MEZZOTEAM USE GUIDE

2023-06-16

Mezzoteam – une marque du Groupe Infopro Digital
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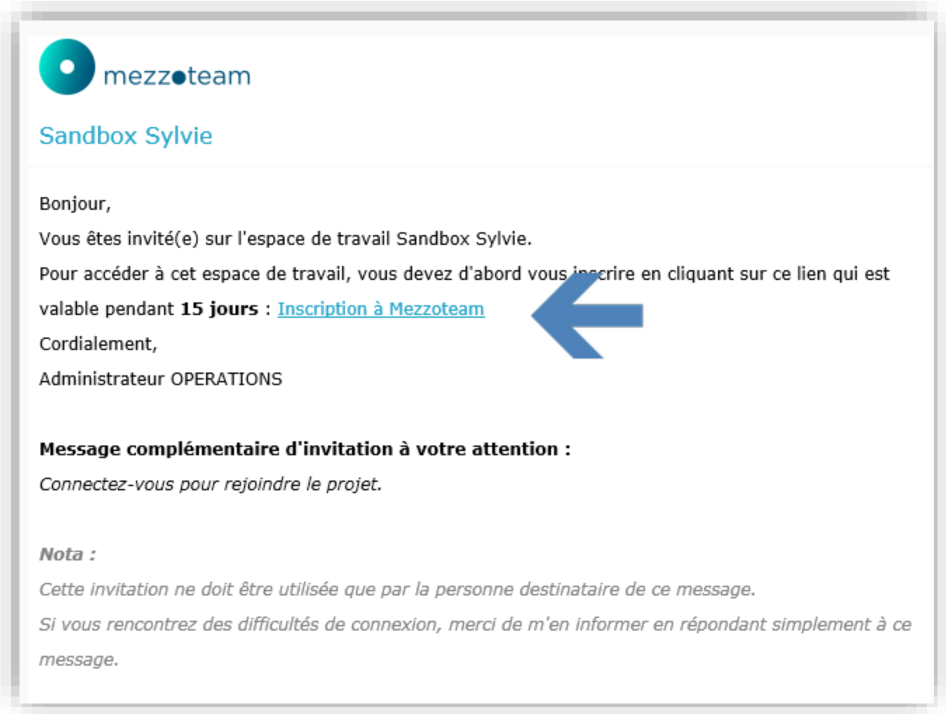
1. Login to Mezzoteam

1.1 Registering with Mezzoteam

You are invited to access a project on Mezzoteam for the first time.
You will receive an invitation e-mail from the following address: info@mezzoteam.com.


mezzoteam

Sandbox Sylvie

Bonjour,

Vous êtes invité(e) sur l'espace de travail Sandbox Sylvie.

Pour accéder à cet espace de travail, vous devez d'abord vous inscrire en cliquant sur ce lien qui est valable pendant **15 jours** : Inscription à Mezzoteam

Cordialement,

Administrateur OPERATIONS

Message complémentaire d'invitation à votre attention :

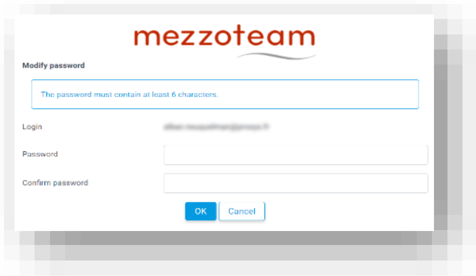
Connectez-vous pour rejoindre le projet.

Nota :

Cette invitation ne doit être utilisée que par la personne destinataire de ce message.

Si vous rencontrez des difficultés de connexion, merci de m'en informer en répondant simplement à ce message.

- Click on the link "**Sign up for Mezzoteam**" in the e-mail invitation you have received.
- Fill in the registration form with your professional details.
- Click on "**OK**".
- Choose your personal password and confirm it.
- Click on "**OK**".



Note: Working in some workspaces implies a high level of security:

The password must contain more than 12 characters

The password must contain at least three of the following elements: lowercase, uppercase, numbers, special characters.

Maximum number of incorrect password attempts before deactivation: 6

Duration of deactivation in this case: 15 minutes

The password must be changed at least once every 90 days

Time after which a password change warning is displayed: 30 days

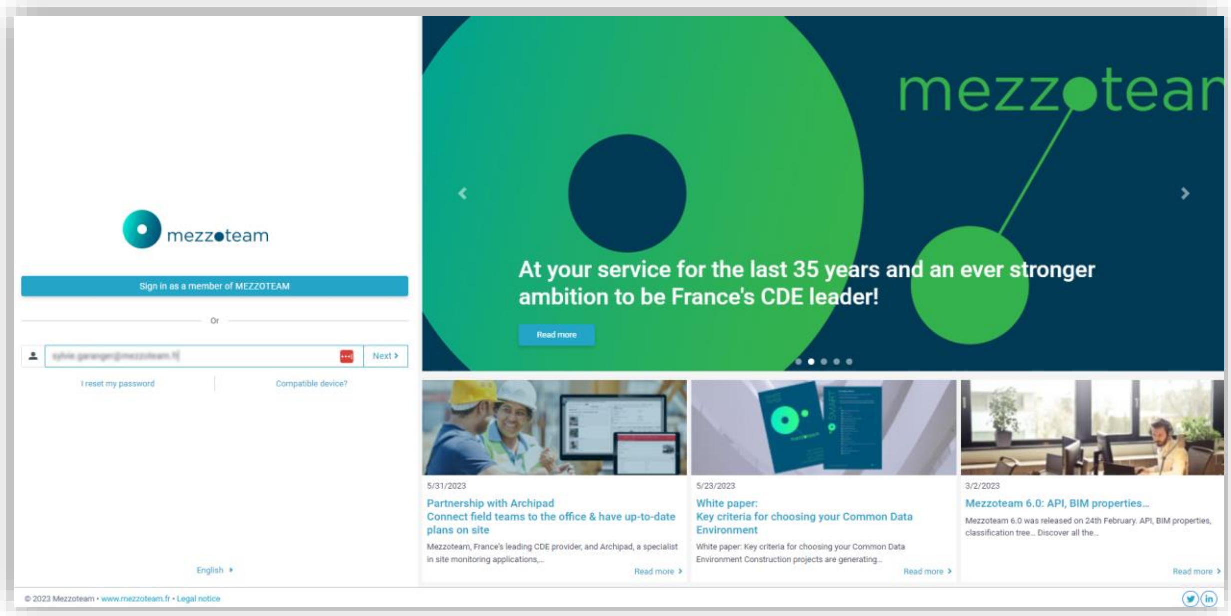
Number of previous passwords checked when changing password: 4

Minimum time between password changes: 1 hour

Length of time after which an account is deactivated if not logged in during this period: 200 days

1.2 Logging in to Mezzoteam

In order to login to Mezzoteam, you just need to enter the address www.mezzoteam.com in your Web browser.

