

# Allplan Online Layout Distribution with Allplan Exchange

Steps to Success

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# Welcome!

This guide is designed to give you a detailed overview of the various options offered by online layout distribution using Allplan Exchange.

In nine steps you will learn how to export layouts from **Allplan** in order to upload them to the **Allplan Exchange Web** web platform. In addition, you will find out how other project participants can download the layouts from the **Allplan Exchange Web** web platform.

Have fun! We wish you every success!





# Basics

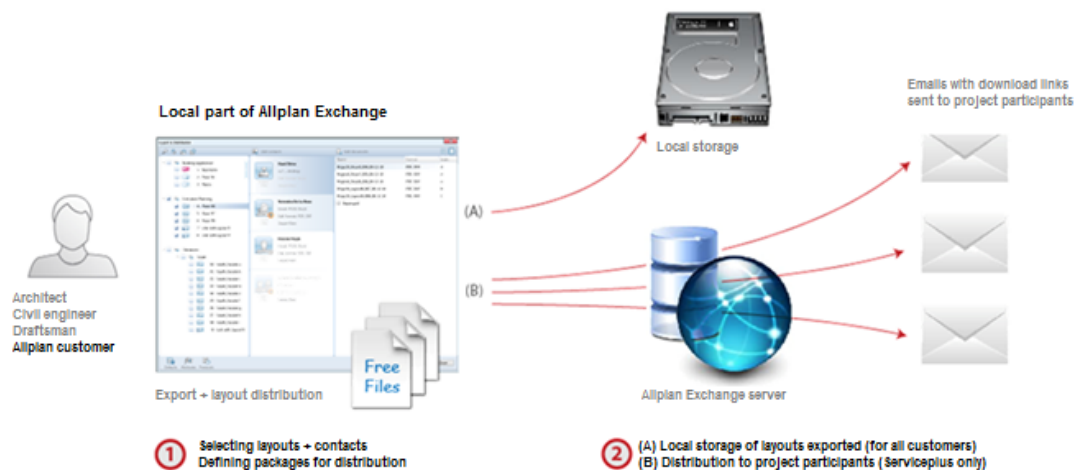
## What is Allplan Exchange?

Allplan Exchange, which is provided by the Allplan CAD system, enables you to distribute layouts created in Allplan over the Internet to other project participants. In doing so, you can choose from various data formats.

Thanks to this comfortable tool for web-based layout distribution, all those involved in a project can access the latest data at any time over the course of a project.


In addition, Allplan Exchange records everything in a log file, so that you can always keep track of who has opened or downloaded which layouts and when.

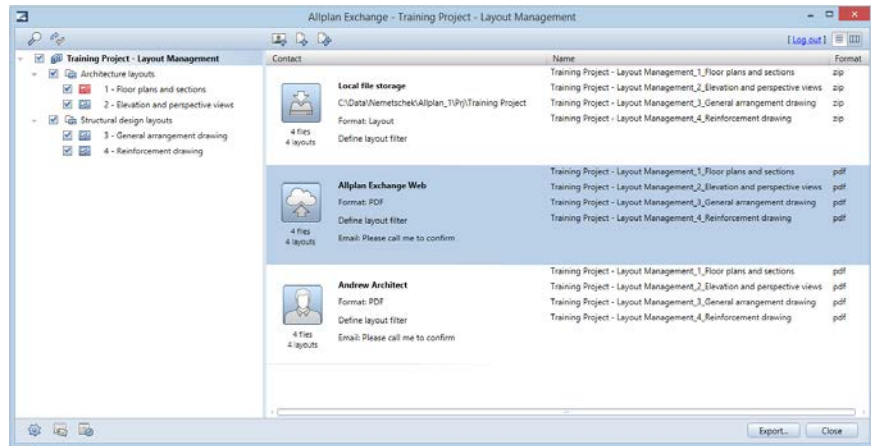
## Online layout distribution



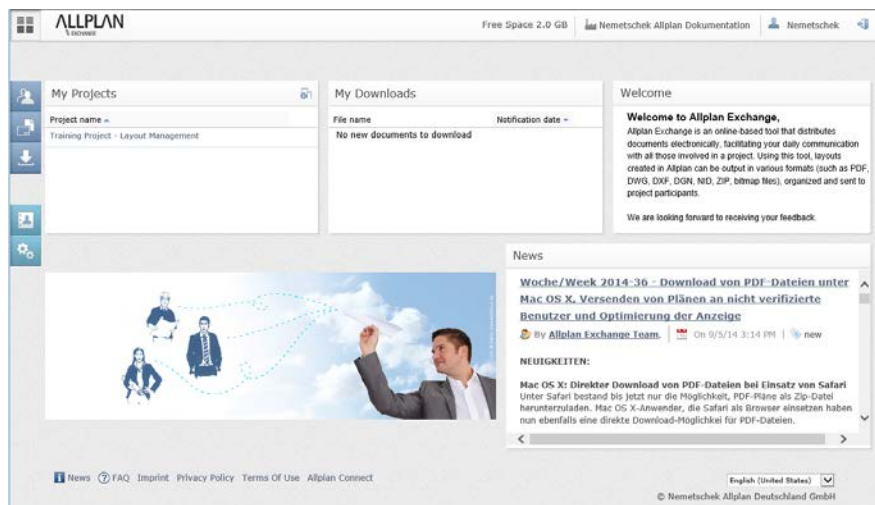
# Structure of Allplan Exchange

Allplan Exchange consists of two basic, interacting areas:

- The  **Allplan Exchange Layout Distribution** tool, which you can access straight from Allplan, with its central **Allplan Exchange** dialog box:



- The **Allplan Exchange Web** web platform, which you can access using the web browser (address: [exchange.allplan.com](http://exchange.allplan.com)).



# Overview of roles and access rights


A contact can have one role per organization. But each contact can be assigned to several projects and given different access rights for each project.

	Organization role			Project access rights		
	ADMIN	EMPLOYEE	GUEST *)	MANAGE**)	DISTRIBUTE	DOWNLOAD*)
*) By default, a new contact is given the GUEST organization role; a new contact added to the list of project participants is given the DOWNLOAD project access right. **) An organization administrator added to the list of project participants is automatically given the MANAGE project access right.						
<b>Contacts of an organization</b>						
Create	X	X				
Delete	X					
Show	X	X		X		
Change	X	X				
<b>Organization roles of contacts</b>						
Show	X	X				
Define	X					
<b>Web projects</b>						
Create	X	X				
Delete	X					
Show in CAD system				X	X	
Show on the web				X	X	X
Assign CAD project to web project				X	X	
<b>Project participants</b>						
Show				X	X	
Define				X		
Show access rights				X	X	
Define access rights				X		
<b>Documents</b>						
Show				X	X	
Upload				X	X	
Send				X	X	
Download				X	X	
Delete				X	X	
<b>My downloads</b>						
Show				X	X	X
Download				X	X	X



# Requirements

## Registering at Allplan Exchange

You can only use Allplan Exchange for online layout distribution if you are a registered user of Allplan Exchange. Otherwise, you can use the  **Allplan Exchange Layout Distribution** tool for local file storage but you cannot distribute layouts over the Internet.

First your company or office needs to be registered once based on your customer number. This defines the "Allplan Exchange Organization" to which you belong. In addition, the user who registers the organization is set up as the "Allplan Exchange Administrator" (= organization administrator) for this organization and becomes its first member.

Using the tools provided by the **Allplan Exchange Web** web platform, the organization administrator can then register more "Allplan Exchange users" by adding them to the organization and giving them the corresponding roles and access rights.

## Registering organization at Allplan Exchange

### Important!

Please note that you can register your organization at Allplan Exchange only when you are authorized to represent your company or office.

