



# Portal Usage Guide

Version 1.66

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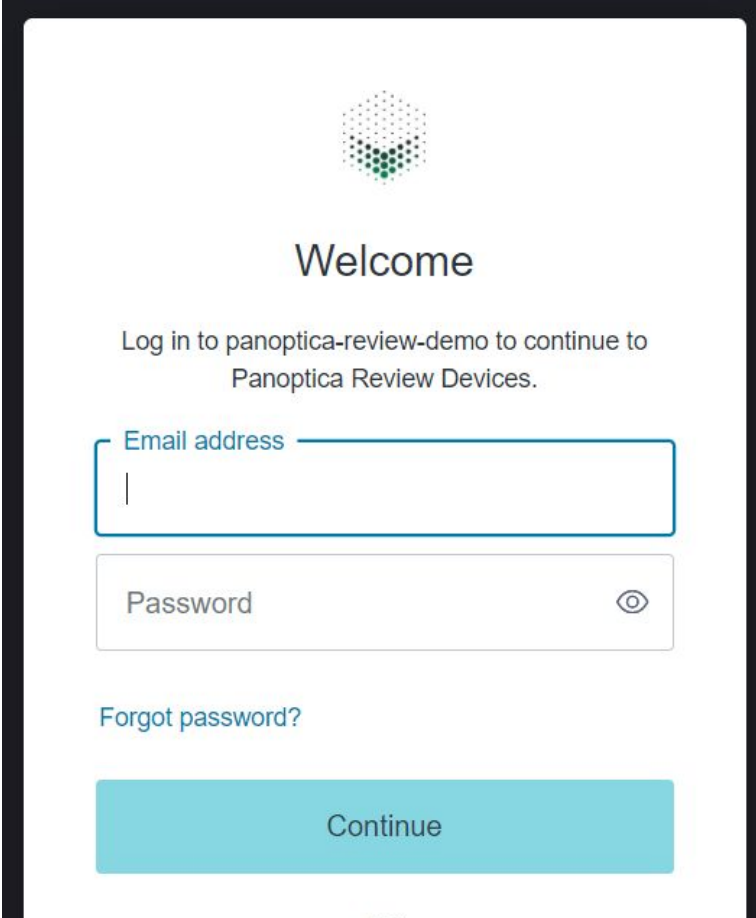
# Getting Started


1. Navigate to your deployed portal URL on a compatible web browser.

Recently-updated versions of these common web browsers should work properly:

- Chrome
- Firefox
- Microsoft Edge
- Safari
- Opera

2. The app will then prompt you to log in to the specified server. Enter your email address and password if you have a known Auth0 user account on this server:


A screenshot of a login interface for 'Panoptica Review Devices'. At the top is a green hexagonal logo made of dots. Below it is the word 'Welcome' in a large, dark font. Underneath is the instruction 'Log in to panoptica-review-demo to continue to Panoptica Review Devices.' in a smaller font. There are two input fields: the first is labeled 'Email address' and has a blue border; the second is labeled 'Password' and has a grey border with an eye icon on the right. Below the password field is a link that says 'Forgot password?'. At the bottom is a large teal button labeled 'Continue'. The entire form is enclosed in a white box with a black border.



## Welcome

Log in to panoptica-review-demo to continue to  
Panoptica Review Devices.

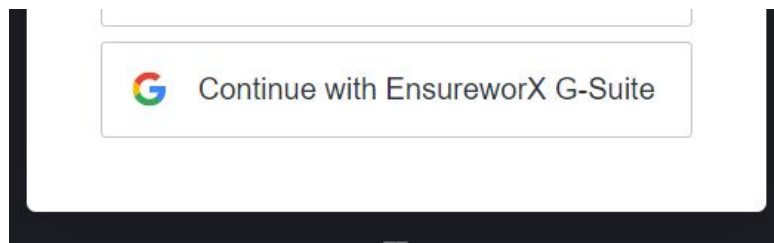
Email address

Password  

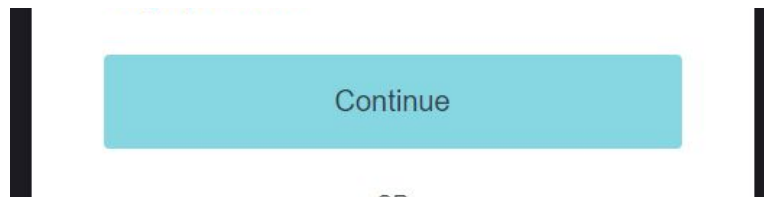
[Forgot password?](#)

[Continue](#)

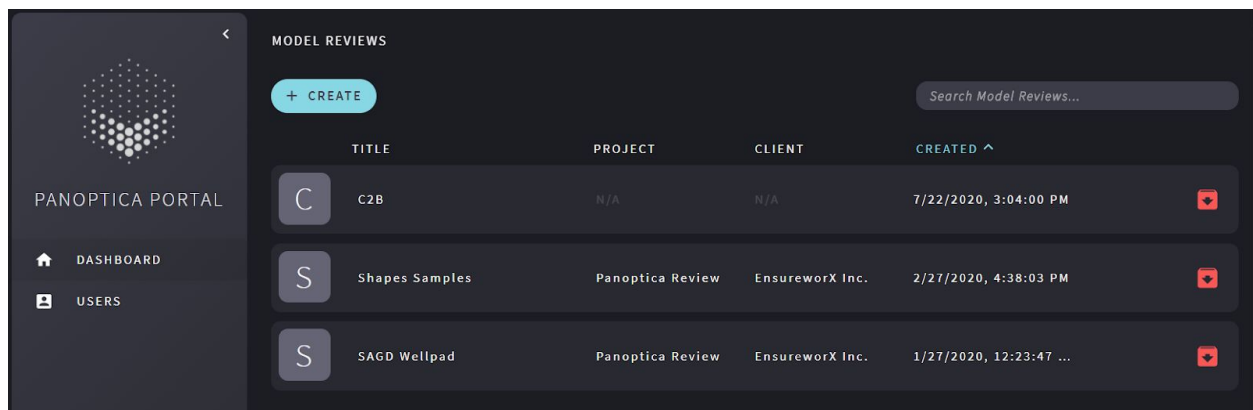
**Note** that the server may have additional ways to log in, such as using Google G Suite. Use the method that your company has recommended to you.




3. Proceed through the log in steps. If using an Auth0 username and password, press CONTINUE:

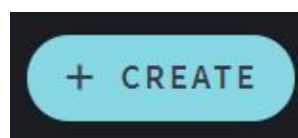


4. After waiting a moment to be logged in, you will be redirected to the Dashboard. This is where you can create a model review.