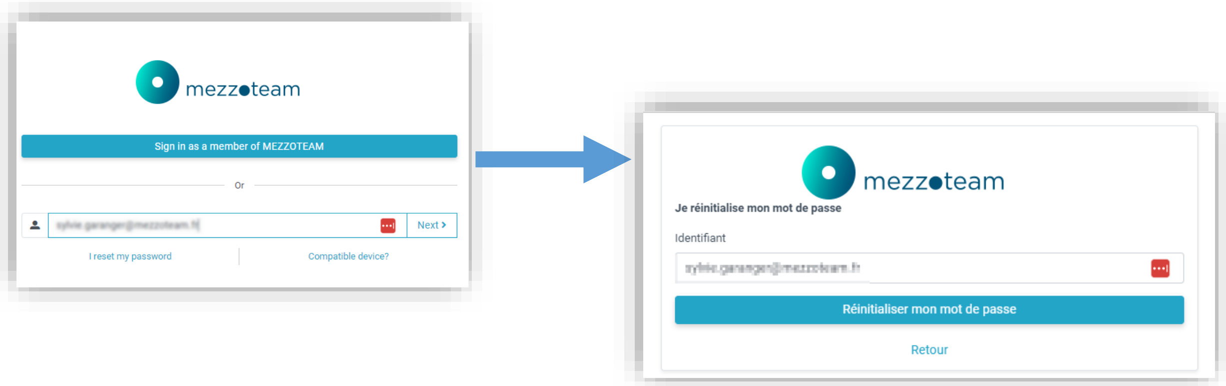


Prosys advises you to save the password on the browser only if you are the only user on your computer.
The same login must not be logged in at the same time on two different computers or with two different browsers.

1.3 Password forgotten

Should you forget your password, go to the Mezzoteam login page :

- Click on **"I reset my password"** in the login window.
- Enter your login (your e-mail address).
- Click on **"Reinitialize password"**.



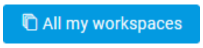
An e-mail will be sent to the e-mail address specified so that you can create a new password.

> *Note: 6 successive attempts at logging in using the wrong password*

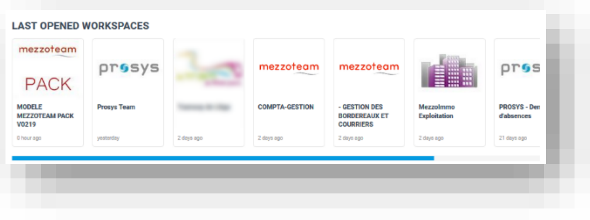
2. Customizing your Mezzoteam space

2.1 Accessing a project / workspace

To access a new workspace from Mezzoteam's home page:

- Click on « **My workspaces** » 

- Click on the list of the workspace you wish to access.



To access a workspace you have already visited, from Mezzoteam's home page, click on the workspace name in the scrolling list of the last opened workspaces.

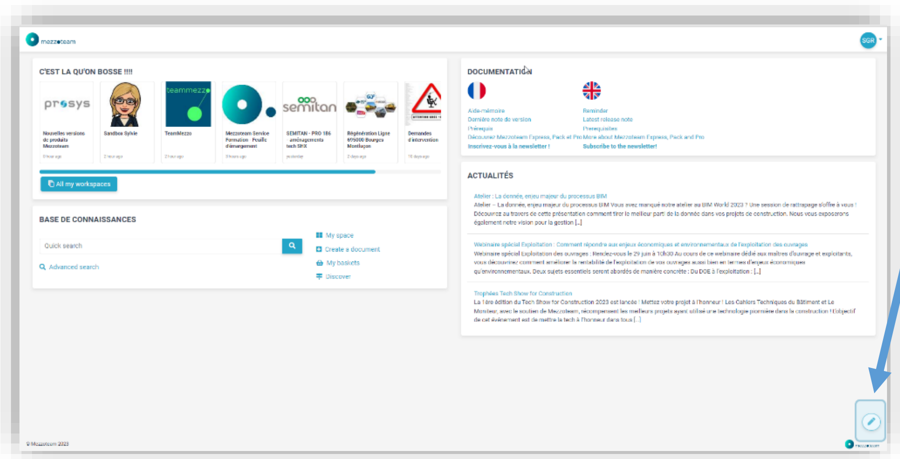
To return to Mezzoteam's home page, click on in the top left-hand banner.

> *Note: If you use Mezzoteam for several projects, you will be able to access all your workspaces with the same login and the same password without logging out.*

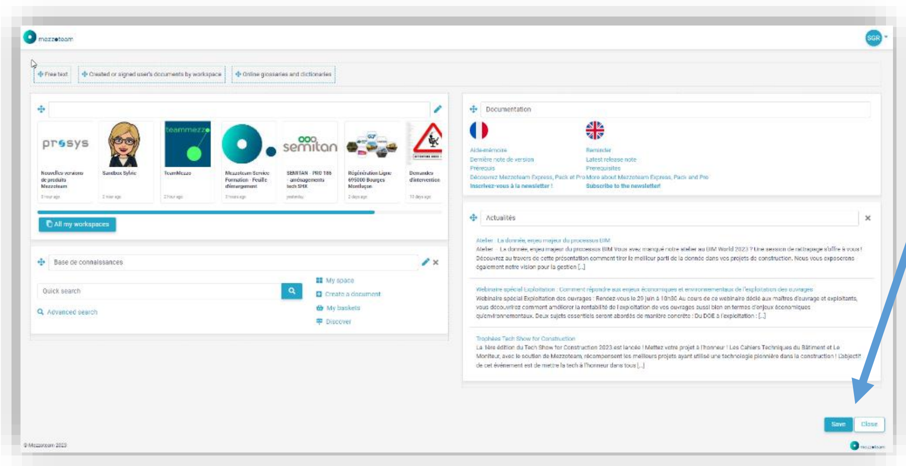
2.2 Customizing your home page

2.2.1 Customizing your home page

You can customize the widgets and interactive modules available on Mezzoteam's home page:



- Click on the icon "pencil" located at the bottom right on the home page



- Add, move, modify widgets as you wish
- Click on “SAVE” (bottom right) to save your modifications.

2.2.2 Display preferences

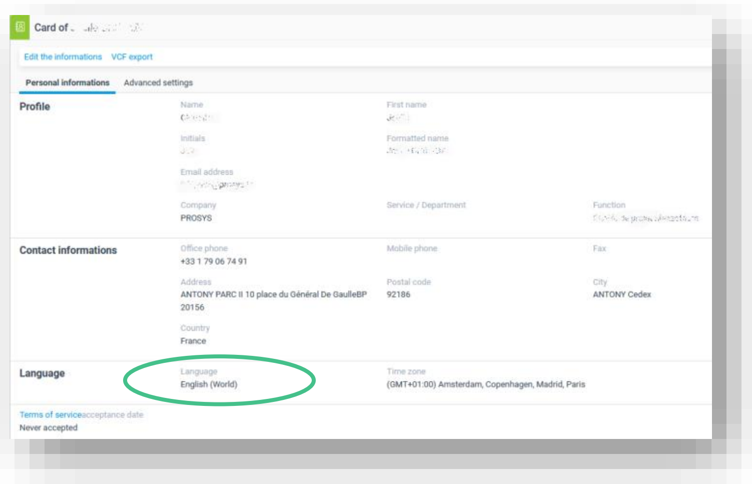
You can customize your display preferences such as the number of lines presented in a list and the list export format.

