You need to enter the location where the project files will be stored. Enter it using a regular expression. Below is an example of such a location:

`C:\\XXX-Project1\\BIM\\02-Shared\\02-BIM.*`

This means that statistics from all models located in the 02-BIM folder of Project1 on the C drive will be recorded as this project. The functions configured for the project will also be blocked in these models. The model statistics will be updated every time the file is saved or synchronized. If you encounter difficulties with regular expressions, we recommend the website <https://regex.com/>, where all expressions are explained. Additionally, you can always contact us and we'll gladly assist you with configuration!

After saving the project, the option to assign a template for blocked functions or a naming template will be unlocked. You can also configure these settings manually.

Creating Departments

Departments are created similarly to projects. In the corresponding tab, select "Add New" and fill in the details. In addition to the basic descriptions, you can also assign a function template that will apply to all users assigned to the department. It's recommended to divide users by discipline, project teams, or by Revit expertise level. This way, trusted users will have fewer blocked functions compared to those whose work requires closer attention from the BIM Manager.

Functionalities description

Blocking functions

BIM Guide's core functionality is the ability to block functions in Revit in real-time. This can be done at three levels – for individual users, across the entire project, or within an entire department.

Function name	On/Off	Status	Announcement	Exclusion	Notification	Recipients
<input type="checkbox"/> AcquireCoordinates	<input checked="" type="checkbox"/>	Warning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JG

To block a function, first, you need to initiate the data retrieval from Revit related to that function. This is done by toggling the "On/Off" switch. Next, you can choose one of four statuses:

1. **Allowed** – The function is permitted, and no statistics regarding its usage are collected.
2. **Monitoring** – The function is permitted, and statistics on its usage are collected.
3. **Warning** – The function is permitted, but the user will receive a text notification upon using it, which you can configure in any way.
4. **Prohibited** – The function is prohibited. You can prepare a notification for the user.

After selecting the protection method, you can also customize the message that appears to users when they attempt to use the blocked function. For example, this message can explain why the function is prohibited or refer the User to company standards.

The final option is setting up a notification. This means that a designated person will be informed via email when a user uses a specific function at a given time. You can choose more than one person for this notification.

An additional option available in the project-level configuration of blocked functions are **Exclusions**. By clicking the "+" button, you can add specific people to the so-called "white list," meaning they will not be subject to the block. For instance, you could prevent the entire project team from linking model files, except for one person who will be responsible for it. This helps to maintain order in the linked files.

Naming standards

With BIM Guide you can also enforce a naming standard for models created by users. To do this, go to the "Naming" section when editing a User, Project or a Template.

Use a regular expression to establish a naming rule for the files. You can customize the message and choose a person to be notified in case somebody names a file incorrectly.

To better understand regular expressions, we recommend the website <https://regexr.com/>, where you can find a description of each symbol and a field to test if an expression complies with the created rules. Regular expressions are also described in detail on Wikipedia page https://en.wikipedia.org/wiki/Regular_expression.

Summary

That's all for now. We wish you a pleasant experience using BIM Guide! We hope we'll help you maintain order in your models, educate your designers, and create Revit files of the highest quality. May no unwanted DWG file ever be imported into your model again!