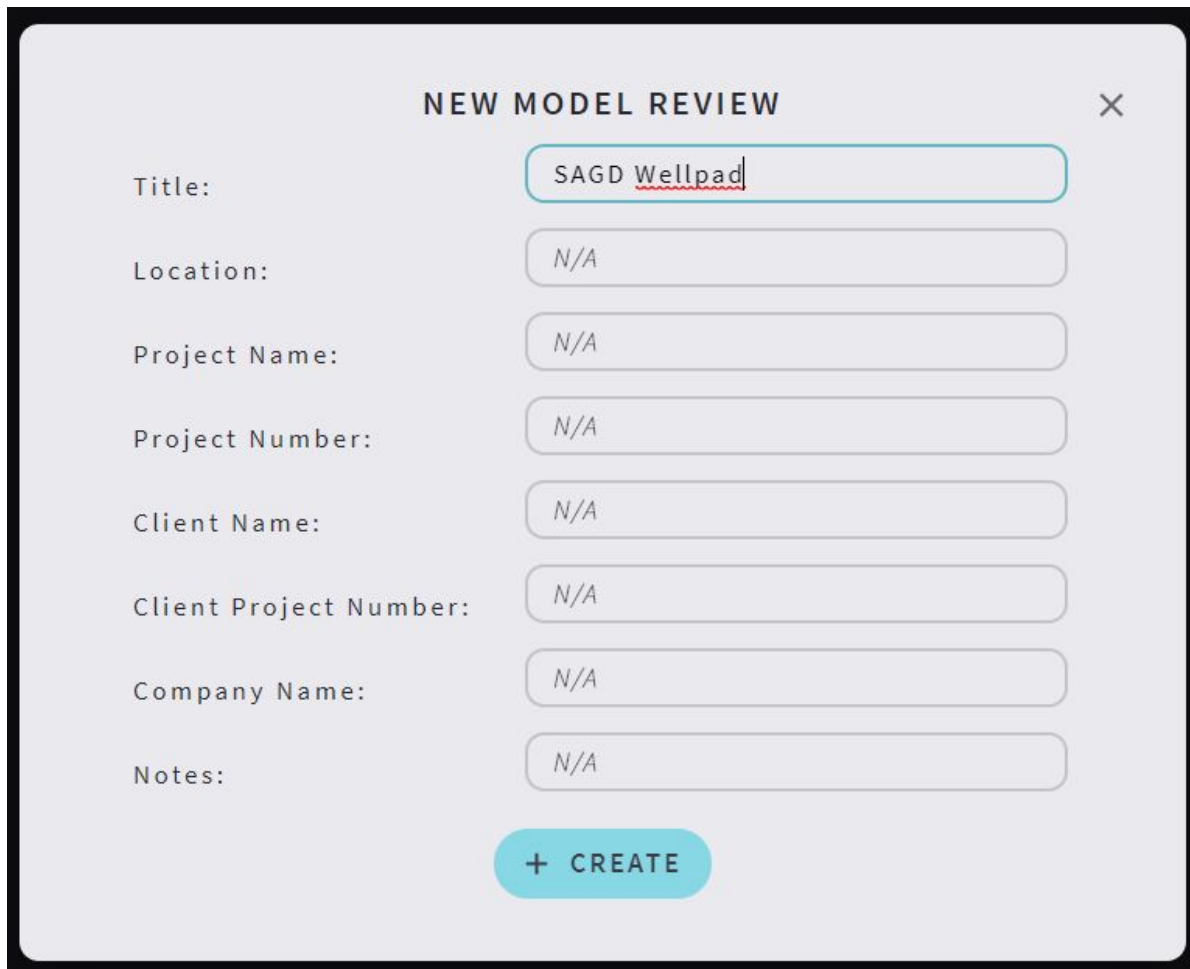


**Note:** Model reviews can be **archived** by pressing the ARCHIVE button, denoted by 

5. Click + CREATE to create a new model review.



6. A pop-up will appear and you will be prompted to complete all the necessary fields.

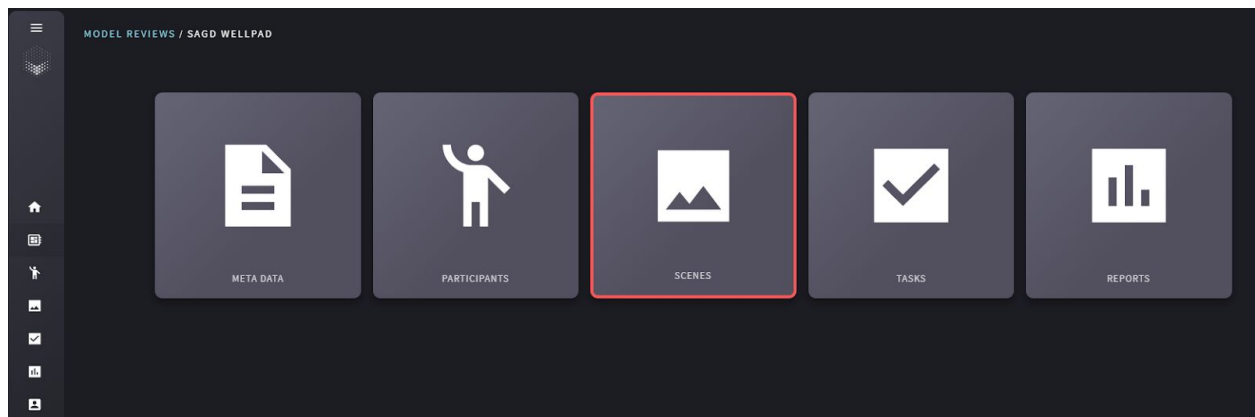


The screenshot shows a light gray pop-up window titled "NEW MODEL REVIEW" with a close button (X) in the top right corner. The form contains the following fields:

- Title: SAGD Wellpad
- Location: N/A
- Project Name: N/A
- Project Number: N/A
- Client Name: N/A
- Client Project Number: N/A
- Company Name: N/A
- Notes: N/A

At the bottom of the form is a teal button with a plus sign and the text "+ CREATE".

7. Once you press + CREATE, you will be redirected to the model review's set-up page:



# Features

## Updating Model Review Details

The model review's details can be changed by selecting the META DATA tile and pressing the edit button:



META DATA

×

Model Review Title:

SAGD Wellpad

Location:

N/A

Project Name:

Panoptica Review

Project Number:

N/A

Client Name:

EnsureworX Inc.

Client Project Number:


N/A

Company Name:

N/A

Notes:

N/A

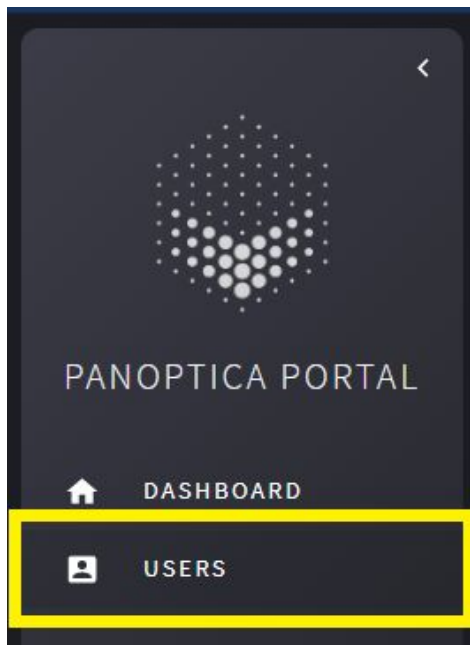


Click the save button  to update the fields.

## Users and Participants

### Users






The Users page allows you to manage **all users** within your organization. To access the Users page, click the USERS button in the side menu:



USERS

+ USER

Search Users...

	NAME ↓	COMPANY	
	Demo 1	EnsureworX	▼
	Demo 10	EnsureworX	▼
	Demo 2	EnsureworX	▼
	Demo 3	EnsureworX	▼
	Demo 4	EnsureworX	▼

To **create a user**, click the + USER button to display the create user pop-up:

+ USER

NEW USER


×

FIRST NAME:

LAST NAME:

COMPANY:

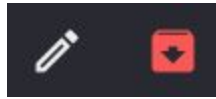
EMAIL:



+ CREATE

Fill out all the necessary fields outlined in red, and choose the user's avatar colour by selecting the colour button. When you are ready, press the + CREATE button to create the user. The user will be added to the list.

To **edit the user's information** or **archive the user entirely**, click the user's name to expand the tile and use these buttons:



Once you have created all the users in your organization, you can **add them as participants to your model review**. You are required to add users to the model review as participants in order for them to access the model review.

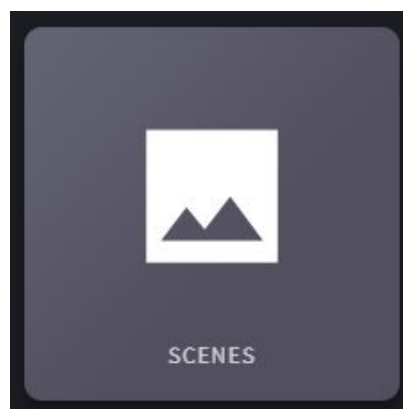
## Participants

The Participants page contains **the participants of your model review**. This page only allows you to add or remove participants from your model review. If you would like to **edit or archive a user**, you must do this through the Users page. You can learn more about the Participants page below in the [Adding Participants](#) section.