- Click on your trigram in the top right hand banner, ex : 
- Click on « **My account** »
- In the « **Advanced settings** » tab, click on « **Edit** »
- Select the number of lines needed
- Select the export format between *ExcelFile* or *OpenDocument file*
- Click on « **Save** »

2.3 Modifying personal information

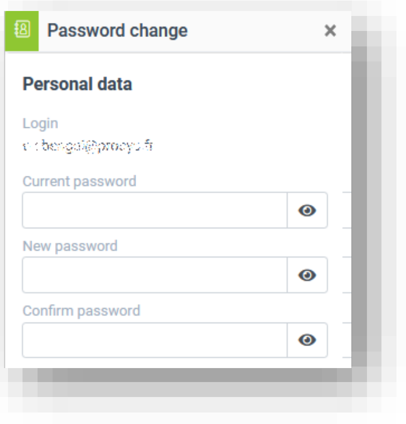
For the seamless operation of the project, it is important that each Mezzoteam user fills its contact form with their full details. To do this:

- Click on your trigram in the top right hand banner, ex :
  - Or go in the « Directory » section 
  - Click on your name in the directory’s user list.
- Click on « **Edit the informations** »
- Fill in your details
- Click on « **Edit** » to save it or « **Cancel** » to discard your modifications



To change its interface language go to the language field of the form.

2.4 Changing your password



You can change your password at any time.

- Click on your trigram in the top right hand banner, ex : HDG
    - Or go in the « Directory » section
    - Click on your name in the directory's user list.
- Click on "**Reset my password**".
- Enter your old password.
- Enter your new password.
- Confirm this new password.
- Click on « **Edit** » to save it or « **Cancel** » to discard your modifications

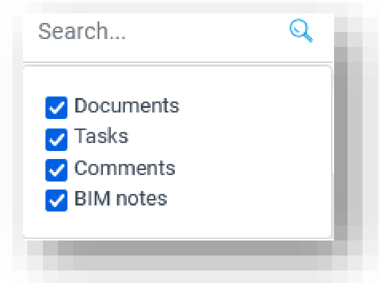
3. Search and consultation

3.1 Full text search

Entering a search

make a quick search by typing your search in the top right-hand corner of your screen

Entering the terms to be searched allows you to select the following types of content:

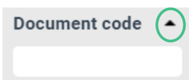


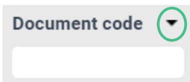
- Documents (forms and files filed in documents)
- Tasks (forms and files filed in workflow taks)
- Comments (text and files attached to comments)
- BIM notes

Entering several terms separated by spaces is interpreted as a search for what contains ALL the terms, in any order.

3.2 Sorting lists

The sorting criteria for each document list are indicated at the top right of the screen:





To change the document display order in a list, click once on the title of the column to be sorted for an ascending sort, and click a second time on the title of this same column for a descending sort.

3.3 Searching documents by filtering lists

3.3.1 Using filters

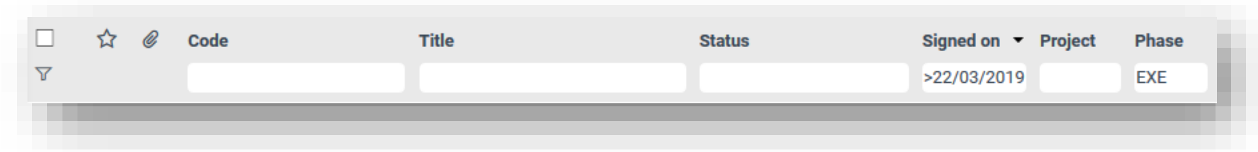
You can apply filters to each column displayed in a document list.

Some columns show a list of filterable values. Manual entry is still possible.

Filters may be applied to several columns simultaneously. Mezzoteam then only displays the documents corresponding to the different criteria entered.

- Click on  to apply a filter, or press Enter on your keyboard.
- Click on  in the first column to remove all the filter criteria for the current view.

- To remove a single filter from those applied, clear the filter zone and press *Enter*.



Search operators be entered in the filter zone:

- A whole word or a part of the word searched
- Select a value from a list, if values are displayed.
- Use search operators =, >, <, >=, <= (= and nothing after, show empty values).
- Exclude a criterion using the characters <> placed in front of a complete word (and not a part of the word). <> and nothing after, to exclude empty values.
- Use the wildcard characters: * matches zero or more characters, and ? a single character.

3.3.2 Searching on dates

Search operators may be used to carry out a search on a date.

Examples of criteria entered in the column "Signed on":

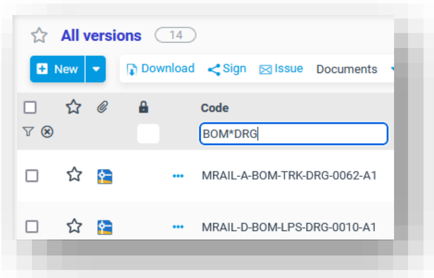
- 18/08/20128: will display documents signed on this specific date.
- >18/08/2018: will display documents signed as from the day following this date.
- <18/08/2018: will display documents signed the latest on the day preceding this date.
- >=18/08/2018: will display documents signed as from this date inclusive.
- <=18/08/2018: will display documents signed up to this date inclusive.
- <>18/08/2018: will display all the documents signed, except on this date.

3.3.3 Use the wildcard characters for combined filters

It may be useful to combine several filters in a single column.

When the characters to be filtered are separated by a character string of unknown content, use * between the criteria sought; take care to present them in the correct order.

? can replace a single character.



Example: Enter **BOM*DRG** in the "Code" column to display all the documents of the issuer "BOM" and of the document type "DRG" if the coding places the issuer before the type.

3.3.4 Use of combined filters

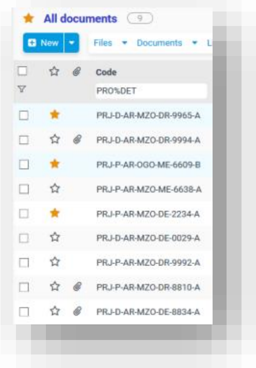
It can be useful to combine several filters in a single column. The values searched for are separated by the character ;

The values searched for can include wildcards.

Example: Enter BOM*DRG;BOM*DRW in the "Code" column to display all documents of the "BOM" issuer and of the "DRG" type and those of the "DRW" type

3.4 Using favourites

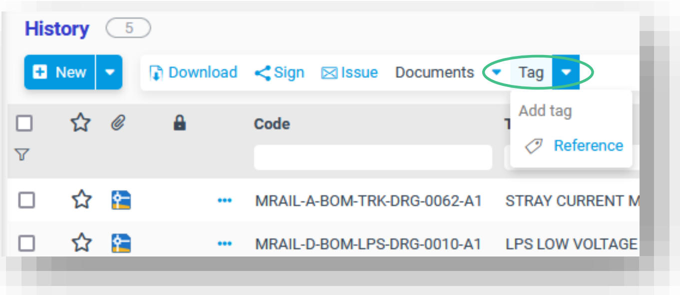
In the Documents section, you have a list you can use to collect your Favourite objects so that you can access them quickly.



- To classify a document as a favourite, click on ☆ at the start of the line.
- To classify a document list (view or folder) as a favourite, click on ☆ in front of the list label.
- To update the list with last versions of documents, select them and click on **"Update"**
- If you don't want an object to be retained as a favourite, click on ★ in front of the document or document list.