---

### To register at Allplan Exchange

- You are authorized to represent your company or office.
  - The customer number of your company or office is included in your profile in Allplan Connect.
- 1 Use the web browser (connect.allplan.com) to open the **Allplan Connect** service platform and log in.

- 2 The menu bar at the top of Allplan Connect includes the **Service** item. Open it and click **Allplan Exchange**.
  - 3 Follow the instructions displayed on screen.
- 



## Registering organization members at Allplan Exchange

Basically, every existing email address can be invited by email to join Allplan Exchange. However, the final registration at Allplan Exchange is not completed until the recipient of the email accepts the invitation by entering the verification code.

The invitation to an Allplan Exchange organization can only be sent by the organization administrator (or an organization member with administrator privileges).

---

### To invite more members to your organization

- Your organization is registered at Allplan Exchange.
  - You have logged in to **Allplan Exchange Web** (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - You have an organization role in the relevant Allplan Exchange organization (see "Overview of roles and access rights (on page 5)" table).
- 1 *Only if you belong to several organizations:*  
Select the organization to which you want to invite a new member.
  - 2 Click  **Address book** on the navigation bar.  
  
The **Contacts - List** opens. It contains the current contacts for the selected organization.
  - 3 Click  **Create**.

- 4 The **Contacts - Invite** form opens. Fill out the form, in particular, the fields marked with an \*. When you have finished, click **Invite**.

Or:

Use **Contacts - Invite (VCF Import)** to import the contact data from a VCF file.

The person you have invited receives two emails:

- A welcome email with the *login details* (email address and temporary password)
  - Another email with the *verification code*
- 

Using the information in these two emails, the person you have invited can verify and thus complete the registration at Allplan Exchange.

#### **Important!**

A person invited *cannot* be selected as a contact in Allplan until the registration has been verified.

---

### **To verify your registration at Allplan Exchange**

- You have received two emails (welcome email and email with verification code).
- 1 Open the web browser and go to the **Allplan Exchange Web** web platform (connect.allplan.com).
  - 2 Enter the email address and temporary password, which you have received together with the welcome email, in the boxes provided. Make sure that the spelling is identical.
  - 3 Click **Log in** and confirm the terms of use and privacy policy.
  - 4 Enter the verification code, which you can find in the second email.
  - 5 Finally, choose your own password.

#### **Important!**

It is a good idea to make a note of the password; you *cannot* log in to Allplan Exchange without it.

---

# Installing the training project

To make things clearer, this guide uses the **Training Project - Layout Management**, with which you may already be familiar. This training project is not mandatory; rather, you can also use your own layouts and files to follow the steps described.

If you want, you can download the training project from **Allplan Connect** ([connect.allplan.com](http://connect.allplan.com)); however, this is only possible when you have registered as a Serviceplus customer at Allplan Connect. To download the training project, go to the **Training - Documentation** area.

After having downloaded the **Training Project - Layout Management**, you can import this project into Allplan.

---

## To import the training project into Allplan

- Allplan is installed, registered, correctly configured and running.
- You have downloaded the training project from Allplan Connect and extracted the data.

- 1 Exit Allplan.

**Note:** When you work in a network environment, check that Allplan is not running on any workstation.

- 2 Log on as the system administrator.
- 3 Open Windows Explorer and select the folder with the **Allplan Layout Management Tutorial.EXE** file.
- 4 Double-click **Allplan Layout Management Tutorial.EXE**.
- 5 Follow the instructions displayed on screen.
- 6 When installation is complete, click **Finish**.

You can now select the **Training Project - Layout Management** in Allplan.

---



# Steps to Take

## Step 1: logging in to Allplan Exchange

- Logging in to Allplan Exchange using the Allplan workstation
- Logging in to the Allplan Exchange Web web platform directly

## Step 2: maintaining the Address Book (Organization Administrator only)

## Step 3: creating an Allplan Exchange web project

## Step 4: defining project participants (project administrator only)

## Step 5: assigning Allplan project to an Allplan Exchange web project

## Step 6: exporting and sending layouts

- Selecting layouts for distribution
- Specifying contacts
- Specifying data formats for contacts
- Setting a layout filter for contacts
- Adding a message
- Sending custom files
- Exporting layouts and uploading data
- Checking and correcting the files for distribution

## Step 7: reviewing and managing documents (project administrator only)

- Displaying an overview of all documents of a web project
- Retrieving information on the documents
- Outputting information on the documents
- Deleting documents and files from a web project

**Step 8: reviewing and managing your own downloads (project participant)**

- Displaying an overview of all your downloads
- Retrieving information on your downloads

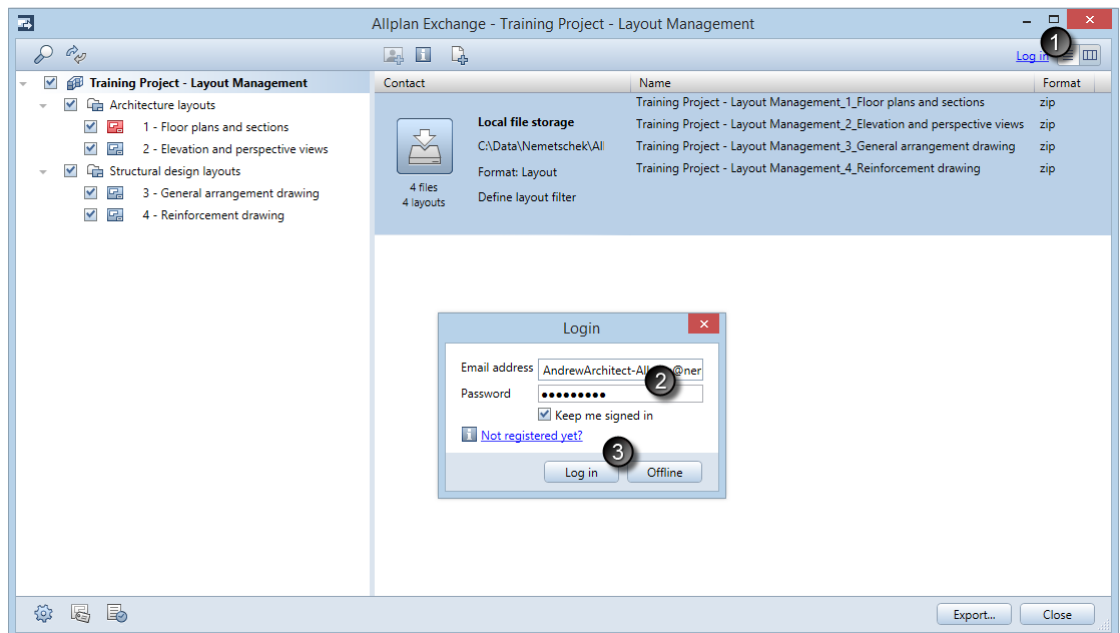
**Step 9: downloading documents from Allplan Exchange Web**

- Downloading documents using the download email
- Downloading documents directly as a project participant
- Downloading documents directly as the project administrator

# Step 1: Logging in to Allplan Exchange

Your login details (email address and password you selected) are the same, regardless of how you log in to Allplan Exchange: You can use the Allplan workstation or the web browser to log in directly to the Allplan Exchange Web web platform.

## Logging in to Allplan Exchange using the Allplan workstation





You must use the Allplan workstation to log in to Allplan Exchange if you want to select contacts for a package, upload layouts and files to Allplan Exchange Web or send layout and files over the Internet.

### Important!

The login to Allplan Exchange using the Allplan workstation is independent of the login to the Allplan Exchange Web web platform using the web browser. In other words, logging in directly to Allplan Exchange Web does *not* automatically log you in to Allplan Exchange using the Allplan workstation and vice versa.