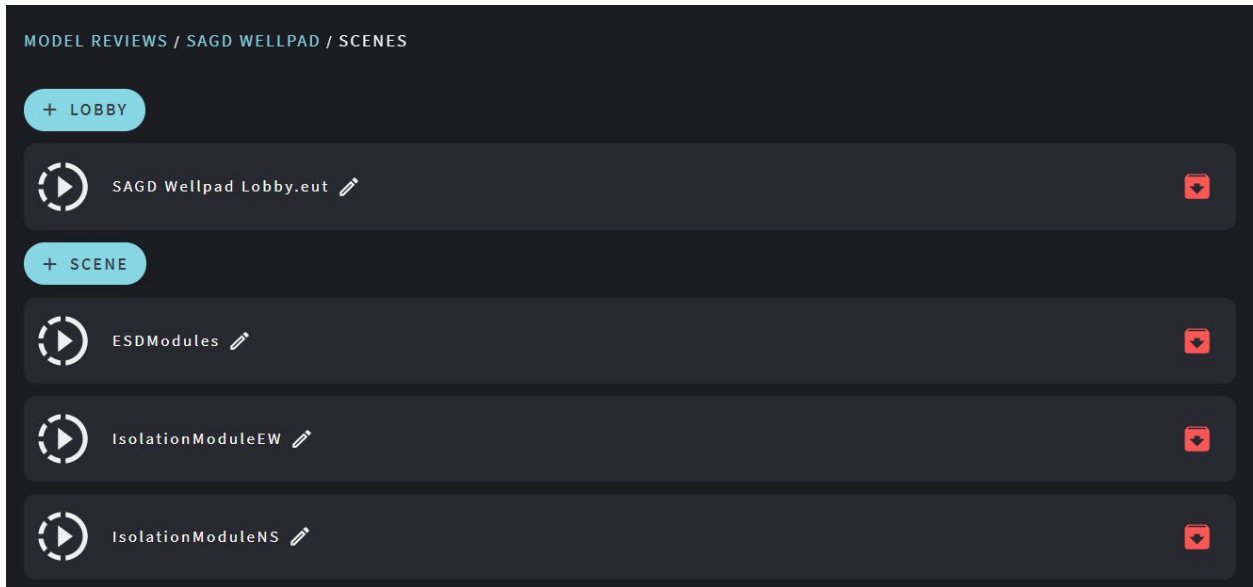
## Scenes

Each model review is sectioned into smaller segments referred to as **scenes**. Scenes should be sectioned using the Navisworks plugin, prior to being added to the Portal. See the Panoptica **Navisworks Plugin Usage Guide** to understand this process.

To access your model review's scenes, press the SCENES tile.







## Scene Format

Panoptica Review uses a special file format for scenes called **Eutocius**, abbreviated to **.eut**. Panoptica's Navisworks Plugin directly converts scene sections into .eut files, which can be quickly uploaded onto the Portal.

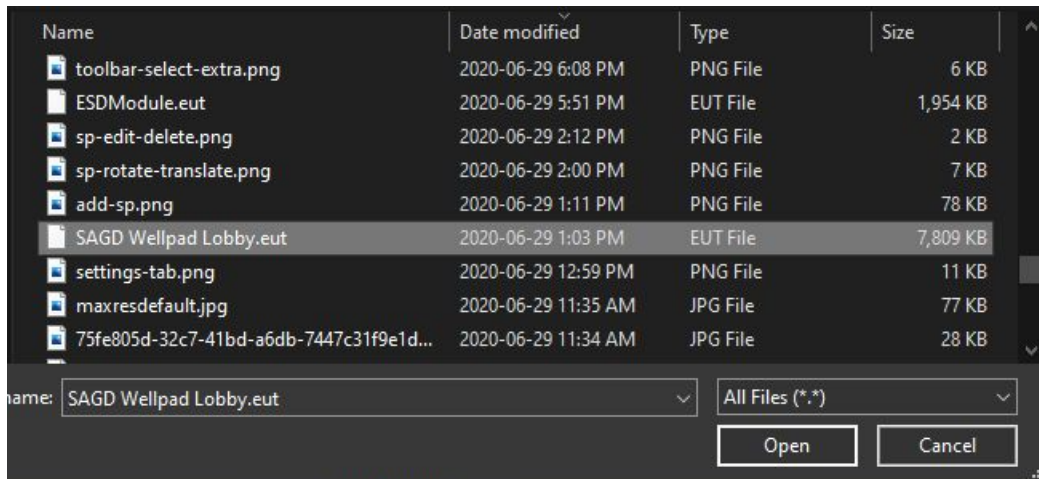
Alternatively, if a conversion server is running for your Portal, **any Navisworks-compatible 3D model** can be uploaded. These files are converted into .eut files by the conversion server. Note that uploading .eut files directly (obtained by using the Navisworks plugin) is **substantially faster** than uploading a model to be converted by the conversion server.


## Adding Scenes

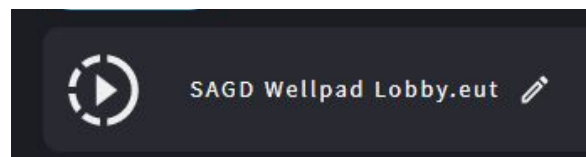
A **Lobby** is a special scene that is loaded automatically upon joining the model review. This is useful to show a miniaturized version of the entire project featured in the model review for context, but anything (or nothing) can be uploaded as a lobby.

To **add a lobby** to your model review, press the + LOBBY button, select your lobby file, and press OPEN:



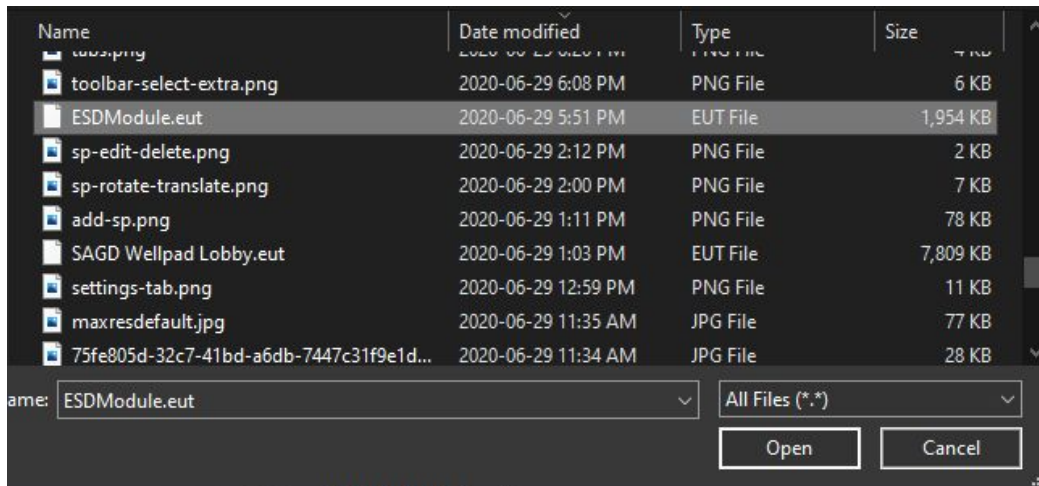


The lobby will be ready to set up when the play button  appears by the lobby name:

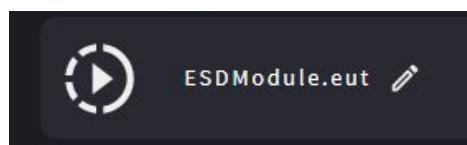


To **add a scene** to your model review, press the + SCENE button, select your scene file, and press **OPEN**.

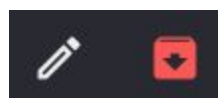




The scene will be ready to set up when the PLAY button  appears by the scene name:




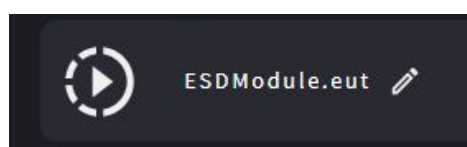
You can **edit the scene name** or **archive the scene entirely** by using these buttons:



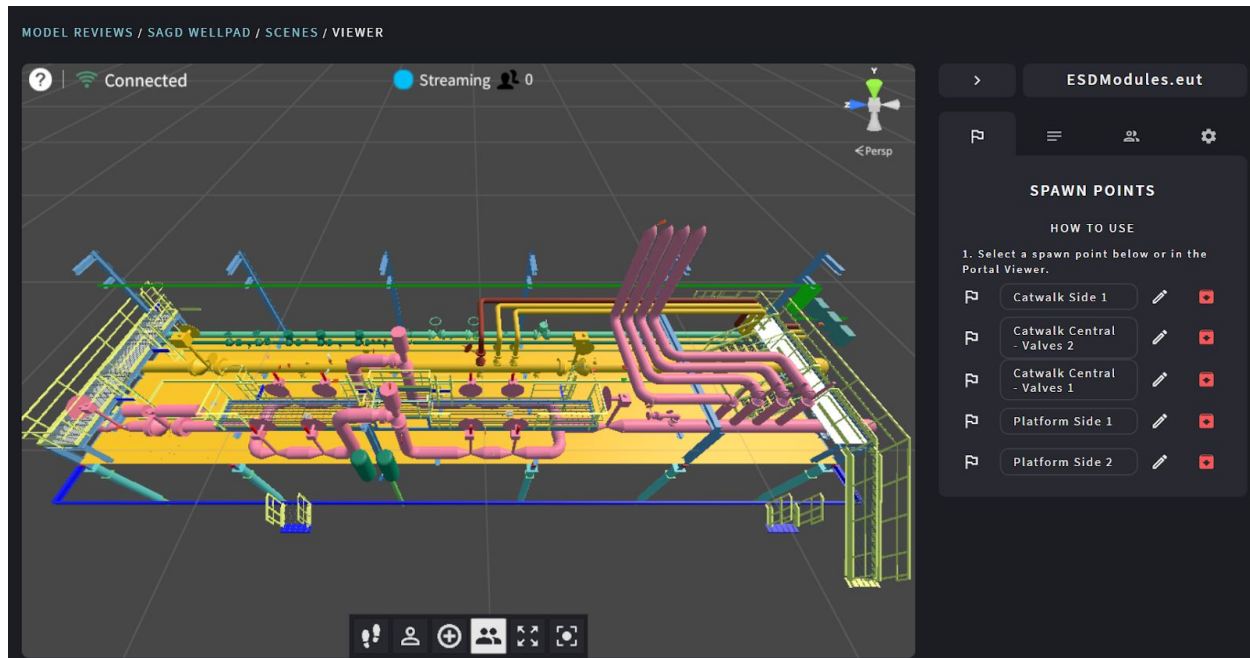
## Scene Editor User Interface

### Using the Scene Editor

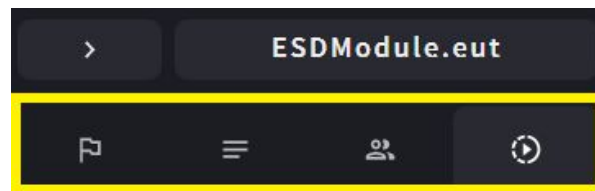
When you are ready to set up your scene, press the play button .





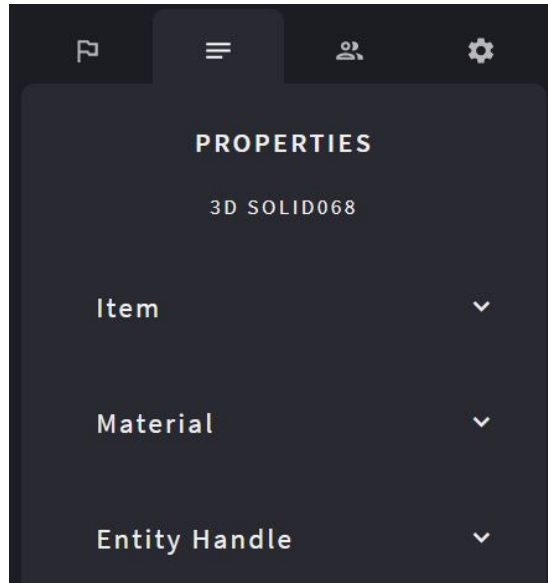
It will take you to the scene's editor:




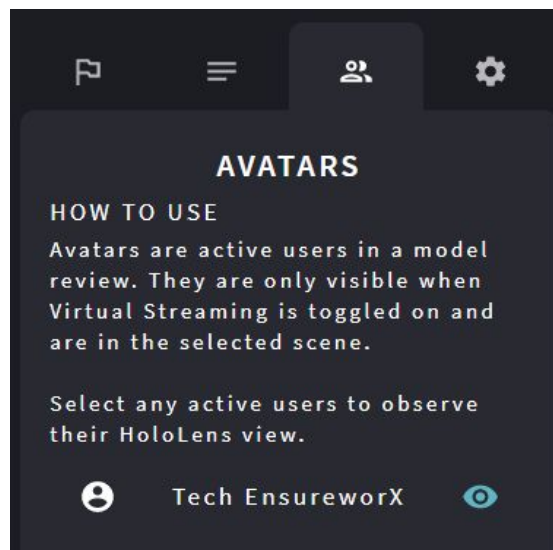
On the right side of the screen there are **four tabs**:




1.  **Spawn Points:** displays all spawn points in the scene. See the section below for more information.
2.  **Properties:** when you select an object in the scene, all BIM data will be displayed in this tab.



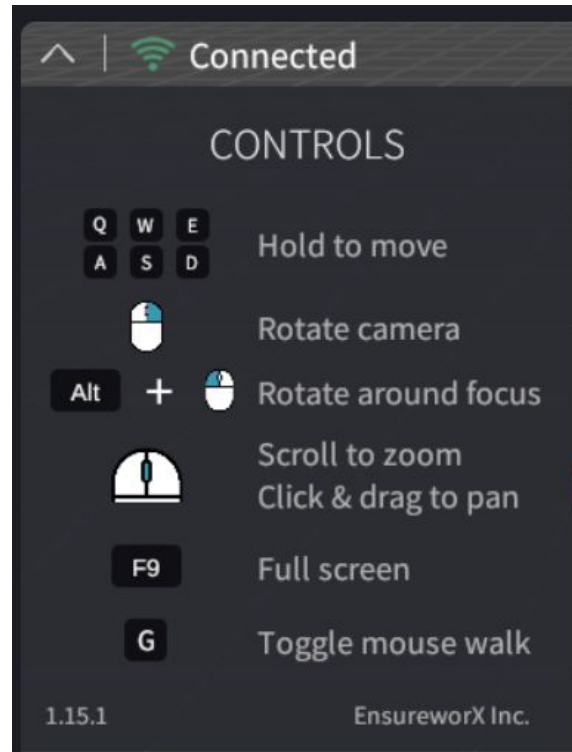
3.  **Avatars:** you can watch what participants in the scene are seeing. Select their name from the list to observe their first-person view.




4.  **Scene Settings:** you can set the scene's rotation and scale ratio. See the section below for more information.

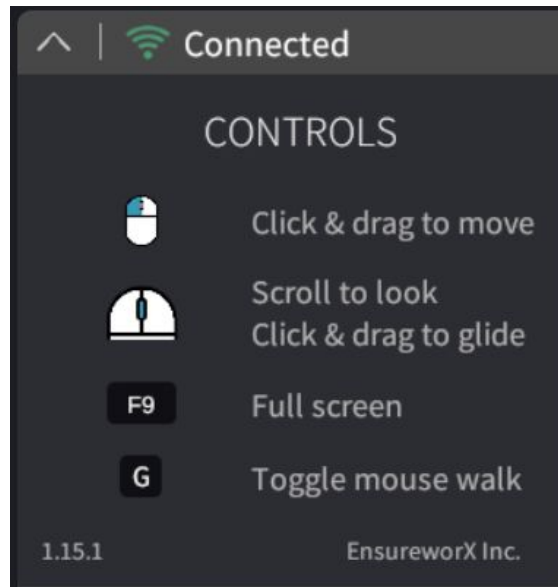
## Classic Movement

By default, Classic Movement is the default mode. The **G key** can be pressed to switch between classic movement and mouse walk movement. Classic movement mode uses a combination of mouse and keyboard buttons to move.



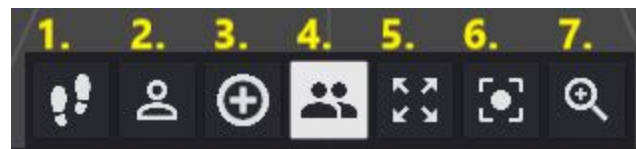
## Mouse Walk

The **G key** can be pressed to switch to mouse walk. You should see the  icon on your mouse. This movement mode can be used to easily move around the scene by left-clicking and dragging your mouse.



## Toolbar

The Scene editor has a toolbar that makes it easier to navigate and set up the scene:



1. **Toggle MouseWalk (G)**: see above on how to use MouseWalk.
2. **Toggle Avatar Highlighting (H)**: this will highlight any active avatar in the scene.
3. **Create Spawn Point (P)**: this will create a spawn point in the scene.
4. **Toggle Virtual Streaming (V)**: this will hide or display any active avatars in the scene.
5. **Fit To Screen (M)**: this will move the camera to display the entire scene.
6. **Reset Camera (C)**: this will reset the camera's display to the default view.