3.5 Using tags

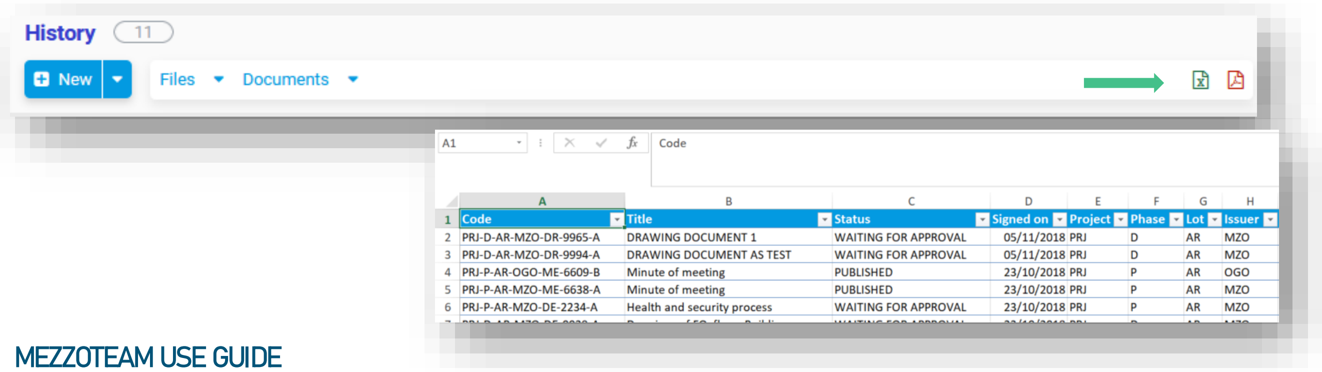
Tags allow you to organize your documents according to your own criteria. These tags are therefore personal. You can access them



- from a list, with the tags you have already defined
- or from a document form, which allows you to tag and create new tags
- or in the browser to manage the tags.

3.6 Exporting to Excel

At any time you can export the contents of a list to Excel® by clicking on the icon located on the top right. This function can be accessed from every lists and takes the active filters into account.

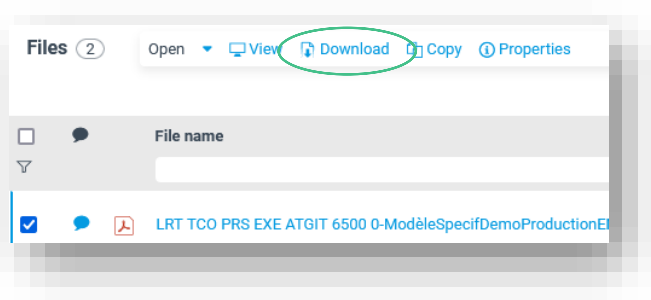


3.7 Downloading files

One or more files can be downloaded whatever the document status and enables you to save a copy of the files on your computer or network.

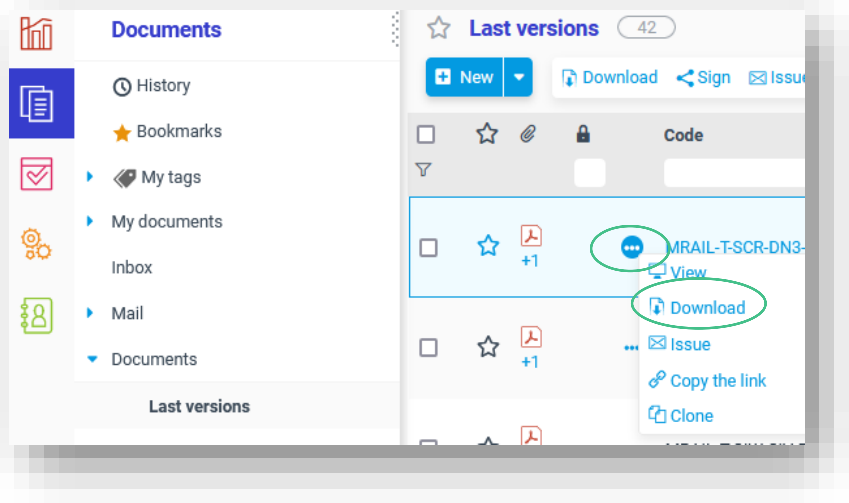
To download one or more files from a document form:

- In the **"Files"** section of the document's **"General"** tab, check the file(s) concerned.
- In the **"Files"** section dropdown menu, click on **"Download"**.
- Select the destination directory of the file(s) or find the files in the default download directory of your computer.



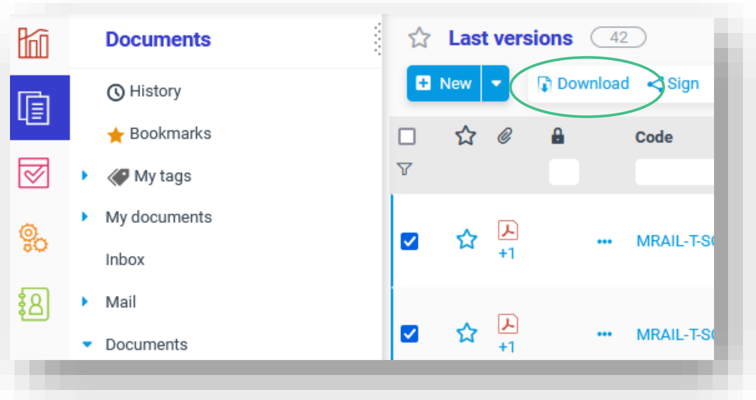
To download files without opening the document's form:

- In a document list, under dropdown menu « … » of each document
- Click on **"Download"**.
- Select the destination directory of the file(s) or find the files in the default download directory of your computer.



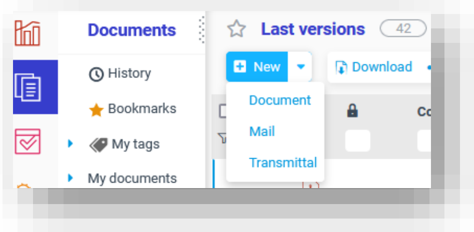
It is also possible to download the files of several documents at once:

- In a document list, check the documents containing the files to be downloaded.
- In the **"Files"** dropdown menu, click on **"Download"**.
- Select the destination directory of the file(s) or find the files in the default download directory of your computer.



4. Creating documents

4.1 Creating a document



Enter the workspace then click on the "**Documents**" section.

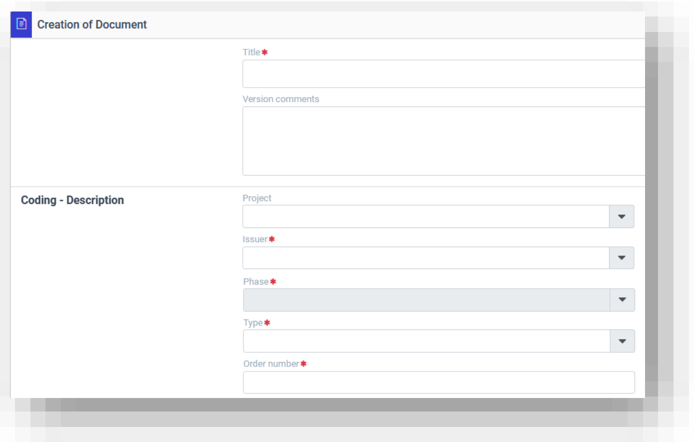
- In the menu bar, click on "**New**", and choose the document type you want to create
- Fill in the document form
- Upload a file (this can be done later)
- Click on "**Save**". Click on "**Save and sign**" if everything is correct (metadata and file added) only.

In the document form:

*: means that the fields are compulsory.

▾ : means that there is a list of predefined values.

▢ : means that the field depends on the value of another field.