---



## To log in to Allplan Exchange using the Allplan workstation

- You are a registered user of Allplan Exchange (see "Registering at Allplan Exchange (on page 7)").
- Allplan is running.
- 1 Switch to layout editor by clicking the  Layout Editor icon on the Default toolbar.
- 2 Select the Create menu, point to Layout and click  Allplan Exchange Layout Distribution.


The Allplan Exchange dialog box opens.

- 3 Click Log in .

The Login details dialog box opens.

- 4 Enter your login details in the corresponding boxes .
- 5 Click Log in .

This connects the Allplan workstation with the Allplan Exchange Web web platform.

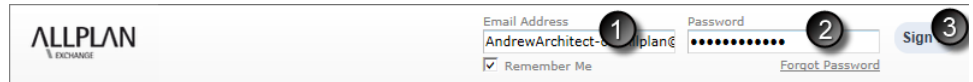
After you have logged in, the  Add contact icon is available. You can now use the full scope of online features provided. For example, you can access project participants and distribute layouts and documents over the Internet.

---

**Tip:** If the Assignment to Allplan Exchange web project dialog box opens, the current Allplan project has *not* yet been *assigned* to an Allplan Exchange web project (see "Step 3: assigning Allplan project to an Allplan Exchange web project (see "Step 5: Assigning Allplan Project to an Allplan Exchange Web Project" on page 23)").

# Logging in directly to the web platform

## Allplan Exchange Web



You must log in directly to the **Allplan Exchange Web** web platform if you want to review or edit the database saved on the web platform (maintaining organization or project contacts, managing documents and so on).

### Important!

The login to Allplan Exchange using the Allplan workstation is independent of the login to the **Allplan Exchange Web** web platform using the web browser. In other words, logging in directly to **Allplan Exchange Web** does *not* automatically log you in to Allplan Exchange using the Allplan workstation and vice versa.

---

### To log in to Allplan Exchange Web directly

- You are a registered user of Allplan Exchange (see "Registering at Allplan Exchange (on page 7)").
- 1 Open the web browser and go to the **Allplan Exchange Web** web platform ([connect.allplan.com](http://connect.allplan.com)).
- 2 Enter the email address **1** and password **2** you specified when you registered at Allplan Exchange. Make sure that the spelling is identical.
- 3 Click **Log in 3**.

The home page of **Allplan Exchange Web** opens.

---



# Step 2: Maintaining the Address Book (Organization Administrator only)

You maintain the contact data of the organization members using the Allplan Exchange Web web platform.




The screenshot shows the Allplan Exchange Web platform interface. The top navigation bar includes 'List', 'Create', and 'Print / Export' buttons. The sidebar on the left contains icons for user management and settings. The main area displays a table of contacts with columns for Surname, First Name, Company, and Organization Role. A search bar is located above the table. A dropdown menu is open for the 'Client' contact, showing options for 'Employee', 'Administrator', 'Guest', and 'Employee'. A 'Delete' button is visible next to the dropdown. The bottom of the page includes a footer with links to 'News', 'FAQ', 'Imprint', 'Privacy Policy', 'Terms of Use', and 'Allplan Connect', along with a language selector set to 'English (United States)' and a copyright notice for 'Nemetschek Allplan Deutschland GmbH'.

Surname	First Name	Company	Organization Role
Architect	Andrew	Wolle und Partner	Administrator
Client	Clive	Fraunhofer Gesellschaft	Employee
Electric	Ernst	PLT Mannheim	Administrator
Engineer	Steve	Bavarian Engineers	Guest
Landscape	Laura	Green Thumb Inc.	Employee
Merkl	Dieter		Administrator
Mertin	Bettina		Administrator
Schneider	Balázs		Employee
Site	Sid	Builders Inc.	Employee
Stöckhuber	Paul	Nemetschek Allplan Systems GmbH	Administrator

## Important!

Only the organization administrator (or an organization member with ADMINISTRATOR privileges) can edit the data of the other organization members or create new members (see "Registering at Allplan Exchange (on page 7)").

## To maintain the address book of your Allplan Exchange organization

- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - You have an organization role in the relevant Allplan Exchange organization (see "Overview of roles and access rights (on page 5)" table).
- 1 *Only if you belong to several organizations:*  
Select the organization ❶ in which you want to change the contact data of a member or to which you want to invite new members.
  - 2 Click  **Address book** ❷ on the navigation bar.  
The **Contacts - List** page opens.
  - 3 The table contains all the contacts that have already been created for the selected organization.
    - Select the list of your organization contacts ❸.
    - You can  **Create** ❹ new contacts manually or by importing a VCF file.
    - You can  **Print / Export** ❺ a list of the organization contacts in PDF or Excel format.
    - Use the **Organization Role** ❻ column to specify which role the person is to have in the organization.

**Note:** You can find a detailed list of roles and the associated access rights in the section entitled "Overview of roles and access rights (on page 5)".

- You can scan the organization for specific contacts ❼.
- You can delete contacts ❽.

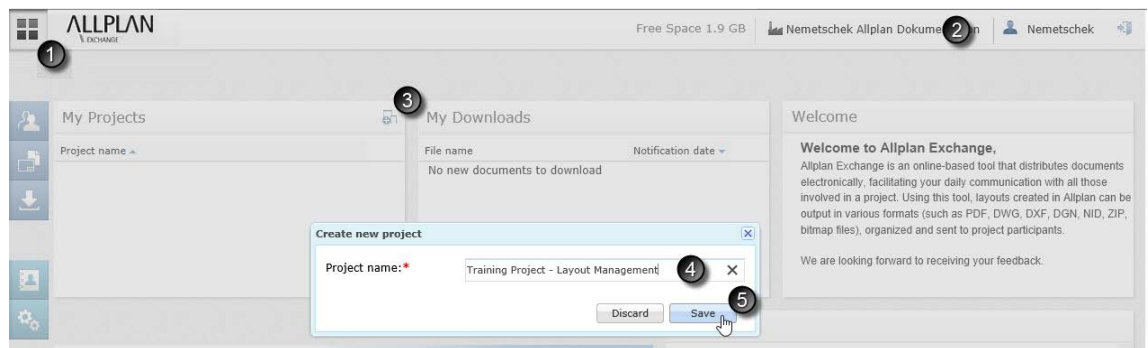


# Step 3: Creating an Allplan Exchange Web Project

Each Allplan project for which you want to distribute layouts or documents using Allplan Exchange must be assigned to a web project on the Allplan Exchange Web web platform.

Conversely, an Allplan Exchange web project can be associated with several CAD projects from Allplan, which is even essential when it comes to complex construction projects requiring the collaboration between various office organizations based in different locations.

This is the only way to ensure that all those involved can access the contact data defined using the web project even if they work on different Allplan projects. In addition, this assignment is indispensable for analyzing the information on the downloads and uploads of all the documents of a construction project across all Allplan projects.





## Important!

The person who creates a new Allplan Exchange web project automatically becomes the administrator of this web project; only the administrator can grant other project participants the **MANAGE** project access right.

---

## To create a web project directly in Allplan Exchange Web

- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - You have an organization role in the relevant Allplan Exchange organization (see "Overview of roles and access rights (on page 5)" table).
- 1 Open the home page of Allplan Exchange Web.  
To do this, click  Go to .... ①.
  - 2 *Only if you belong to several organizations:*  
Select the organization ② for which you want to create the Allplan Exchange web project.
  - 3 Click  Create new project ③.
  - 4 Enter a name for the web project in the Create new project dialog box ④.
  - 5 Click Save to confirm ⑤.
- 

**Note:** You will learn how to use Allplan to create web projects in step 5.

# Step 4: Defining Project Participants (Project Administrator only)

You can only send layouts to contacts that have been defined as project participants for the web project to which the relevant Allplan project is assigned using the Allplan Exchange Web web platform.