If you **select an object** in the scene editor, the toolbar will display another option:

7. **Focus on selected object (F)**: this will make the camera zoom in to the selected object.

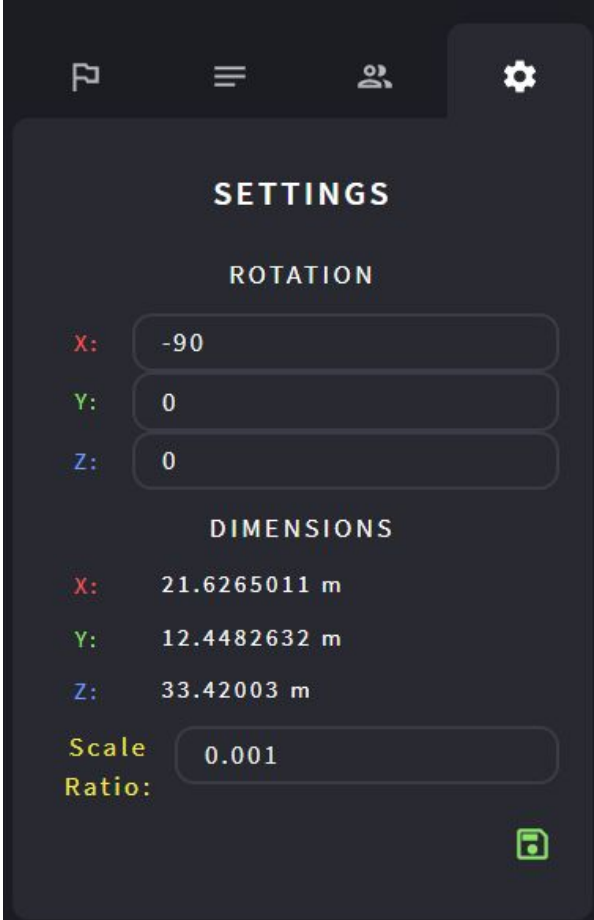
## Setting Up Scenes in the Scene Editor

Setting up scenes requires two main steps:

1. Setting the scene dimensions and rotation
2. Creating spawn points

### 1. Setting the scene dimensions and rotation

The scene's rotation and scale ratio can be adjusted in the **Settings** tab. This can be used to ensure that the scene will be in 1:1 scale during the model review. On the right side, press the PLAY button to display the scene's settings:



The screenshot shows the 'SETTINGS' panel in a dark-themed interface. At the top, there are four icons: a flag, a hamburger menu, a person, and a gear. The 'SETTINGS' title is centered. Below it, the 'ROTATION' section has three input fields: 'X:' with the value '-90', 'Y:' with '0', and 'Z:' with '0'. The 'DIMENSIONS' section follows, with three input fields: 'X:' with '21.6265011 m', 'Y:' with '12.4482632 m', and 'Z:' with '33.42003 m'. Below these is a 'Scale Ratio:' label and an input field with the value '0.001'. A green save icon (a floppy disk) is located at the bottom right of the panel.

The scene will transform in real time as you adjust the **x**, **y** and **z rotation** and **scale ratio**.

Press the save button  to update the changes.

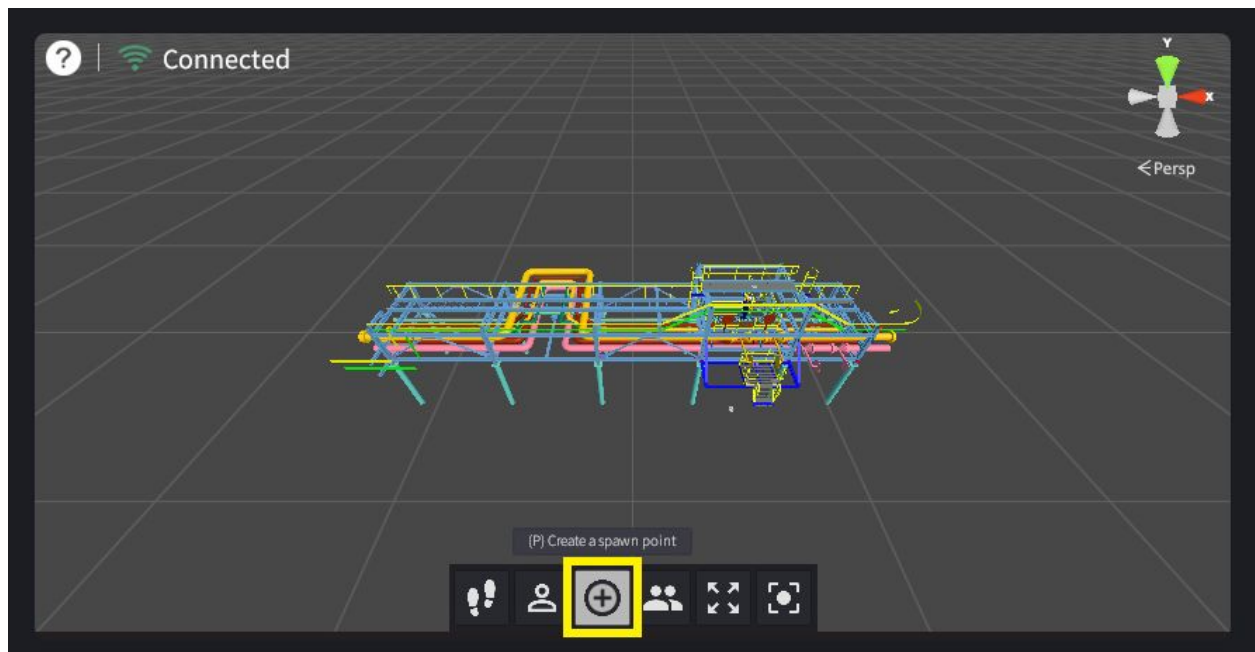


## 2. Adding spawn points

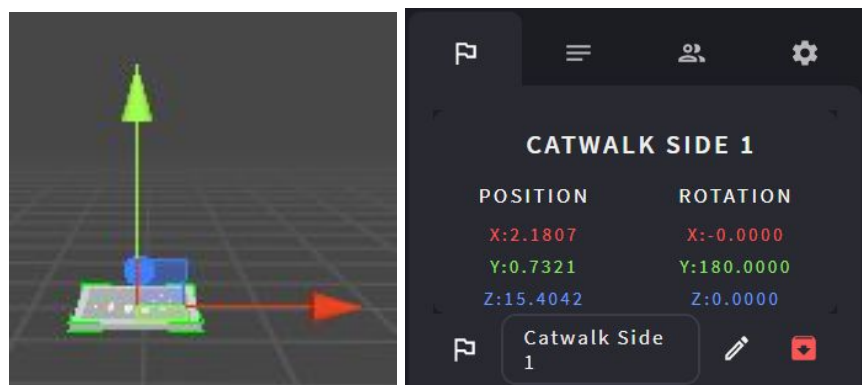
**Spawn Points** are different locations within a scene that you can instantly move to. Set up spawn points around locations of interest for your model review.

Adding spawn points to a scene

To **add a spawn point**, click the  button in the scene viewer:




A spawn point will appear in the **scene viewer** and in the **Spawn Points tab**:

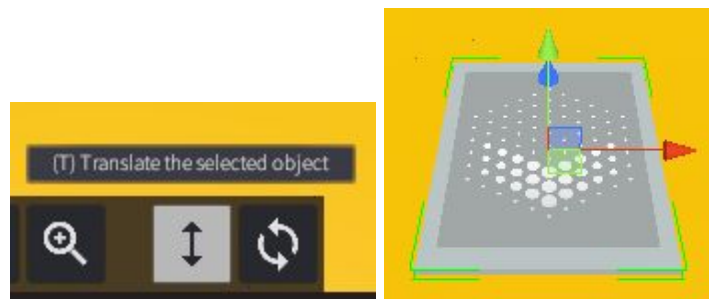



**Note:** you should try to place spawn points roughly 6 feet in front of the scene.

To **move** and **rotate spawn points**, click on the spawn point through the viewer or via the spawn points tab. The toolbar will display buttons to **move the object (T)** or **rotate the object (R)**:



To **move the spawn point**, ensure the  button is selected, and click and drag the **x**, **y** or **z** axis around the spawn point to translate it.



To **rotate the spawn point**, ensure the  button is selected, and click and drag the **x**, **y** or **z** rings to rotate the spawn point.