- Click in the input field to display the list
- Click on the appropriate code or, if the list is too long, enter in all or part of the code or label, then click on the selected code.
- Fields containing a suitable value are framed in green
- Fields containing an inappropriate value are framed in red

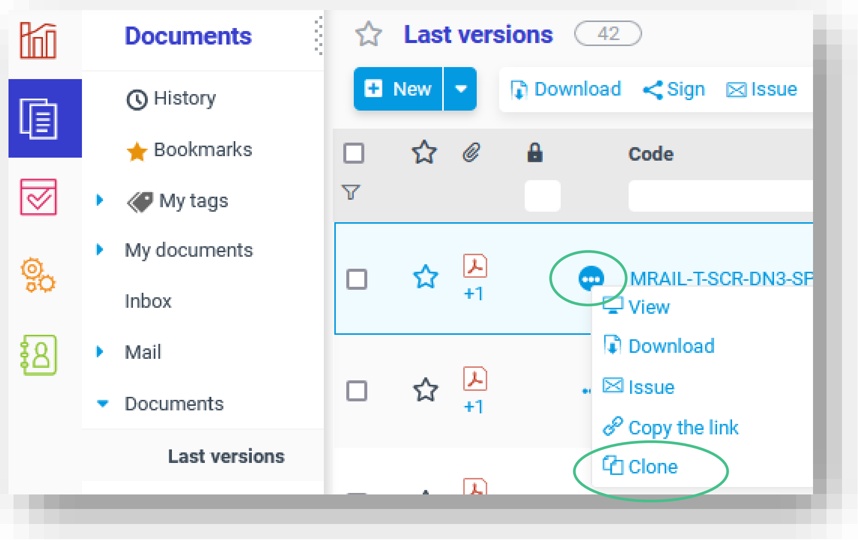
4.2 Cloning a document

Cloning a document allows you to quickly create a document from an existing one. To do this:

- Open the document to be cloned.
- Click on "**Clone**".

Or:

- In a document list, under dropdown menu « … » of each document
- Click on "**Clone**".
- Change the information required to create the new document.
- Add the file(s).
- Click on "**Save**". Click on "**Save and sign**" if everything is correct (metadata and file added) only.



When everything is correct, metadata and file added, **sign** the document (you don't have to sign again after a "**Save and sign**" action).

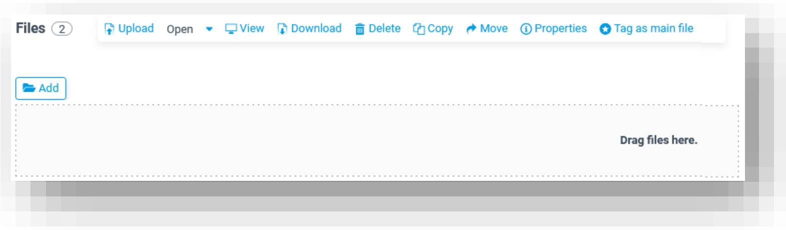
4.3 Uploading a file

- In the document's "**General**" tab, "**Files**" section.
- Click on "**Upload**".
- Select the file(s) to be uploaded using one of the following methods:

Method 1: Browse using your explorer

Click on "**Add**".

Select the file(s) to be uploaded.



Method 2: Drag using the explorer.

From your Windows Explorer, open the folder containing your file.

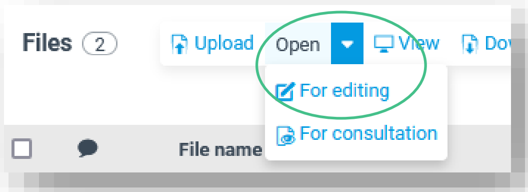
Select and drag the file(s) into the drop zone.

4.4 Modifying a file (locking and unlocking mode)

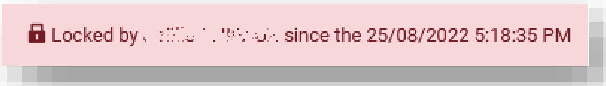
This feature is only available according to the workspace customization.

The document locking and unlocking function is only available if a file is present in the document form.

- Select the file to be modified by checking it.
- Click on **"Open" "For editing"**.
- The file opens with the appropriate software.
- Make your changes to the file.
- Save the opened file in its application.



While the file is being modified, the document form is "locked" and cannot be changed by another user.



- In **"Files"** section, click on **"Save"** to drop the modified file into Mezzoteam.
- The document is no longer "locked".

This opening for editing is also possible from a list, under "..." next to the document.

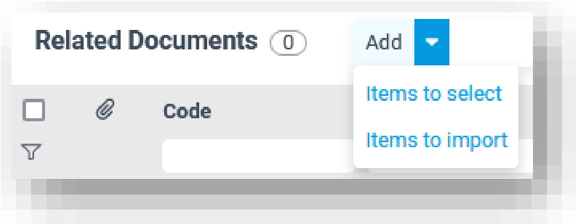
4.5 Referencing documents in a transmittal

- Select the documents you want to add to a document, a transmittal or similar, that you will create. For that purpose, choose the most practical list.
- Create this transmittal and save it. All the selected documents are listed in the Related documents section. Sections of related documents are sometimes called something else (Linked documents, Deliverables, Related 3D files, etc.)

4.6 Complete a list of related documents

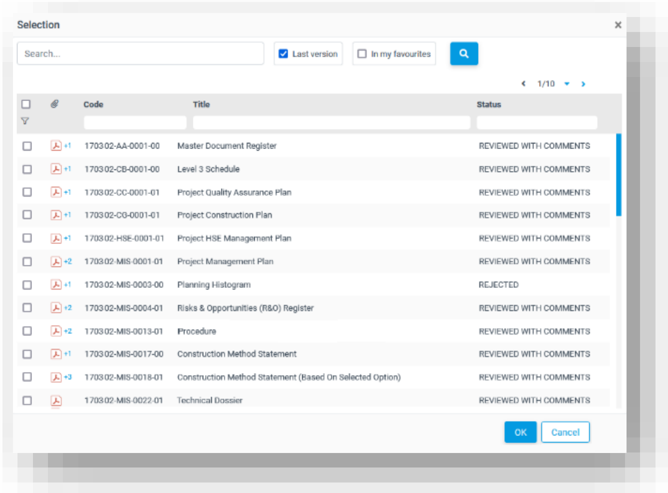
It is possible to complete a section of linked documents, whether or not the action described above was done.

- Open the document in which you want to link other documents.
- In the document's "**General**" tab, “**Related documents**” tab (there is various terms for linked documents, depending on the setting), click on "**Add**", then click on “**Items to select**”.



Mezzoteam opens a selection window that displays a list of documents you can link.

- Check "**Last version only**" if you only want to display the documents' latest indices.
- Check "**In my favourites**" if you only want to display a list of your favourite documents.
- Use the search zone, sort or filter the document list if necessary.
- Select the document(s) to be linked
- You can sort or filter other documents, previous selections are still active
- Click on "**OK**" in the selection window.

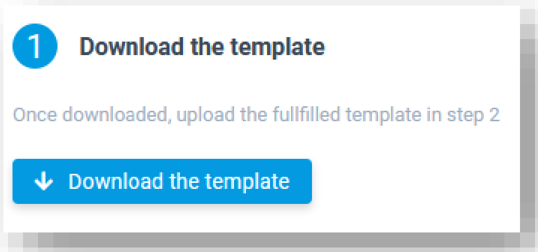


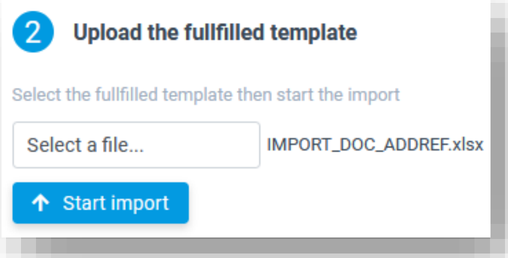
Import a list of document to link

For long lists of documents to be linked, this can be done via an import template:

- Open « New links » in the « Related documents » tab (there is various terms for related documents, depending on the setting)

- Click on « Items to import »
- Download the template in Excel or OpenOffice format.
- Enter the code of documents to be linked (Code of linked form)
- Enter link type. There is a real choice only if several kinds of linked document sections are defined in the workspace.





- Copy the code of the parent document on 1st column of every lines. You can also put the code of another parent document if you know it.
- Save the template on your computer (name it as you want).
- Select your file in the second part of the windows and clic on « Start import »
- Once the links have been successfully imported, clic on « Cancel » or close the windows with the cross.

There may be a list of links in error. This is itself a new import template. Correct directly in this new template and use it to finish the import.

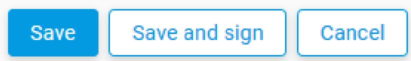
4.7 Signing / issuing a document

4.7.1 Signing

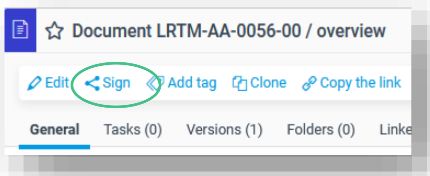
Signing a document triggers a status change and means that it can no longer be modified.

It changes status from "*Draft*" to "*Available*" or "*In validation*" if the document is subject to approval (status names can vary according to the project).

This action can be made:



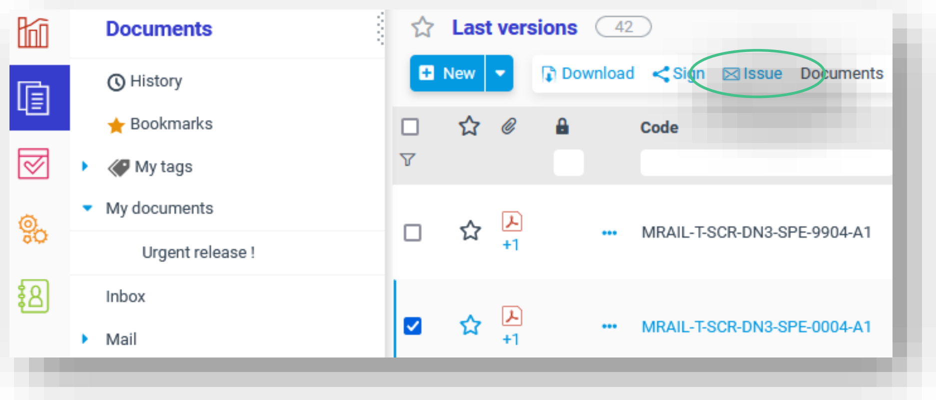
- When creating a document by clicking on the button « **Save and sign** »



- In the documents form in the « *Draft »* status by clicking on the button « **Sign** » located in the top banner.
- From a list of documents, selecting them to sign them all with a single click.

4.7.2 Issuing or signing / issuing a document

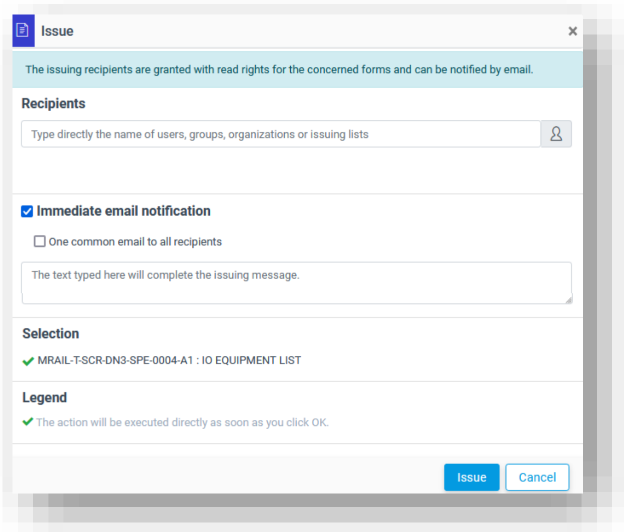
It is sometime possible to sign and issue a document in order to notify by e-mail workspace users and give them access to the document. In this case "**Sign**" action also proposes a notification.



Often the distribution is taken care of by the approval workflow, the "**Issue**" action is hidden.

When notification is available, "**Issue**" action is present in the action bar of the document or lists.

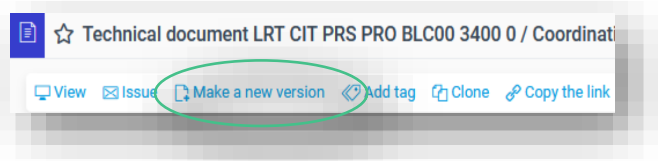
Open the document or select it from a list then click on "**Issue**".



- In the recipient field, type directly the name of the persons or groups.
- To open the directory, click on
- To send an email notification, check "**Immediate email notification**". You can broadcast without sending an email, just to give access rights.
- Common email = the email mentions all the recipients who can thus exchange via their email. Otherwise, the other recipients are not mentioned in the email received.
- Finalize by clicking Issue on the bottom

4.8 Make a new version of a document

Each time a signed document changes, a new version must be created. To do this:



- Open the document or click on "…" in a list of documents
- Click on "**Make a new version**". If the action is not present, it means that the document is not yet reviewable due to its

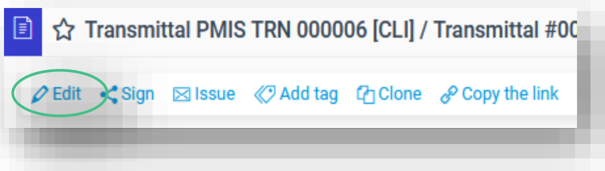
advancement in the approval workflow or that you are not among the people who are entitled to it.

- Make any adaptations to the modifiable fields.
- Upload the modified file in the "**Files**" section.
- Click on "**Save**" (or "**Save and sign**").
- Sign this new version of the document (if not already made).

4.9 Actions on « Draft » documents

4.9.1 Modifying a document's form

- Open the document with the "**Draft**" status or click on "…" in a list of documents
- Click on "**Edit**" in the "**General**" tab.
- Make your changes to the modifiable fields.
- Click on "**Save**" or "**Save and sign**".



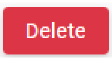
4.9.2 Updating linked document

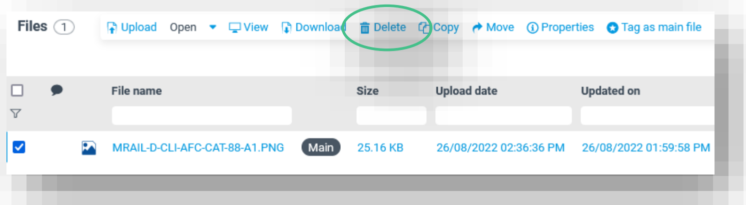
To update a linked document to its latest index:

- In a "**Related documents**" section.
- Click on "**Update**".
- Select new version(s) to link
- Click "**OK**"

It is possible to "sign" and "issue" linked documents directly from the parent document. A recommended use of the transmittal (parent document) to gather and check the deliverables

4.9.3 Deleting files from a « Draft » document

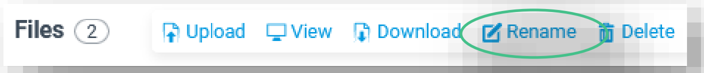
- In the document's "**Files**" section, check the file(s) to be deleted.
- Click on "**Delete**"
- Confirm the deletion with 



The file is moved to the Recycle bin, but still may be restored.