Project participants - List

	Surname	First Name	Company	Access Rights
<input type="checkbox"/>	Architect	Andrew	Wolle und Partner	manage
<input type="checkbox"/>	Client	Clive	Fraunhofer Gesellschaft	download
<input type="checkbox"/>	Electric	Ernst	PLT Mannheim	download
<input type="checkbox"/>	Engineer	Steve	Bavarian Engineers	download
<input checked="" type="checkbox"/>	Landscape	Laura	Green Thumb Inc.	download
<input type="checkbox"/>	Merkl	Dieter		download
<input type="checkbox"/>	Mertin	Bettina		manage
<input type="checkbox"/>	Site	Sid	Builders Inc.	distribute
<input type="checkbox"/>				download

Page 1 to 1

Disconnect project participations

English (United States)













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## Important!


Only the organization administrator (or an organization member with the **MANAGE** project access right) can define project participants and their access rights.

By assigning a contact in the address book to several projects, you can give this contact different access rights in different projects.

## To define the participants in a project

- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web on page 15").
- You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights" on page 5).
- 1 *Only if you belong to several organizations:*  
Select the organization  that contains the relevant project.
- 2 *Only if you are involved in several web projects:*  
Select the Allplan Exchange web project for which you want to define or change the project participants.  
  
Click the relevant project in the Project  list box.  
  
Or, on the home page of Allplan Exchange Web:  
Click the relevant project in My Projects.
- 3 Click  **Contacts**  on the navigation bar.  
  
This opens the list of the project participants currently assigned to this project.
- 4 Click  **Manage** , assign the contacts as you need and click **Save**.
- 5 Click  **List**  to switch back to the list of project participants and check the changes.
- 6 Select the access right for the project participant in the **Access right** column .
- 7 You can  **Print / Export**  the list of project participants in PDF or Excel format.
- 8 If a project participant is no longer required, you can also disconnect a contact from a project .

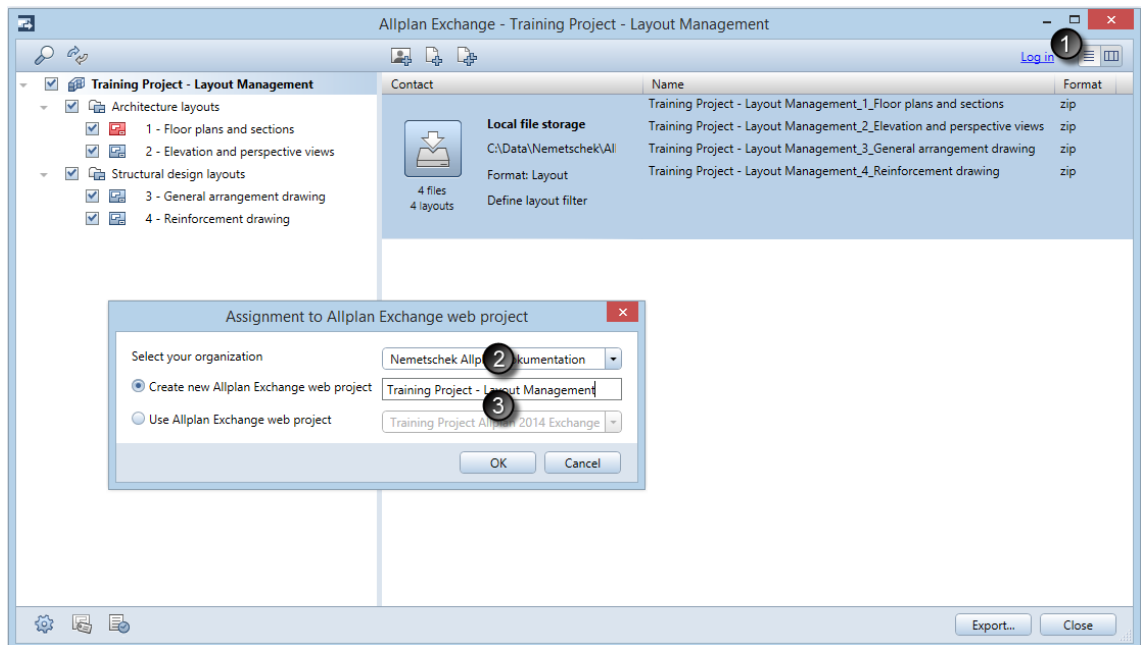
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**Important!** Before you can use the **Contacts** dialog box to access the list of project participants you have changed using Allplan Exchange Web, you need to update the list by clicking  **Update contacts** in the **Contacts** dialog box in Allplan.

# Step 5: Assigning Allplan Project to an Allplan Exchange Web Project



Provided you have the required rights, you can assign an Allplan project to an Allplan Exchange web project whenever you open an Allplan project that has *not* yet been *assigned* to an Allplan Exchange web project.

All you need to do is log in to Allplan Exchange straight from the Allplan workstation.




## To assign an Allplan project to an Allplan Exchange web project

- You are a registered user of Allplan Exchange (see "Registering at Allplan Exchange (on page 7)").
- You have an organization role in the relevant Allplan Exchange organization (see "Overview of roles and access rights (on page 5)" table).
- The project you have opened in Allplan has *not* yet been *assigned* to an Allplan Exchange web project.



- 1 Switch to layout editor by clicking the  Layout Editor icon on the Default toolbar.
- 2 Select the Create menu, point to Layout and click  Allplan Exchange Layout Distribution.

The Allplan Exchange dialog box opens.

- 3 Click Log in  and use your login details to log in to Allplan Exchange.

The Assignment to Allplan Exchange web project dialog box opens.

**Note:** If the Assignment to Allplan Exchange web project dialog box is *not* displayed, the currently open Allplan project has *already been assigned* to an Allplan Exchange web project.

- 4 *Only if you belong to several organizations:*  
Select the organization  in which you want to assign the Allplan project to an Allplan Exchange web project.
- 5 Decide whether you want to create a new web project for the current project or whether you want to assign it to an existing web project .

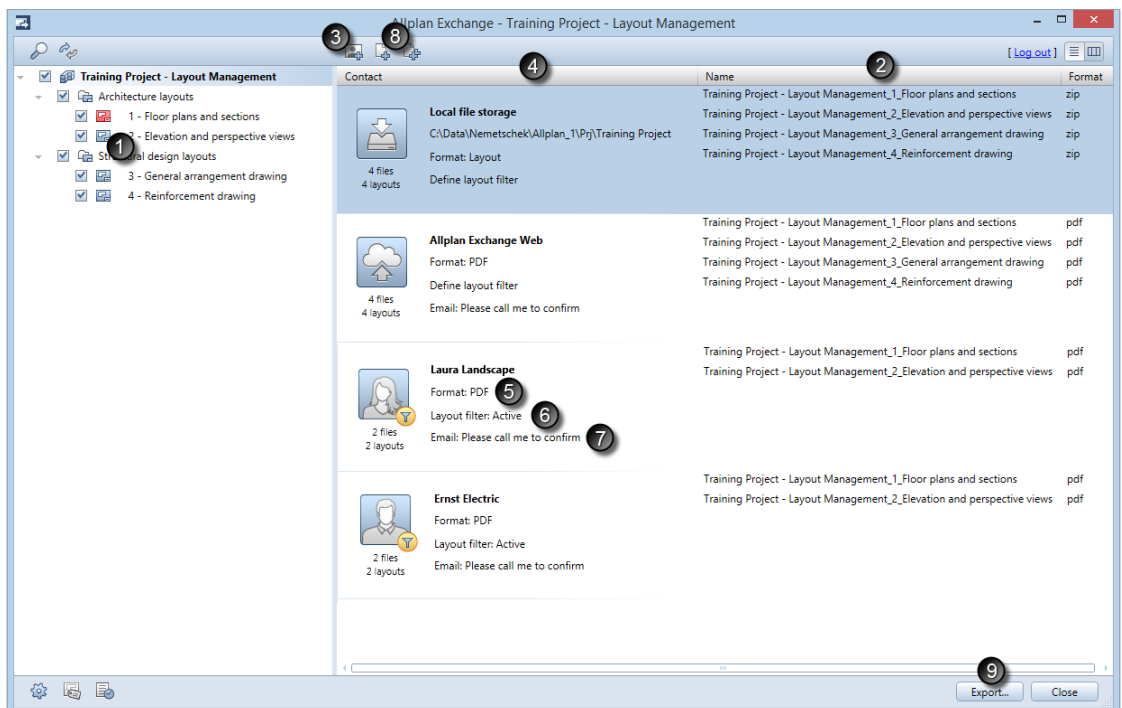
**Note:** The Use Allplan Exchange web project option is only available if *at least* one Allplan Exchange web project has been created within the selected organization.