You can **edit** the spawn point name or **archive** the spawn point entirely using these buttons:



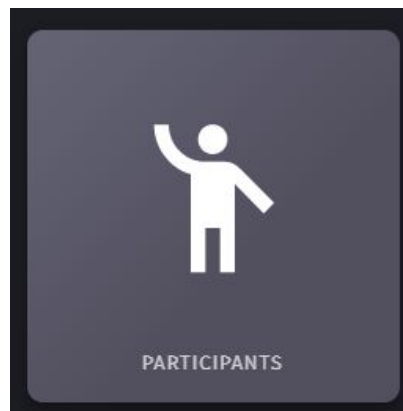
Once you have added all desired spawn points, you can add participants to your model review and create tasks.

## Lobby origin point

When a lobby is uploaded, the Portal automatically generates a special type of spawn point, known as an **origin point**. The origin point **cannot be edited or archived**, but it can be **moved** to a desired location. Participants will see the lobby from the origin point when entering the model review for the first time.

## Adding Participants

You can add participants to your model review by pressing the PARTICIPANTS tile:



MODEL REVIEWS / SAGD WELLPAD / PARTICIPANTS

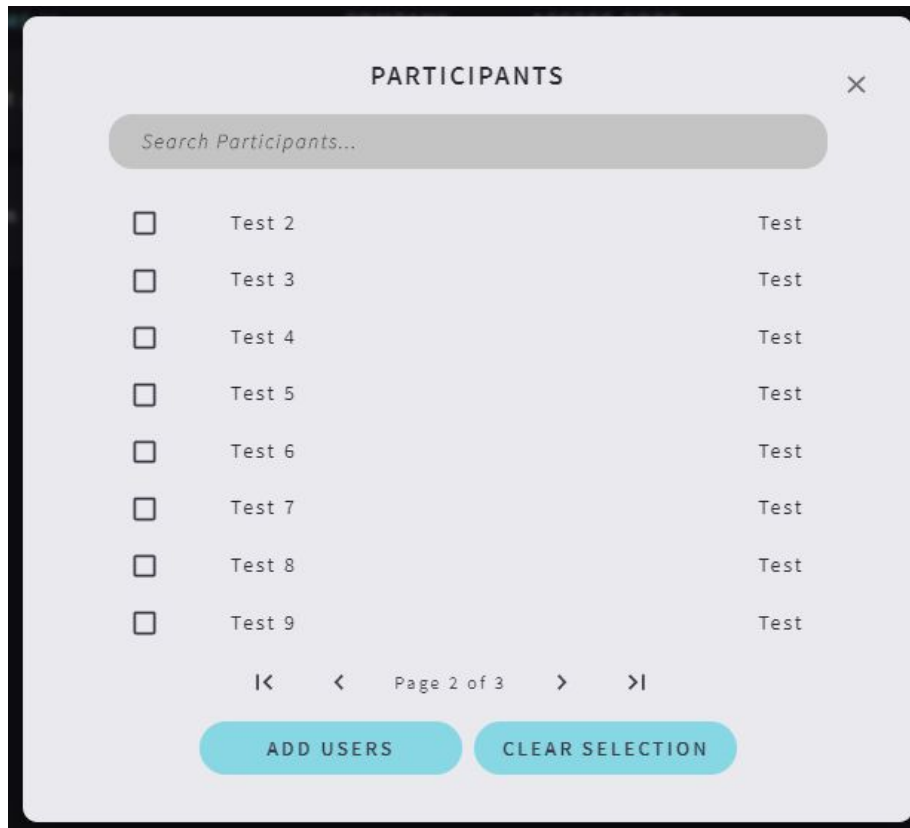
+ PARTICIPANT

ROOMS


Search Users...

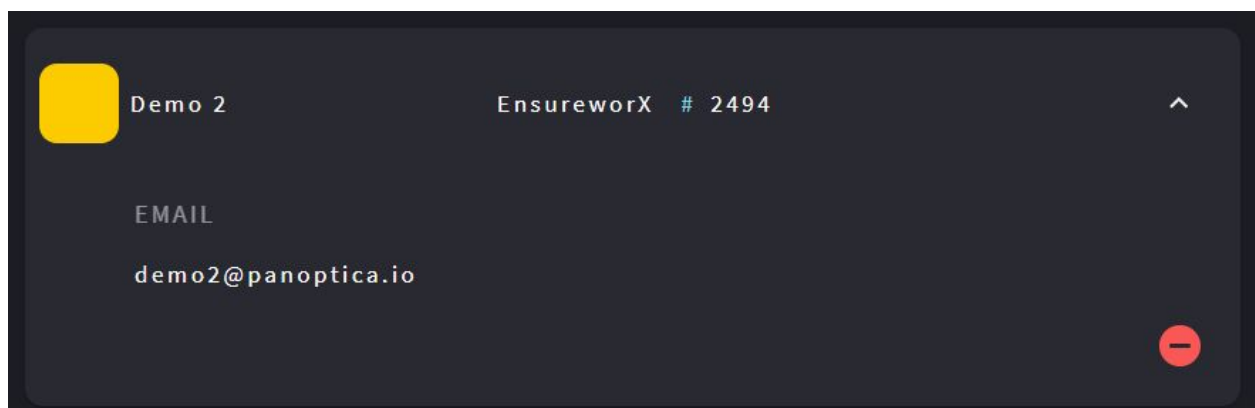
NAME	COMPANY ^	ACCESS CODE	
<div></div> <div>Demo 2</div>	EnsureworX	# 2494	▼
<div></div> <div>Demo 7</div>	EnsureworX	# 3283	▼
<div></div> <div>Demo 4</div>	EnsureworX	# 8845	▼
<div></div> <div>Demo 1</div>	EnsureworX	# 5330	▼

To **add a new participant** to the model review, click the + PARTICIPANT button to open up a pop up of all users:



Check off all users you wish to add to the model review as participants and press the ADD USERS button. The participant list should be updated.

To **remove a participant**, expand the selected user and press  the button. The user should be removed from the participant list.

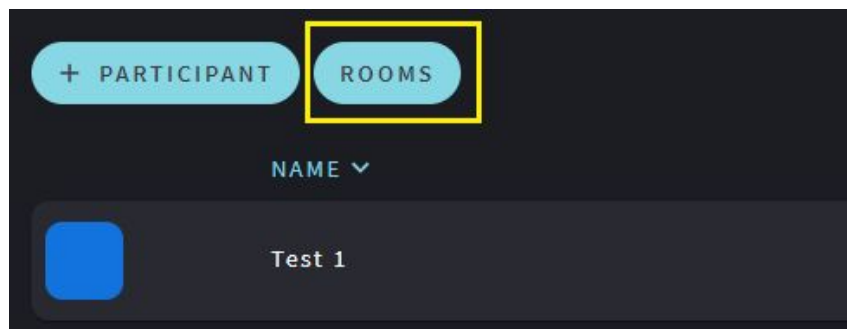


## Rooms

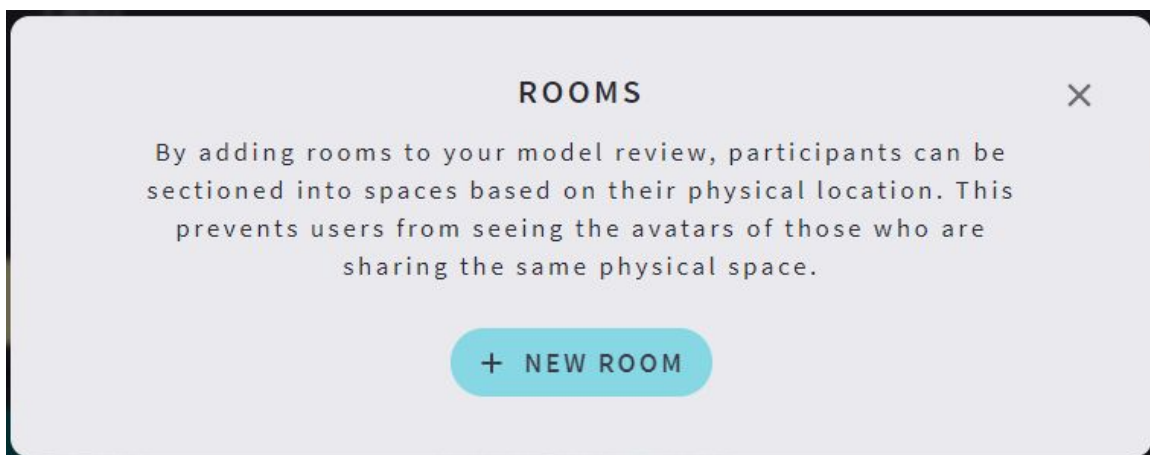
**Rooms** are spaces you can create to section participants based on their physical location. This will prevent participants from seeing the avatars of those who are sharing the same physical space.