4.9.4 Renaming files from a « Draft » document

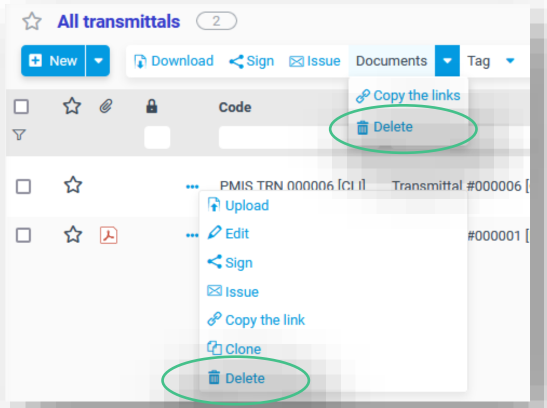
- In the document's "**Files**" section, check the file(s) to rename.
- Click on "**Rename**".



If the automatic renaming is activated on the document family, the renaming is done through the "Properties" button

4.9.5 Deleting « Draft » documents

- In a document list, check the document(s) or click on "…"
- In the "**Documents**" drop down menu, click on "**Delete**".
- Click on "**OK**" to confirm the deletion



Only documents with "**DRAFT**" status can be deleted. The status is sometime called IN PROGRESS, EDITION, etc.

Deleted documents still may be restored from the **Recycle bin**.

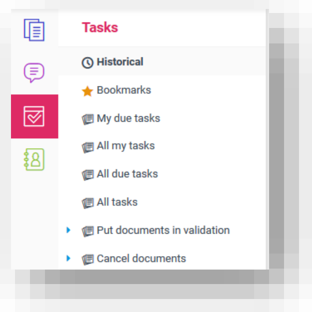
5. Approvals in Mezzoteam

This feature is only available according to the workspace customization.

Different workflows can be set up in order to manage review and approval of documents. When a document enters a workflow, Mezzoteam generates on task for each designated approver (users or groups of users).

5.1 Listing tasks

- Enter the workspace then click on the "**Tasks**" section.
- You enter the history of the last tasks opened.
- Click on the "**My pending tasks**" view (or "**My due tasks**")



In the "**My pending tasks**" view is a list of tasks related to documents I have to review or approve. By default it displays the following columns:

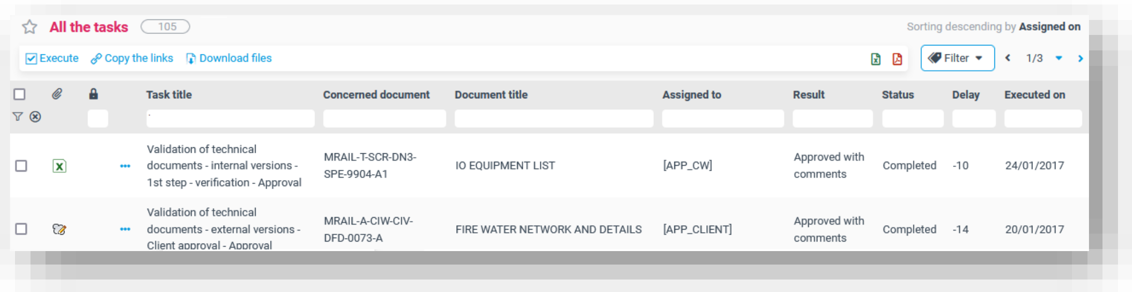
- Task name
- Document code
- Document title
- Assigned at
- Assigned to: user group to which the task has been assigned.
- Delay: a negative delay means that due date is yet to come. All tasks for which the due date is passed (positive delay) appear in red.
- Due date: deadline
- Status

Other views are offered:

"**My tasks**": all the tasks that have been assigned to me.

"**All pending tasks** ": All tasks for all the approvers that need to be completed in the workspace.

"**All tasks**": all tasks for all approvers.



5.2 Modifying a comment file

This feature is only available according to the workspace customization.

If a template file is attached to the task form in the "**Files**" section, edit and save this file (see paragraph "*Modifying a file (locking and unlocking mode)*"), then complete the task.

5.3 Execute a task

From "**My pending tasks**" view, open a form.

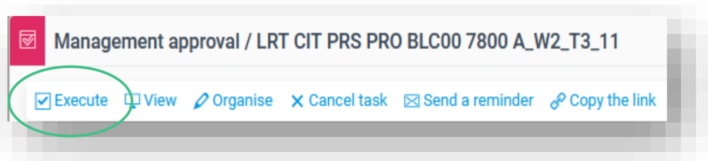
The action of executing a task is often directly accessible from the document form. "Execute" is the standard, however this action could appear as “Check”, “Approve”, etc., depending of the customization.

The task form looks like document form with tabs.

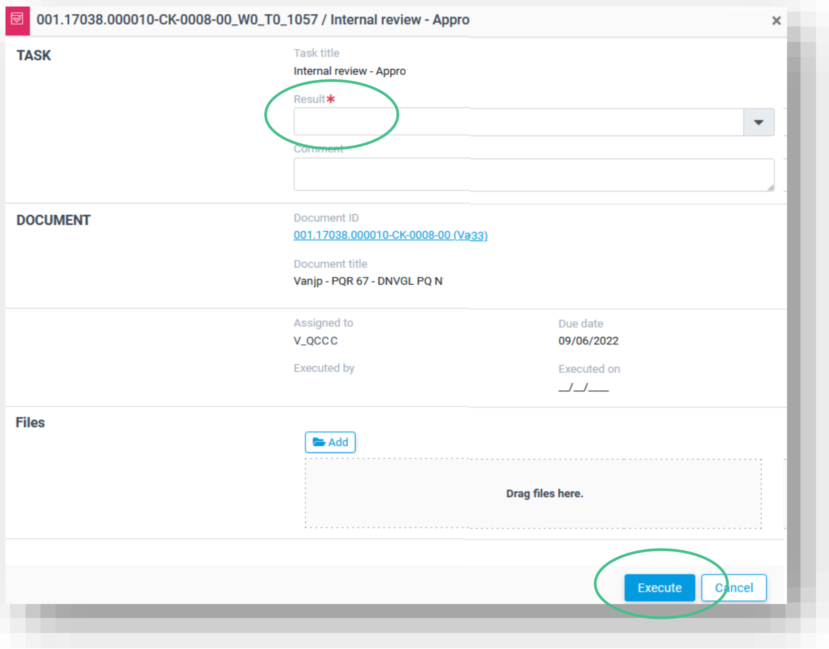
- **General**: Displays information about the task.
- **Tasks**: Display the tasks assigned in parallel on the document and those already done.
- **Readers**: Display the list of users or groups with read rights on the task
- **Log**: Display the history of the task's life

The task form contains several action buttons, the one on the left executes the task. The actions present depend on the user's profile.

- Click on "**Execute**". The term may differ but the action always corresponds to the leftmost button. If you do not have this button, it means that the task is already executed or that it is not assigned to you.



- Fill in the different task validation fields: « Result * », comment, and so on.
- Files: You can attach one or more comment file(s) to your opinion by uploading it/them in the "**File**" section, **before** validation.



- Finish by clicking on Execute » (bottom right). After that, there is no way to change the result or the attached file.

5.4 On-demand task

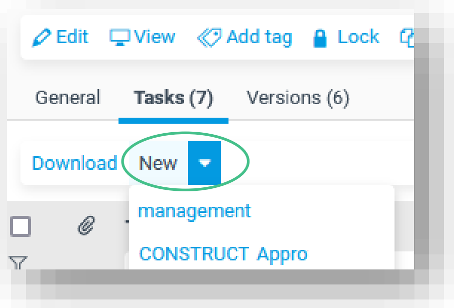
This feature is only available according to the workspace customization.

Certain workflow may allow selected users to generate a new validation task themselves.

This function is available if the "**New**" action appears in the document's "**Tasks**" tab.

Once created, a new task functions like any other.

- Drop down the "**New**" menu.
- Click on the name of the task to be created
- Enter a due date (if not filled)
- In the "**Assigned to**" field, click on the little guy in order to select the user(s), group(s) or organization(s) to which the task should be assigned. (if not filled)
- Click on Create at the bottom



Once created, the new task works like the others

5.5 Status of a task

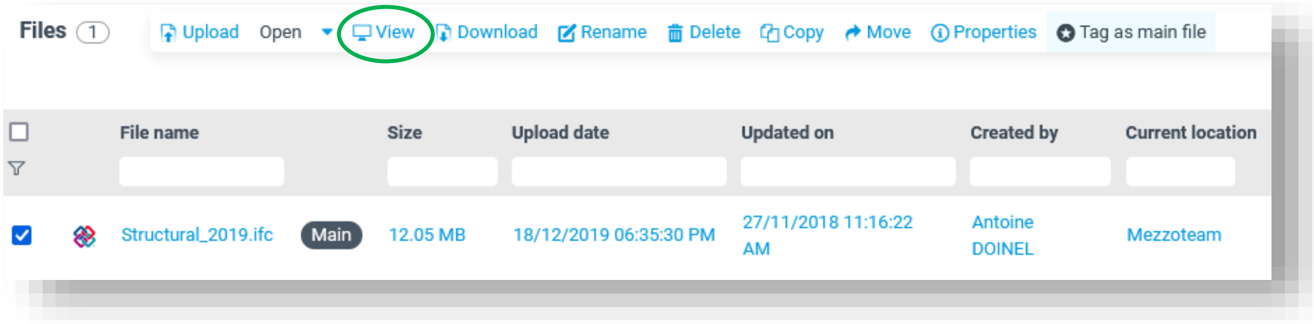
A task may have several different statuses:

- "**Pending**": default status on creation of the task.
- "**Completed**": status of tasks that have been completed, when the approver has reviewed or approved the document.
- "**Cancelled**": status of a task that is no longer current (For example: a consultative opinion is cancelled when the final opinion has been made and the document moves on to the next phase of its validation).

Do not confuse the status of a task ("**Pending**" or "**Completed**") with its result (for example "**with comments**" or "**approved**").

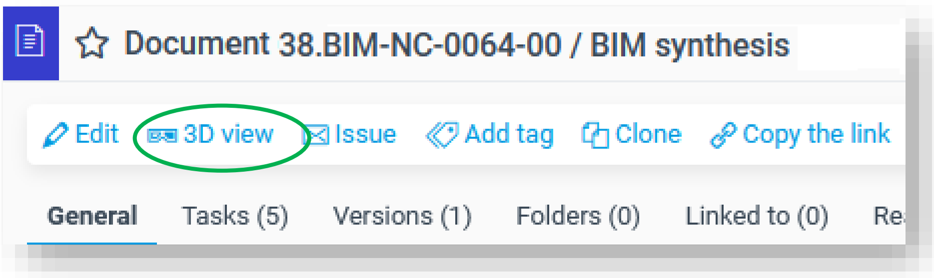
6. BIM Viewer

To launch a 3D view of an IFC model attached to a document, select the IFC file then clic the « **View** » button located in the files menu bar.



To view multiple IFC models simultaneously,

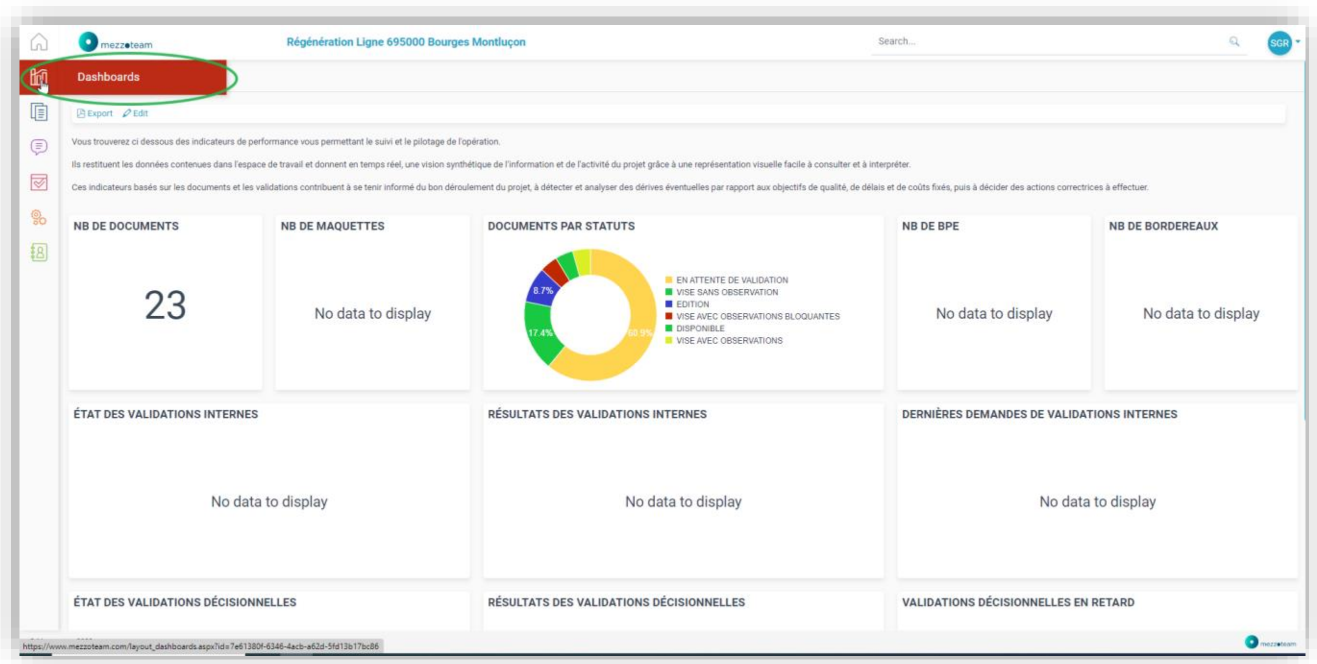
- Link the models in the Model 3D Related section of a summary model document. This model does not need to have a file itself.
- Click on "**3D View**" in the action bar of the synthesis model form.



To download the BIM Viewer users guide, clic the « **?** » button located at the right top of the screen.

7. Project Dashboards

To access to all indicators (stats, charts, graphs) configured in your project, clic on the section « **Dashboards** » located on the left in the Mezzoteam browsing vertical ribbon.



If you have any questions, contact your workspace administrator