- 6 Click OK.

# Step 6: Exporting and Sending Layouts

As part of online layout distribution using Allplan Exchange, you can export layouts in different data formats from Allplan and upload them together with custom files to the Allplan Exchange Web platform. Authorized project participants can then download the data from there.

While uploading the data, the program sends a distribution note to the contacts you have specified. This note includes a list of the new layouts and files that are ready for download and direct download links.



Below is a summary of the necessary steps for exporting layouts from Allplan and uploading them to Allplan Exchange Web.

**Note:** Detailed step-by-step instructions can be found in the help for Allplan: **Printing layouts** -> **How to ...** -> **Sending layouts and other files using Allplan Exchange**.

## Selecting layouts for distribution

You can select the layouts for distribution using the layout structure, which is familiar to you from other modules. If you have created a project-specific layout structure for the project, you can also display the layouts in this structure.

The selected layouts are initially added to the distribution lists of *all* the contacts of the current contact list. The same applies to new contacts in the contact list: They initially receive *all* the layouts selected in the layout structure. By setting layout filters, you can control the contents of the packages individually for each contact (see "Setting a layout filter for contacts (on page 29)").

---

### To select the layouts for distribution

- Allplan is running.
- The Allplan Exchange dialog box is open.
- In the **Layout structure** area on the left **1**, select the check boxes of the layouts you want to distribute. To send all the layouts of a structural level, select the check box of the corresponding structural level.

This adds the selected layouts to the distribution lists **2** of all the contacts of the current contact list (in this example, the only contact that is currently available is the **Local file storage**).

---





# Specifying contacts

You can select the recipients (contacts) of a package in the list of the participants assigned to the project (see "Step 4: defining project participants (see "Step 4: Defining Project Participants (Project Administrator only)" on page 21)"). If a contact is missing from the list in the **Contacts** dialog box, you first need to assign this contact as a project participant to the project using the **Allplan Exchange Web** web platform.

**Tip:** You can save the contact list in a favorite file and retrieve it later when needed. Detailed information is provided in the help for Allplan.


---

## To define the contact list

- Allplan is running.
  - The **Allplan Exchange** dialog box is open.
  - You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 Log in to Allplan Exchange *using the Allplan workstation* (see "Logging in to Allplan Exchange using the Allplan workstation (on page 13)" in step 1).
  - 2 Click  **Add contact** .

The **Contacts** dialog box opens. It shows all the contacts that have been assigned as project participants to the current project using the **Allplan Exchange Web** web platform.

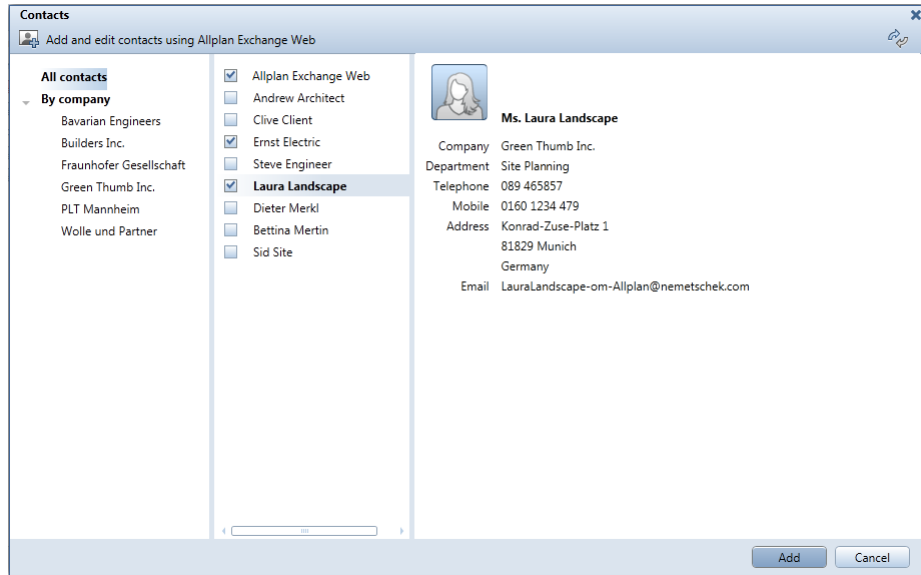
An incomplete list may have the following reasons:

- The list of project participants has changed on Allplan Exchange Web but you have not updated it yet:  
Click  **Update contacts**.
- You can find additional criteria for sorting and grouping contacts in the left column of the **Contacts** dialog box: Check that you have selected the correct category.
- Although the list is complete, you cannot select some contacts: These contacts have not yet verified the registration or they have refused the invitation to Allplan Exchange.


**Important!**

If a specific contact is still missing from the list, you need to assign this contact as a project participant to the project using Allplan Exchange Web.

- 3 Specify the contacts by selecting the corresponding check boxes.



- 4 Click Add.

This adds the selected contacts to the contact list  of the Allplan Exchange dialog box.

# Specifying data formats for contacts


You can specify the data formats of the layouts individually for each contact: For example, you can choose between PDF, DWG, DXF and bitmap format.

A package can even include several data formats.

**Tip:** You can save different combinations of data formats in a favorite file and retrieve them later when needed. Detailed information is provided in the help for Allplan.

---

## To specify the data formats for a contact

- Allplan is running.
  - The **Allplan Exchange** dialog box is open.
  - You have logged in to Allplan Exchange *using the Allplan workstation*.
  - You have defined the contact list.
- 1 Go to the relevant contact and define the data formats for the current package by clicking **Format** .
  - 2 The **Format settings for ...** dialog box opens. Specify the data formats you want to use for the layouts of the current package by selecting the corresponding check boxes.
  - 3 Click **OK**.
- 

# Setting a layout filter for contacts


As the layouts selected in the layout structure are initially assigned to all the contacts, you can set layout filters to control the contents of the packages individually for each contact.

**Tip:** You can save the definitions for individual layout filters in a favorite file and retrieve them later when needed. Detailed information is provided in the help for Allplan.

---

## To set a layout filter for a contact

- Allplan is running.
- The **Allplan Exchange** dialog box is open.
- You have logged in to Allplan Exchange *using the Allplan workstation*.
- You have defined the contact list.

- 1 Go to the relevant contact and set a layout filter by clicking **Define layout filter** .
  - 2 The **Layout filter for ...** dialog box opens. Define the filter conditions for this contact. You can also combine several conditions.
  - 3 Click **OK**.
- 

## Adding a message to the package


A distribution note in the form of an email will be sent to the contacts with each package (except local file storage). This note includes a list of the new layouts and files that are ready for download and direct download links.

In addition, you can include a message in this email for each contact.

---

### To add a message to a contact

- Allplan is running.
- The **Allplan Exchange** dialog box is open.
- You have logged in to Allplan Exchange *using the Allplan workstation*.
- You have defined the contact list.