Participants in the same room *will not* see each other's avatars, whereas participants in different rooms *will* see each other's avatars.

To **manage rooms**, press the ROOMS button on the participants page:




This will show the Rooms pop-up:



Click the + NEW ROOM button to create a new room:



Enter a name for the room in the field, then click the save button 

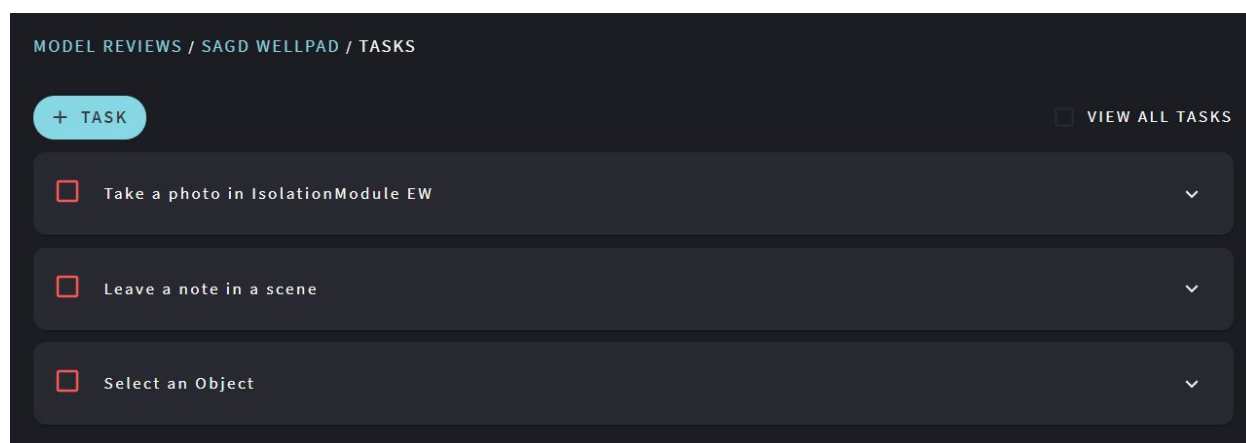
A horizontal input field with a light gray background and a rounded rectangle. Inside the field, the text "Room name..." is displayed in a light gray font. To the right of the input field, there are two small icons: a yellow circle with a black 'x' and a green square with a white document icon.

You can **edit the room name** or **archive the room entirely** through these buttons:

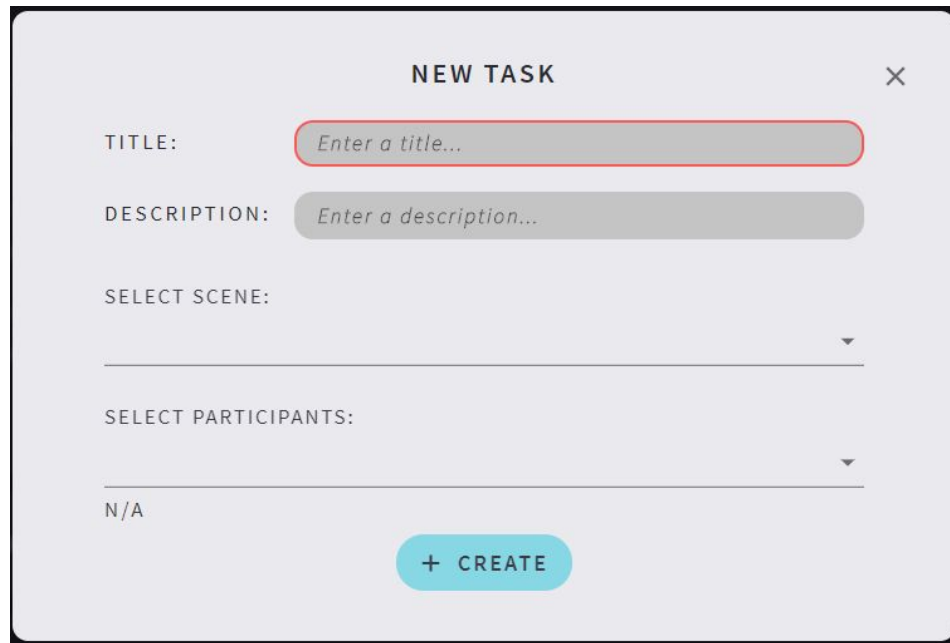
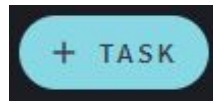


## Tasks

Tasks can be used as a way to keep participants in the model review accountable for their review responsibilities. You can add tasks and assign them based on a scene or to a participant. To access the tasks page, press the TASKS tile.



To **add a new task**, press the + TASK button and fill out all the required fields:



The image shows a 'NEW TASK' modal window. It has a title bar with 'NEW TASK' and a close button (X). Below the title bar are four input fields: 'TITLE:' with a placeholder 'Enter a title...', 'DESCRIPTION:' with a placeholder 'Enter a description...', 'SELECT SCENE:' with a dropdown arrow, and 'SELECT PARTICIPANTS:' with a dropdown arrow. Below these fields is the text 'N/A'. At the bottom center is a blue button with a white plus sign and the text '+ CREATE'.

You have the option to assign a task to an existing scene or participant:



The image shows a form with two dropdown menus. The first dropdown is labeled 'SELECT SCENE:' and has the text 'WellpairEndModuleEW' selected. The second dropdown is labeled 'SELECT PARTICIPANTS:' and has the text 'Tech EnsureworX' selected. Below the second dropdown is a red circle with a white 'X' and a red minus sign.

Press the + CREATE button to save the new task.

To **edit** or **archive** a task, you can use these buttons:



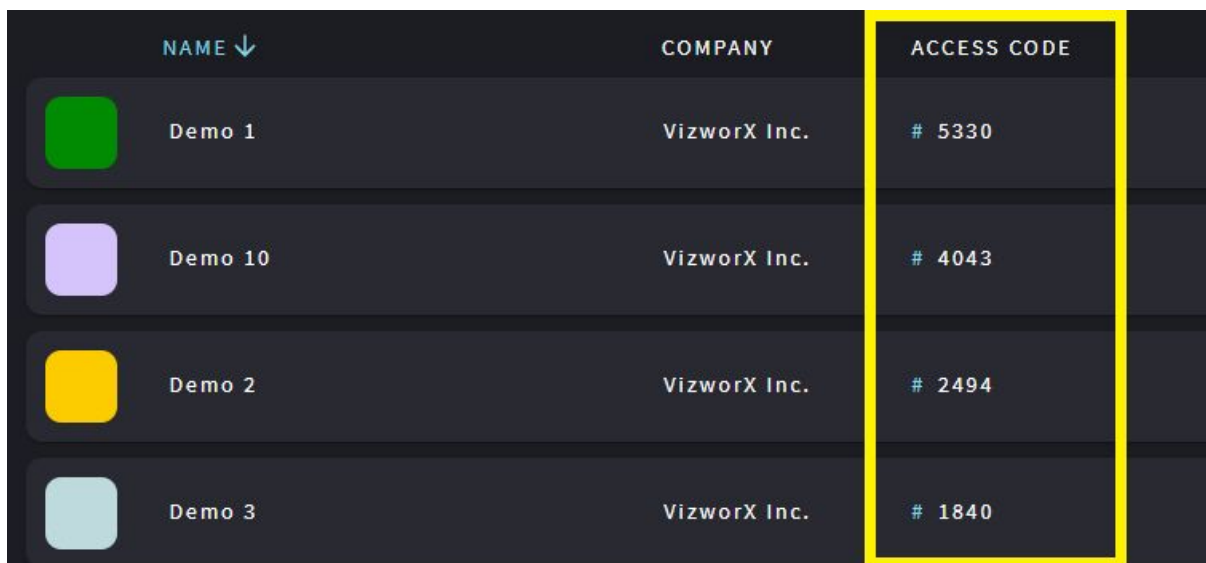
**Note:** tasks cannot be marked as complete in the Portal.