- 1 Go to the relevant contact and click **Email** .
  - 2 Select the message(s) in the list box by selecting the relevant check boxes.
- 

**Tip:** If the message you need is not included in the list, you can define additional messages using the template for the email. Detailed information is provided in the help for Allplan.

# Sending custom files

In addition to Allplan layouts, you can also distribute custom files, such as Word documents and time schedules, using Allplan Exchange. In this context, custom files are files that are not created by Allplan.

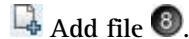
---

## To add custom files to the distribution list

- Allplan is running.
- The Allplan Exchange dialog box is open.
- You have logged in to Allplan Exchange *using the Allplan workstation*.
- You have defined the contact list.

1 *If you want to add a custom file to an individual contact:*


Click the contact who is to get an additional file and then click



Add file

Or:

*If you want to add a custom file to all the contacts in the contact list:*

Click  Add file to all contacts

- 2 The **Select file to add** dialog box opens. Select the file you want to use and click **Open**.
- 

# Exporting layouts and uploading data

Once you have specified the contacts and selected the layouts to be distributed, you can start exporting the selected layouts from Allplan and setting up the files for distribution.

After this, you can upload the data immediately or check it first (see the next section: "Checking and correcting the files for distribution (on page 33)").

---

## To start exporting the layouts and uploading the data

- Allplan is running.
- The Allplan Exchange dialog box is open.
- You have logged in to Allplan Exchange *using the Allplan workstation*.
- You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- You have defined the contact list and the distribution lists.

### 1 Click **Export** .

The **Export** dialog box opens. You can see an overview of the layouts and files selected for distribution.

- 2 Make sure that the list is complete and check the data formats and contacts assigned.
- 3 Using the **Send immediately after export** option, you can specify whether the program is to upload the data immediately after having set up the files for distribution or later.
- 4 Click **Start**.

The program exports the selected layouts from Allplan and creates temporary files for distribution.

### 5 *Only if you have selected the **Send immediately after export** option in step 3:*

Following the export, the program automatically converts the temporary files to packages for the contacts and starts uploading the data to Allplan Exchange Web.

You can see the current status of the upload process:... **waiting for upload** -> **Uploading ...** -> **Finished**. Once the upload is complete, the **Export** dialog box closes automatically.

At the same time the program sends the distribution note by email to the contacts you have specified. This note includes information on the available documents and direct download links.

Or:

*Only if you have not selected the Send immediately after export option in step 3:*

After the export, you can check and, if necessary, correct the temporary files for distribution a final time. To do this, use the procedure described in the next section: "Checking and correcting the files for distribution (on page 33)".

---

## Checking and correcting the files for distribution

If you want, you can check and, if necessary, correct the temporary files before you upload them: Using the **Send immediately after export** option (Export dialog box), you can specify whether the program is to upload the data to Allplan Exchange Web immediately after having set up the files for distribution or later.

When you select the second option, you can not only check the name and assigned contacts but also see the contents and date of creation of each file. You can do this immediately after export or at any time; all you need to do is open the Export dialog box again.

---

### To check the files for distribution

- Allplan is running.
- Temporary files are available, that is to say, you have already exported the data.
- The Allplan Exchange dialog box is open and has *not been closed* since the last export.
- The **Send immediately after export** option (Export dialog box) was *not* selected during the last export.

- 1 *Only if you have closed the Export dialog box in the meantime:* Click **Export** .

The Export dialog box opens. You can see an overview of the layouts and files that have already been set up for distribution.

- 2 Check the data format, file name, file size, time stamp and the contacts for each file.

3 Click  **Preview** to display the contents of the file.

4 If everything is okay, click **Send**.

Or:

If you want to change something, follow the steps described below.

---

If you find a missing contact or an obsolete layout, you do not need to export the whole data again. Rather, you can delete individual files and create these files again.

---


### To correct individual files

➡ Allplan is running.

➡ The **Export** dialog box is open.

➡ The **Send immediately after export** option is *not* selected.

➡ Temporary files are available, that is to say, you have already exported the data.

1 Delete the incorrect files by clicking  **Delete temporary file** in the relevant line.

2 If you want to create these files again without changing the contacts assigned or the layout list, click **Start**.

Or:

If you want to change the contacts assigned or the layout list, click **Close**, change the data as you need in the **Allplan Exchange** dialog box, click **Export** and export the data again.

3 If everything is okay, click **Send**.

---



# Step 7: Reviewing and Managing Documents (Project Administrator only)

In the previous step you exported layouts from Allplan and uploaded data to the Allplan Exchange Web web platform.

All the uploaded layouts and files of an Allplan Exchange web project are saved on the Allplan Exchange Web web platform and can be managed there.

Provided you have the required access rights for a web project, you can not only display an overview of all the documents currently saved for this project on Allplan Exchange Web but also retrieve detailed information on these documents, such as upload and download details, layout attributes, document versions, file versions and so on.

**ALLPLAN EXCHANGE**

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Project: Training Project - Layout Management

Print / Export

All Documents - List

File name	Layout number	Layout name	File type	Index	Upload date
Training Project - Layout Management_1_Floor plans and sections.pdf	1	1_Floor plans and sections	pdf	No Index Specified	14.01.2017
Training Project - Layout Management_1_Floor plans and sections.zip	1	1_Floor plans and sections	zip	No Index Specified	14.01.2017
Training Project - Layout Management_2_Elevation and perspective views.pdf	2	2_Elevation and perspective vi...	pdf	No Index Specified	14.01.2017
Training Project - Layout Management_2_Elevation and perspective views.zip	2	2_Elevation and perspective vi...	zip	No Index Specified	14.01.2017
Training Project - Layout Management_3_General arrangement drawing.pdf	3	3_General arrangement drawing	pdf	No Index Specified	14.10.2014
Training Project - Layout Management_3_General arrangement drawing.zip	3	3_General arrangement drawing	zip	No Index Specified	14.01.2017
Training Project - Layout Management_4_Reinforcement drawing.pdf	4	4_Reinforcement drawing	pdf	No Index Specified	14.10.2014
Training Project - Layout Management_4_Reinforcement drawing.zip	4	4_Reinforcement drawing	zip	No Index Specified	14.10.2014

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Delete Send Download (zip)

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Show: All

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# Displaying an overview of all documents of a web project

## To display the overview of all the documents of an Allplan Exchange web project

- ➔ You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - ➔ You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 *Only if you belong to several organizations:*  
Select the organization **1** that contains the relevant project.



- 2 *Only if you are involved in several web projects:*  
Select the Allplan Exchange web project for which you want to display an overview of the documents saved.  
  
Click the relevant project in the Project  list box.  
  
Or, on the home page of Allplan Exchange Web:  
  
Click the relevant project in My Projects.
  - 3 Click  Documents  on the navigation bar.  
  
The overview  shows the latest version of all the documents of the selected web project that are currently saved on the Allplan Exchange Web web platform.  
  
**Note:** Click  Document - Details  to get information on all the other versions of a document or its upload and download history (see the next section: "Retrieving information on the documents (on page 37)").
- 

## Retrieving information on the documents

Using Allplan Exchange, you can always keep track of the history of the documents that are currently saved on Allplan Exchange Web. For example, you can use this information as a basis for subsequent analyses.

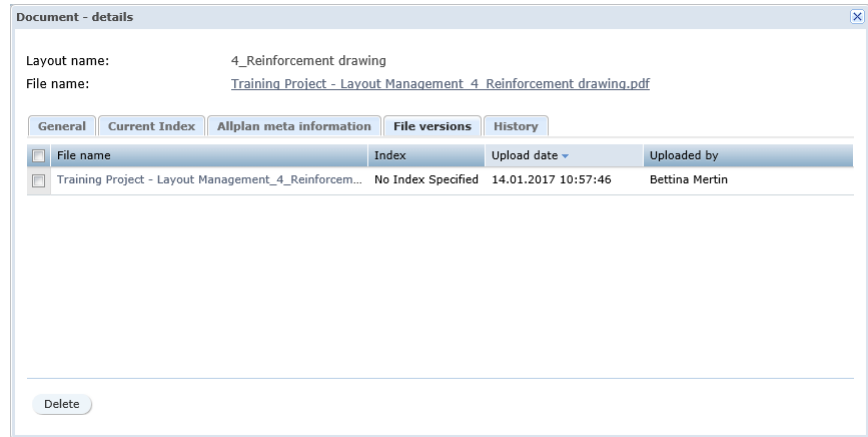
---

### To retrieve information on the versions and history of a document

- You have opened the overview of all documents for the relevant Allplan Exchange web project (see "Displaying an overview of all documents of a web project (on page 36)").
  - You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 Point to the document on which you require information and click  Document - Details .
- The Document - Details form is displayed.

## 2 Select the required section:

- The **File versions** section provides information on the versions of the document (for example, including **Layout index a**, **Layout index b** and so on). In addition, you can see who uploaded the individual versions and when.



- The **History** section provides information on the contacts and the time the distribution note was sent. In addition, you can see whether the relevant contact has already downloaded the file.



As you can see, the project administrator can keep track of all the relevant details of a file at any time.

# Outputting information on the documents

The information on the versions and history of the documents saved on the Allplan Exchange Web web platform can be saved in PDF or Excel files.

---

### To output information on the versions and history of the documents

- You have opened the overview of all documents for the relevant Allplan Exchange web project (see "Displaying an overview of all documents of a web project (on page 36)").
  - You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 Click  **Print / Export** .
  - 2 Select the required settings in the **Print / Export** form. When you have finished, click **Print / Export**.
  - 3 In the next dialog box you can specify whether the file is to be saved or opened immediately by the corresponding application.
- 

## Deleting documents and files from a web project

You can delete individual versions of a document or the entire document with its complete history, which means *all* its versions and details, from an Allplan Exchange web project.



### ATTENTION!

The history of a document deleted in its entirety from Allplan Exchange Web *cannot* be *restored*!



---

### To delete individual versions of a document

- You have opened the overview of all documents for the relevant Allplan Exchange web project (see "Displaying an overview of all documents of a web project (on page 36)").
- You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).

- 1 Point to the document of which you want to delete *individual versions* and click  **Document – Details** .
  - The **Document – Details** form is displayed.
  - 2 Select the **File versions** section.
  - 3 Choose the document versions you want to delete by selecting the corresponding check boxes in the first column and click **Delete**.
- 



### To delete documents including all versions and the complete history

- You have opened the overview of all documents for the relevant Allplan Exchange web project (see "Displaying an overview of all documents of a web project (on page 36)").
- You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- *If you want to delete a single document:*  
Point to the document you want to delete and click  **Delete** in the last column .

#### ATTENTION!

This deletes the selected document and its *complete history*; this process is *irrecoverable*!

Or:

- *If you want to delete several documents:*  
Choose the documents you want to delete by selecting the corresponding check boxes in the first column  and click **Delete** .

#### ATTENTION!

This deletes the selected documents and the *complete history*; this process is *irrecoverable*!

---

# Step 8: Reviewing and Managing Your Own Downloads (Project Participant)

All the layouts and files for a project participant are saved on the Allplan Exchange Web web platform and can be managed there.

Provided you have the required access rights for the corresponding Allplan Exchange web project, you can display an overview of all the project documents that are available to you.

The screenshot displays the Allplan Exchange Web interface. At the top, the Allplan logo is on the left, and the user 'Nemetschek' is logged in on the right. The 'Project' dropdown is set to 'Training Project - Layout Management'. The main section is titled 'My Downloads' and contains a table of downloaded files. The table has columns: File name, Layout number, Layout name, File type, Layout index, and Notification date. The files listed are related to 'Training Project - Layout Management' and include floor plans, elevation views, and reinforcement drawings. Numbered callouts (1-5) highlight specific UI elements: 1 points to the user profile, 2 to the project dropdown, 3 to the sidebar, 4 to a download icon, and 5 to a file name.

File name	Layout number	Layout name	File type	Layout index	Notification date
Training Project - Layout Management_1_Floor plans and sections.pdf	1	1_Floor plans and sections	pdf	No Index Spec...	2 minutes ago
Document - details layout Management_1_Floor plans and sections.zip	1	1_Floor plans and sections	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_2_Elevation and perspective...	2	2_Elevation and perspective views	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_2_Elevation and perspective...	2	2_Elevation and perspective views	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_3_General arrangement dra...	3	3_General arrangement drawing	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_3_General arrangement dra...	3	3_General arrangement drawing	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_4_Reinforcement drawing.pdf	4	4_Reinforcement drawing	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_4_Reinforcement drawing.zip	4	4_Reinforcement drawing	zip	No Index Spec...	2 minutes ago

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# Displaying an overview of all your downloads

---

## To display the overview of all your downloads of a web project



- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 *Only if you belong to several organizations:*  
Select the organization ❶ that contains the relevant project.
  - 2 *Only if you are involved in several web projects:*  
Select the Allplan Exchange web project for which you want to display an overview of the documents that are available to you.  
  
Click the relevant project in the Project ❷ list box.  
  
Or, on the home page of Allplan Exchange Web:  
  
Click the relevant project in My Projects.
- 3 Click  My Downloads ❸ on the navigation bar.  
  
The overview ❹ shows the latest version of all the uploaded documents of the selected web project that are currently available to you on the Allplan Exchange Web web platform.  
  
Note: Click  Document - Details ❺ to get information on all the other versions of a document or its upload and download history (see the next section: "Retrieving information on my own downloads (see "Retrieving information on your own downloads" on page 43)").
-



# Retrieving information on your own downloads

Using the information saved for each version of a document, you can always find out which versions of a document are available to you, when distribution notes were sent to you and whether and when you downloaded a document version.

## To retrieve information on the versions and history of your downloads

- ➡ You have opened the overview of your downloads for the relevant Allplan Exchange web project (see the previous section: "Displaying an overview of all your downloads (on page 42)").
  - ➡ You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 Point to the document on which you require information and click  **Document - Details** .

The Document - Details form is displayed.

Document - details (downloads)

Layout name:1\_Floor plans and sections

File name:Training Project - Layout Management 1\_Floor plans and sections.zip

General

Current Index

Allplan meta information

File versions

File name	Layout index	Upload date	Uploaded by	Notification date	Download date
Training Project - Layout Management_1_Flo...	No Index Sp...	14.10.2014 10:59:36	Bettina Mertin	14.01.2017 11:16:19	14.01.2017 11:22:41

2 Select the required section:

- The **File versions** section provides information on the versions of the document (for example, including **Layout index a**, **Layout index b** and so on). In addition, you can see who uploaded the individual versions and when. This section also tells you when the distribution note was sent to you and whether you have already downloaded a file.

As you can see, you can keep track of all the relevant details of your own downloads.

---

# Step 9: Downloading Data

There are two ways to download documents and other files from the Allplan Exchange Web web platform:

- You can use the download email (= distribution note) addressed to you or
- You can download the data directly from the Allplan Exchange Web web platform.

## Downloading data using the download email

Using the distribution note, you can only download the data that are directly addressed to you. If you want to download other data of a web project, you need to do this directly on the Allplan Exchange Web web platform (see the next section: "Downloading data directly as a project participant (on page 47)").



Dear Ms. Bettina Mertin,

Project-based download overview, click here:

**My Downloads** <sup>1</sup>

The following new files are ready to download:

- [Training Project - Layout Management 1 Floor plans and sections.pdf](#) @ 14-01-2017 10:57:31
- [Training Project - Layout Management 1 Floor plans and sections.zip](#) @ 14-01-2017 10:59:35
- [Training Project - Layout Management 2 Elevation and perspective views.pdf](#) @ 14-01-2017 10:57:36
- [Training Project - Layout Management 2 Elevation and perspective views.zip](#) @ 14-01-2017 10:59:43
- [Training Project - Layout Management 3 General arrangement drawing.pdf](#) @ 14-01-2017 10:57:41
- [Training Project - Layout Management 3 General arrangement drawing.zip](#) @ 14-01-2017 10:59:48
- [Training Project - Layout Management 4 Reinforcement drawing.pdf](#) @ 14-01-2017 10:57:45
- [Training Project - Layout Management 4 Reinforcement drawing.zip](#) @ 14-01-2017 10:59:53

Sincerely,  
Bettina Mertin  
E-Mail: [bmertin@nemetschek.com](mailto:bmertin@nemetschek.com)

This message is automatically generated by Allplan Exchange (<https://exchange.allplan.com>)  
Allplan Exchange is a service of the Nemetschek Allplan Group.  
If you no longer wish to receive these mails, please contact [support@nemetschek.de](mailto:support@nemetschek.de)

**Note:** Although you can forward the distribution note to another person, this person requires the login details of the original recipient in order to download the data.

## To download data using the distribution note (= download email)

➡ You have received a distribution note by email.

- 1 Open the distribution note (= download email) in the email program installed on your computer.
- 2 Click the My Downloads <sup>1</sup> link in the distribution note.

The web browser starts and Allplan Exchange Web opens.

**Note:** As an alternative, you can download individual files directly by clicking the file name in the overview **2**.

- 3 *Only if you are currently not logged in to the Allplan Exchange Web web platform:*

Type in your email address and password and click **Sign in**.

The **My Downloads** page of the Allplan Exchange Web web platform opens automatically.

- 4 Continue as described in Downloading data directly as a project participant (on page 47). Start with step 4.

## Downloading data directly as a project participant



As a normal project participant, you usually have the **DOWNLOAD** project access right for the relevant Allplan Exchange web project. In this case, you can access *only the documents and files that are addressed to you*.

The screenshot displays the 'My Downloads' section of the Allplan Exchange Web platform. At the top, the 'Project' dropdown is set to 'Training Project - Layout Management'. The table below lists the following files:

File name	Layout number	Layout name	File type	Layout index	Notification date
Training Project - Layout Management_1_Floor plans and sections.pdf	1	1_Floor plans and sections	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_1_Floor plans and sections.zip	1	1_Floor plans and sections	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_2_Elevation and perspective...	2	2_Elevation and perspective views	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_2_Elevation and perspective...	2	2_Elevation and perspective views	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_3_General arrangement dra...	3	3_General arrangement drawing	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_3_General arrangement dra...	3	3_General arrangement drawing	zip	No Index Spec...	2 minutes ago
Training Project - Layout Management_4_Reinforcement drawing.pdf	4	4_Reinforcement drawing	pdf	No Index Spec...	2 minutes ago
Training Project - Layout Management_4_Reinforcement drawing.zip	4	4_Reinforcement drawing	zip	No Index Spec...	2 minutes ago

At the bottom of the page, there are links for 'News', 'FAQ', 'Imprint', 'Privacy Policy', 'Terms of Use', and 'Allplan Connect'. The footer also includes the language selection (English (United States)) and the copyright notice: © Nemetschek Allplan Deutschland GmbH.

## To download data directly from Allplan Exchange Web (as a project participant)

- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
  - You have access rights for the relevant Allplan Exchange web project (see "Overview of roles and access rights (on page 5)" table).
- 1 *Only if you belong to several organizations:*  
Select the organization ❶ that contains the relevant project.
  - 2 *Only if you are involved in several web projects:*  
Select the relevant Allplan Exchange web project.  
  
Click the relevant project in the Project ❷ list box.  
  
Or, on the home page of Allplan Exchange Web:  
  
Click the relevant project in My Projects.
  - 3 Click  My Downloads ❸ on the navigation bar.  
  
The overview ❹ shows the latest version of the uploaded documents of the selected web project that are currently *available to you*.
  - 4 *If you want to download the latest version of one of these documents:*  
Click the document ❺.  
  
Or:  
  
*If you want to download the latest version of several documents:*  
Choose the documents you want to download by selecting the corresponding check boxes in the first column ❻. Then click Download or Download (zip) ❼.
- Or:
- If you want to download an earlier version of one of these documents:*  
Click  Document - Details ❽. The Document - Details form is

displayed. Select the **File versions** section and click the required version of the document.

- 5 Another dialog box opens. Specify whether you want to open the file or save it on the hard disk of your computer.

## Downloading data directly as the project administrator

If you are the administrator of an Allplan Exchange web project or if you have been given the **MANAGE** or **DISTRIBUTE** project access right, you can access *all* the documents and files currently saved for this project on the **Allplan Exchange Web** web platform.

**ALLPLAN EXCHANGE** Free Space 1.9 GB Nemetschek Allplan Dokumente 1 Nemetschek

Project Training Project - Layout Management Print / Export

**All Documents - List**

File name	Layout number	Layout name	File type	Index	Upload date
Training Project - Layout Management_1_Floor plans and sections.pdf	1	1_Floor plans and sections	pdf	No Index Specified	14.01.2017
Training Project - Layout Management_1_Floor plans and sections.zip	1	1_Floor plans and sections	zip	No Index Specified	14.01.2017
Training Project - Layout Management_2_Elevation and perspective views.pdf	2	2_Elevation and perspective...	pdf	No Index Specified	14.10.2014
Training Project - Layout Management_2_Elevation and perspective views.zip	2	2_Elevation and perspective...	zip	No Index Specified	14.01.2017
Training Project - Layout Management_3_General arrangement drawing.pdf	3	3_General arrangement dra...	pdf	No Index Specified	14.01.2017
Training Project - Layout Management_3_General arrangement drawing.zip	3	3_General arrangement dra...	zip	No Index Specified	14.01.2017
Training Project - Layout Management_4_Reinforcement drawing.pdf	4	4_Reinforcement drawing	pdf	No Index Specified	14.10.2014
Training Project - Layout Management_4_Reinforcement drawing.zip	4	4_Reinforcement drawing	zip	No Index Specified	14.10.2014

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English (United States)



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## To download data directly from Allplan Exchange Web (as the project administrator)

- You have logged in to Allplan Exchange Web (exchange.allplan.com) using the web browser (see "Logging in directly to the web platform Allplan Exchange Web (on page 15)").
- You have an organization role in the relevant Allplan Exchange organization (see "Overview of roles and access rights (on page 5)" table).
  - 1 *Only if you belong to several organizations:*  
Select the organization ❶ that contains the relevant project.
  - 2 *Only if you are involved in several web projects:*  
Select the relevant Allplan Exchange web project.  
  
Click the relevant project in the Project ❷ list box.  
  
Or, on the home page of Allplan Exchange Web:  
  
Click the relevant project in My Projects.
- 3 Click  Documents ❸ on the navigation bar.  
  
The overview ❹ shows the latest version of *all* the uploaded documents of the selected web project that are currently saved on the Allplan Exchange Web web platform.  
  
**Note:** You can only see the list of documents if you have the **MANAGE** or **DISTRIBUTE** project access right. If this is not so, you only have the **DOWNLOAD** project access right.
- 4 *If you want to download the latest version of one of these documents:*  
Click the document ❺.  
  
Or:  
  
*If you want to download the latest version of several documents:*  
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