## Locking Model Reviews





You can make the sign in process easier for your participants by *locking* the model review on the Companion. This means the next time the Companion is opened, they won't be forced to sign in through Auth0. Instead, the Companion will show a list of participants and the user will be asked to enter their Access Code assigned to them from the Portal.

### On the Portal

First, add all your participants to your model review. Make note of the **access code beside the participant's name** - this is the code the participant will use to gain access to their Companion and HoloLens.



The screenshot shows a table with four columns: NAME, COMPANY, ACCESS CODE, and an unlabeled fourth column. The ACCESS CODE column is highlighted with a yellow border. The table contains four rows of participant data.

NAME ↓	COMPANY	ACCESS CODE	
 Demo 1	VizworX Inc.	# 5330	
 Demo 10	VizworX Inc.	# 4043	
 Demo 2	VizworX Inc.	# 2494	
 Demo 3	VizworX Inc.	# 1840	

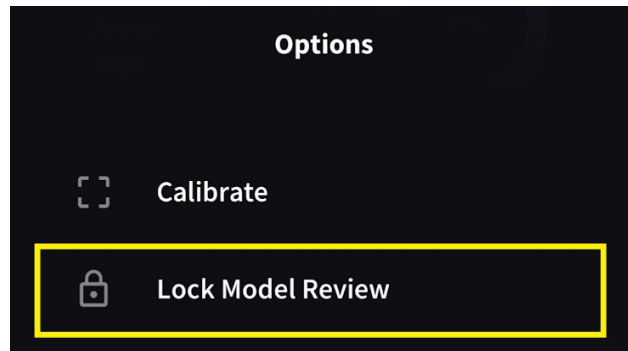
### Locking A Companion Device

Log onto the Companion device using your admin credentials. Information on how to set up your HoloLens and Companion can be found in the **“Getting Started - How to Start Running a Demo” section from the Panoptica Review - HoloLens and Companion Usage Guide.**

Once you successfully join your model review, you can lock the device to the model review.

To **lock a model review**, press the SETTINGS button in the Dashboard and select the LOCK MODEL REVIEW button. Once you press CONFIRM, the device will be locked to the model review.

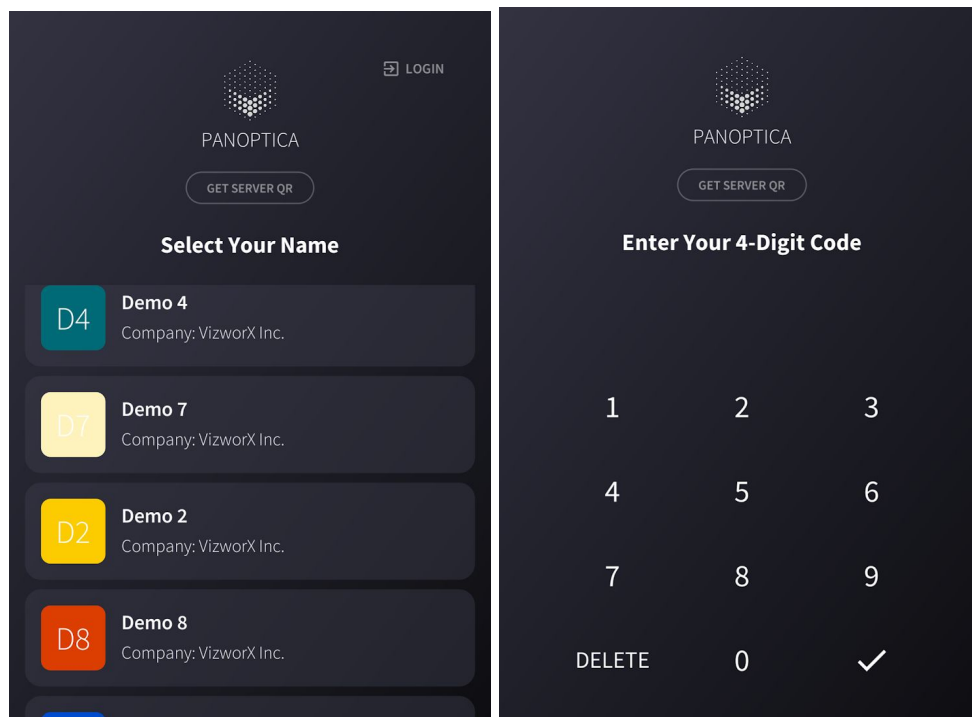




Once the companions are locked to the model review, they are ready to be used by participants.

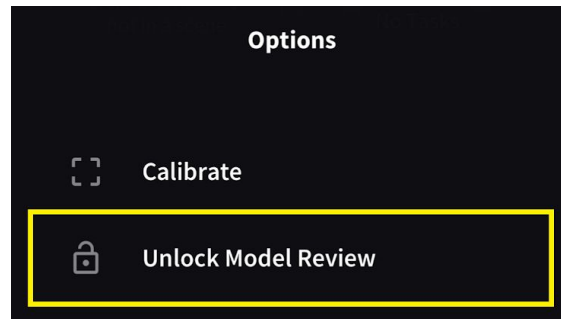
## Participants: Joining the Model Review

When a participant opens the Companion, they can choose their name from the list and log into the device using their access code:



Once they have gained access, they can pair their HoloLens and start the model review.

**Note:** You can unlock model reviews by pressing LOGIN and sign in with your credentials. To **unlock a model review**, press the SETTINGS button in the Dashboard and select the UNLOCK MODEL REVIEW button. Once you press CONFIRM, the device will no longer be locked to the model review.

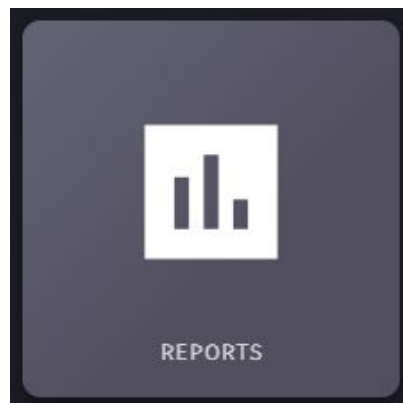


## Reports

Reports can be generated for each model review at any time. There are currently three kinds of reports:

- **Heatmap report:** a visualization of where participants were located, and for how long in a given scene
- **Notes report:** a detailed report of all notes and images taken in a given scene
- **Tasks report:** a detailed report of the model review's tasks and their status













You can access all reports in the model review by clicking the REPORTS tile.



MODEL REVIEWS / SAGD WELLPAD / REPORTS

+ REPORT

Search Reports...

	NAME	SCENE	TYPE	DATE ▾	
	Heatmap Report 	Walkway	Heatmap	5/5/2020, 3:15:05 PM	
	Notes Report 	N/A	Notes	5/5/2020, 11:01:41 ...	
	Heatmap Report 	ESDModules.eut	Heatmap	5/1/2020, 5:27:03 PM	
	Notes Report 	N/A	Notes	5/1/2020, 1:31:00 PM	

To **generate a new report**, press the + REPORT button to display the reports pop-up:



NEW REPORT

×

TITLE:

Enter a title...

SELECT REPORT TYPE:

☒

Heatmap reports create a detailed image of user interactions in a scene.

☐

Notes report create an organized document with notes of users in a scene.

☐

Tasks reports create a document which entails all tasks in a model review.

ASSIGN SCENE:

There are no scenes added to the report. Please add scenes or select a different report type.

START TIME:

yyyy-mm-dd --:-- --

END TIME:

yyyy-mm-dd --:-- --

TIME ZONE:

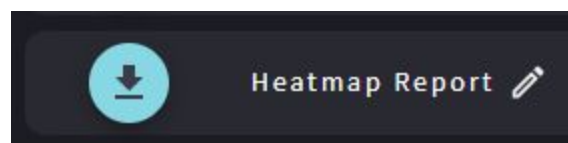
America/Edmonton (-06:00 MDT)

+ CREATE

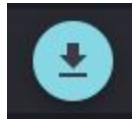
Select the **report type**, scene (heatmap and notes) and date range you want for your report and press the GENERATE REPORT button to start generating the report:



When the report is ready, the DOWNLOAD button should be displayed beside the report name:



To **download a report**, click the download button. A pdf of the report will be downloaded to your computer.



You can **edit** the report name or **archive** the report entirely using these buttons:

