Tekla EPM 2019

Configure Tekla EPM

April 2019

Contents

1 Configure Tekla EPM

As an administrator, you need to define your company information, automatic backup settings, and administration settings, add the necessary users, and otherwise set up Tekla EPM, so that other users can start working in Tekla EPM.

After setting up Tekla EPM, administrators can:

- Download and install updates, so that the updates are installed automatically for other Tekla EPM users in your company.
- Create backup copies of the Tekla EPM database to restore the database if it is compromised.
- Optimize and compress the information in the Tekla EPM database.
- Clear extra logs from particular actions performed by Tekla EPM users in the company.
- Export labor information from a Tekla EPM database, and import the labor information to another Tekla EPM database.
- Recover deleted combining, estimating, and production controls jobs, and recover import backup files.
- Find and repair program errors in Tekla EPM.

NOTE These instructions contain actions that can only be performed by Tekla EPM users with administrative rights. If you do not have administrative rights, contact your administrator for help.

For more information, see the following links:

Install Tekla EPM (page 6)

License Tekla EPM (page 8)

Manage Tekla EPM users and workstations (page 14)

Adjust settings and company information (page 36)

Update Tekla EPM (page 43)

Use Tekla EPM with other products (page 46)

[Export labor information (page 54)]
[Manage the Tekla EPM database (page 56)]
[Repair program errors (page 64)]

1.1 Install Tekla EPM

To install Tekla EPM, see the following requirements and instructions. The instructions for installing Tekla EPM vary depending on the computer onto which you are installing Tekla EPM: different instructions apply to the server computer and the client workstations.

The content installed with Tekla EPM

The following items are included in the full installation of Tekla EPM:

- Tekla EPM is the actual application.
- The MySQL database contains the information used by Tekla EPM. You can have multiple sets of data within the database.

  Note that the MySQL database is usually only installed on the server computer.
- Crystal Report viewer opens the report template files and uses an ODBC connection to populate information in reports.
- Tekla EPM Remote Server allows performing functions remotely. For example, the Tekla EPM Remote Server allows running automated events and using the Tekla EPM Go mobile application if you have purchased the application.

Tekla EPM connects to the Tekla EPM database, and the connection can be selected by machine and by port.

Normally, the Tekla EPM database is installed on the server computer, and the connection information is the IP address or the computer name of the computer running the server installation. However, the server machine is connected to the local host.

The information that you need to install Tekla EPM

To install Tekla EPM, you need:

- The installer for the correct version of Tekla EPM

  The installers and program updates are available in .

- The server name or IP address

  The server name or IP address is needed to set the connection to the server when you first log in to a client workstation. We recommend that you write down your server name and IP address for the future.

- Suitable locations for the default folders in Tekla EPM

  The default folders are the folders where Tekla EPM saves information by default.

  We recommend that each Tekla EPM user on each workstation sets the same folders on the Tekla EPM server as default folders, so that sharing information is easy. For more information on the default folders, see Set the default folders for saving files (page 42).

  For example, you can use the following locations:

Backup	`C:\Users\Public\Documents \Tekla\Tekla EPM\Backup`
Export	`C:\Users\Public\Documents \Tekla\Tekla EPM\Export`
Import	`C:\Users\Public\Documents \Tekla\Tekla EPM\Export`
Log	`C:\Users\Public\Documents \Tekla\Tekla EPM\Log`
Document Index	`\\Server\SharedFolder`
Drawing	`\\Server\SharedFolder`
Update	`\\Server\SharedFolder`
Custom Report	`\\Server\SharedFolder`

Install Tekla EPM

1. Go to https://download.tekla.com/tekla-powerfab/tekla-epm.
2. Download the installer for the desired Tekla EPM version.
3. Double-click the installer to run the installation.
4. On the first page of the installation wizard, review the license agreement and accept it.
5. On the second page, select the installation type:
   - Select the **Server** option to install Tekla EPM on the server computer.
   - Select the **Client** option to install Tekla EPM on a client workstation.

- Select the **Update** option if you already have a version of Tekla EPM installed on your computer and want to update the existing program files.

   If you select the **Server** option, the MySQL database is installed. If you select the **Client** option, the MySQL is not installed. If you select the **Update** option, only updates to existing program files are automatically installed.

6. On the third page, select the folder where you want to install Tekla EPM.

   We recommend installing Tekla EPM to the default folder (`C:\Program Files (x86)\Tekla\Tekla EPM`) shown in the installation wizard.

7. Click **Install**.

Tekla EPM is installed.

Connect to the MySQL database

The following instructions only apply to client workstations, not the server computer.

1. Open Tekla EPM on the client workstation.
2. To connect to the database of your company, in the **Connection Settings** dialog box, type the IP address or name of your server.

   You do not need to change the port number from the default value 3306.

3. Click **OK**.
4. Sign in to Tekla EPM.

   The default Tekla EPM sign-in information is:

   - username: `admin`
   - password: `fab`

   When you have logged in, Tekla EPM may ask you to update the OBDC connection for the report viewer.

5. Click **Yes**.
6. Set the default folders for saving Tekla EPM information.

   For detailed instructions, see Set the default folders for saving files (page 42).

After setting the default folders on the first client machine, you can configure the other client workstations by copying the settings file of the first client workstation in the `C:\Users\Public\Documents\Tekla\Tekla EPM \Settings` folder to the same location on the other client workstations.

1.2 License Tekla EPM

All users need a valid Tekla license and a reliable internet connection to use Tekla EPM.

The Tekla licenses used for Tekla EPM are user-specific and are not tied to particular workstations. The licenses of each Tekla EPM user are tied to the user's Trimble Identity. For this reason, users always need to sign in to Tekla EPM with their Trimble Identity. Since the licenses are managed online, you need to have a reliable internet connection to use Tekla EPM.

To obtain a Tekla license, contact your organization's administrator.

The Tekla licenses and user accounts are assigned and managed in the Tekla Online Admin Tool. For details about Tekla licenses, see Manage Trimble Identities and Tekla Online licenses (page 10).

In companies that are moving from using Fabsuite to using Tekla EPM, administrators need to migrate the company licensing from Fabsuite licensing to Tekla licensing.

See also

Migrate to Tekla licensing (page 9)

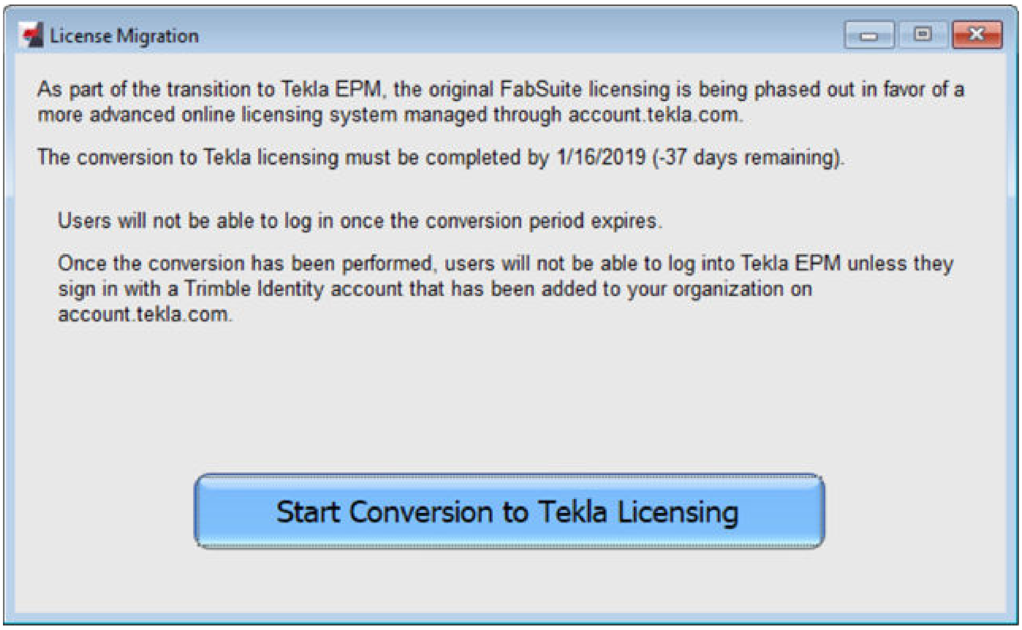
Manage Trimble Identities and Tekla Online licenses (page 10)

Migrate to Tekla licensing

When moving on to using Tekla EPM, administrators need to migrate their company from Fabsuite licensing to Tekla licensing.

Note that once you have migrated to Tekla licensing, the users in your company will not be able to log in to Tekla EPM without a Trimble Identity. For more information, see Trimble Identity for Tekla Online Services.

1. Sign in to Tekla EPM.
2. In the **License Migration** dialog box, click **Start Conversion to Tekla Licensing**.



3. Click **Convert to Tekla Licensing Now**.

   When the license conversion is completed, Tekla EPM asks you to restart Tekla EPM.

4. Click **OK** to close the message.
5. Go to https://account.tekla.com and add users to your organization.
6. Close and restart Tekla EPM to use Tekla licensing.

See also

Manage Trimble Identities and Tekla Online licenses (page 0)

Manage Trimble Identities and Tekla Online licenses

As an administrator, you manage your organization's user accounts and ensure that your users have access to Tekla Online.

The tool you use to manage these account settings for Tekla products is called the Tekla Online Admin Tool.

Organization administrator responsibilities

Tekla Online administrators manage the access of the organization's users to Tekla Online services and licenses. One or more people in your organization can be administrators. The first user is invited to your organization group by a

Trimble representative and given administrator rights and that person is then responsible for adding other users and administrators as necessary.

As an administrator, you are responsible for:

- Inviting employees to your organization group to allow them access to the following services:
    - Tekla Online licenses, which are licenses connected to a Trimble Identity login. Tekla services and features that use Tekla Online licenses include Tekla Model Sharing, Tekla EPM, Trimble Connect, Tekla Structures Partner configuration, and Tekla Structures elearning courses.
    - Tekla discussion forum.
    - Part of the content in Tekla User Assistance and Tekla Warehouse.
- Removing people from your organization group when they no longer belong to your organization.

Add users to your organization group

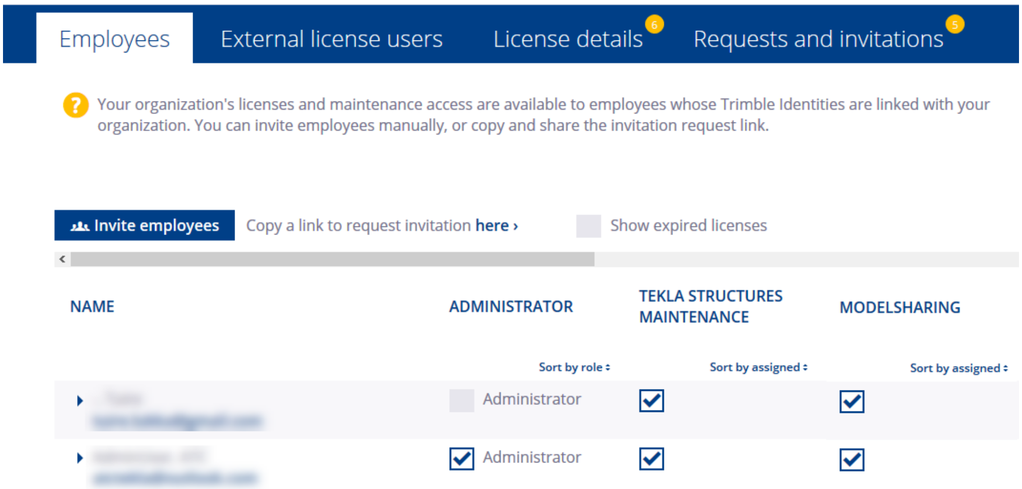
User action is required, so if your users are not familiar with Trimble Identities and the account creation process, we recommend that you inform them before you send any invitations.

Users can only be **employees** in one organization group at a time. If a user is already an employee in some other organization group, joining your organization group removes the user from the other organization group. You can add the user as an **external license user** to just give the user access to a license. Adding a user as an external license user does not change the user's employee or external license user status with any other organizations.

There are alternative methods for adding the users:

- You can invite users by adding their email addresses yourself. The users need to click a link on a confirmation email.
- You can make a link available to your users, who can use it to request employee membership in your organization. The users must make the request and you must approve the requests.
- On the user account page, users can search for and request to join organizations as employees. The organizations that users can see are limited based on their email address. The users must be instructed to do this and you must approve the request.

1. *Administrator*: Log in to the Tekla Online Admin Tool and switch to the **Employees** or **External license users** tab.



2. *Administrator*: Invite users to join or make a membership request link available to them:

   a. At the top of the table, click **Invite employees** or **Invite users** to enter the e-mail addresses and send the invitations.

      - You can enter several addresses at the same time, for example: `user1@example.com,user2@example.com`
      - It is not necessary for the users to have a Trimble Identity; new accounts are created based on your invitations if necessary.
      - Trimble's system sends an e-mail to the invited users. Each user must click on the e-mail link to accept the invitation within one week (if the invitation expires, a new invitation must be sent). If a new account is created for a user, the user must fill in the mandatory profile information before proceeding.

   b. To add users as employees, you can alternatively **Copy a link to request invitation**.

      - The link can be used by multiple people and it does not expire. You can for example email the link to multiple users or place it on your intranet.
      - By following this link, users can only request to join your organization. You must approve the requests on the **Requests and Invitations** tab in the Tekla Online Admin Tool.

   After an invited user has confirmed the invitation or an administrator has approved a user's request to join the organization:

   - If you added the user as an employee, the organization's maintenance status is extended to the user for access to additional content and services.

- The user account appears on the user list and can now be given administrator privileges (employee users) or assigned a Tekla Online license (all users).

Resend an expired invitation

If the invited user does not accept the invitation within a week, the invitation link stops working. To be able to join the organization, the user must receive a new link.

1. Log in to the Tekla Online Admin Tool and switch to the **Requests and invitations** tab. Invitation statuses are:
    - **New**: invitation is valid; the user has taken no action yet.
    - **Rejected**: the user rejected the invitation.
    - **Expired**: the user did not accept the invitation within one week.
    - When the user accepts the invitation, it is removed from this list.
2. Find the expired invitation for the user and click **Resend**. A new invitation e-mail is sent to the user with a new link that is valid for one week.

    NOTE The previously expired link still does not work. The user must click the new link.

Remove users from your organization

1. Log in to the Tekla Online Admin Tool and switch to the **Employees** tab.
2. Click the user account you want to remove.

    Additional information and options are shown on the user's row.
3. Click **Remove from organization** to remove the user from your organization group.

    The user is taken off your list, can no longer use your Tekla Online licenses and is no longer covered by your organization's maintenance.

Assign user rights or licenses

If your organization has a maintenance agreement, all users in your organization group have access to content and services which require maintenance. As an administrator, you can additionally assign other users administrator rights or give users access to your organization's Tekla Online licenses.

1. Add the users to the **Employees** or **External license users** group as explained above.

2. Activate administrator status (employees only) or license for the user in the Tekla Online Admin Tool by selecting the checkbox on the user's row. Administrator rights allow a user to manage other users in the Tekla admin tool.

Check Tekla Online license usage and expiry date

Tekla Online licenses are purchased and managed separately from Tekla Structures licenses.

1. Log in to the Tekla Online Admin Tool and switch to the **License details** tab.
2. Check the license details:
   - Licenses are used by the specific named users that you select on the other tabs.
   - License expiration warnings are also displayed to users in Tekla Structures when the expiration date is nearing for licensed features such as Tekla Model Sharing.

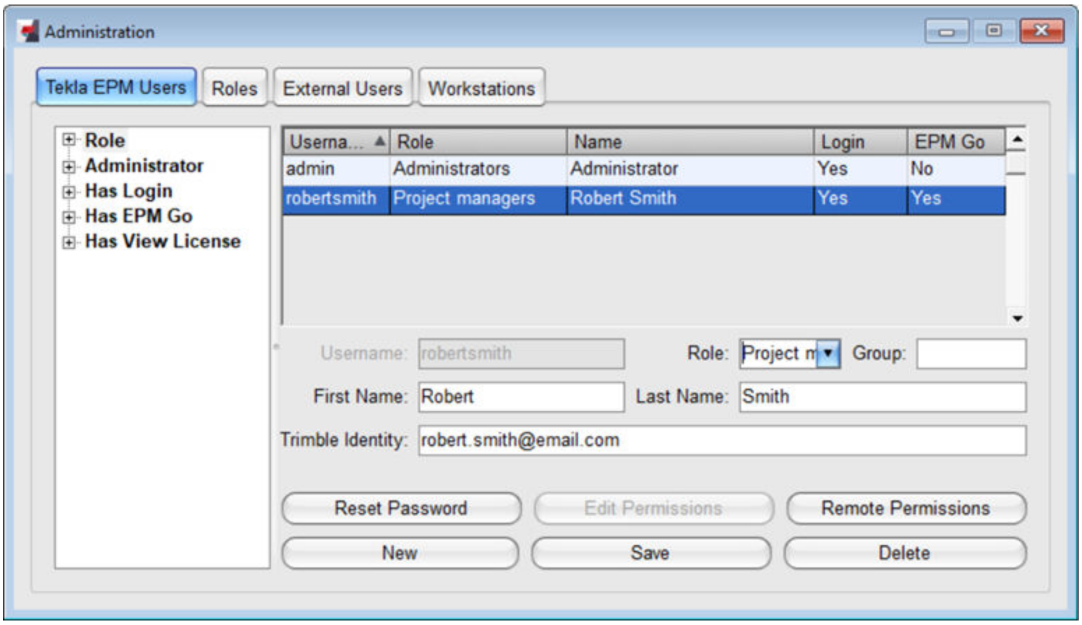
Related information

1.3 Manage Tekla EPM users and workstations

In the **Administration** dialog box, administrators can add and delete Tekla EPM users in their company, modify the users' permissions, and add, modify, or delete workstations.

To access the **Administration** dialog box, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.



For more information, see the following links:

Add, modify, and delete Tekla EPM users (page 15)

Manage user permissions (page 18)

Add, modify, and delete external users (page 0)

Manage remote user permissions (page 21)

Add, modify, and delete user roles (page 0)

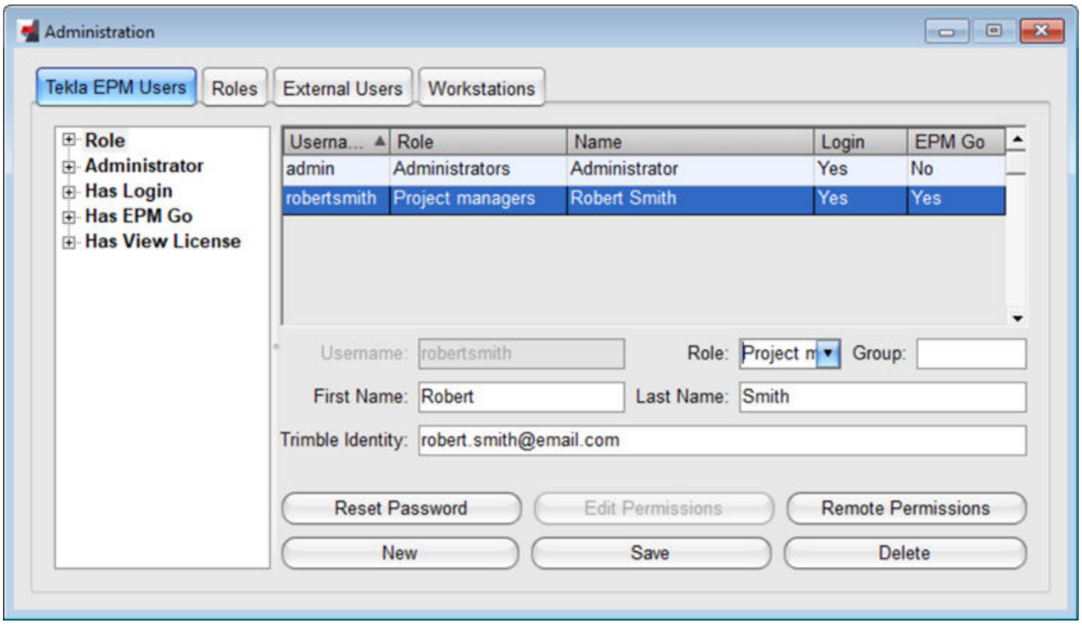
Add, modify, and delete workstations (page 0)

Add, modify, and delete Tekla EPM users

On the **Tekla EPM Users** tab of the **Administration** dialog box, administrators can add new users, modify the properties of the existing users, and delete any unnecessary users. The users' passwords can also be reset.

To manage Tekla EPM users, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.



Add a user

1. On the **Tekla EPM Users** tab of the **Administration** dialog box, click **New**.
2. Define the user properties.

   The properties marked with an asterisk (*) are mandatory information.

Option	Description
Username *	The username with which the user logs in to Tekla EPM. Type the username in the **Username** field. Note that the user name cannot be changed after the user has been added.
Role	The user role assigned to the user. A role determines which permissions the users with that role have in Tekla EPM. For more information, see Add, modify, and delete user roles. You can also modify the permissions individually for users. For more information, see Manage user permissions (page 18). Click the arrow on the right side of **Role** list and select a role in the list.

Option	Description
Group	The group which the user belongs to. For example, you can define groups for estimators and project managers. Note that groups do not allow you to automatically assign permissions to the user. Type the user group in the **Group** field.
First Name, **Last Name**	The first and last name of the user. Type the appropriate names in the **First Name** and **Last Name** fields.
Trimble Identity	The email address that has been registered as the user's Trimble Identity. The Trimble Identity is a user account that allows the user to access various Tekla Online services and other Trimble products. For more information, see Trimble Identity for Tekla Online services. Type the appropriate email address in the **Trimble Identity** field.

3. Click **Add**.

The user is added to Tekla EPM.

When the users log in to Tekla EPM for the first time, they need to leave the **Password** field blank. Then, they need to set the new password in the **Change Password** dialog box.

Note that if you have not assigned roles to new users, they have no access to any information in Tekla EPM. You need to modify users' permissions to give them access to the necessary information and modules. For more information, see Manage user permissions (page 18).

Reset a user's password

If necessary, you can reset a user's password, so that they can create a new one the next time they log in to Tekla EPM.

Note that if the user remembers their current password, they can change the password by themselves at any time.

1. On the **Tekla EPM Users** tab of the **Administration** dialog box, select the user whose password needs to be reset.

2. Click **Reset Password**.

3. To confirm resetting the password, click **Yes** in the confirmation dialog box.

When the user logs in after the password has been reset, they need to leave the **Password** field blank. Then, they need to set the new password in the **Change Password** dialog box.

Modify a user

1. On the **Tekla EPM Users** tab of the **Administration** dialog box, select the user that you want to modify.
2. Modify the user's role, group, first and last name, and Trimble Identity according to your needs.
3. Click **Save**.

Delete a user

1. On the **Tekla EPM Users** tab of the **Administration** dialog box, select the user that you want to delete.
2. Click **Delete**.
3. To permanently delete the user, click **Yes** in the confirmation dialog box.

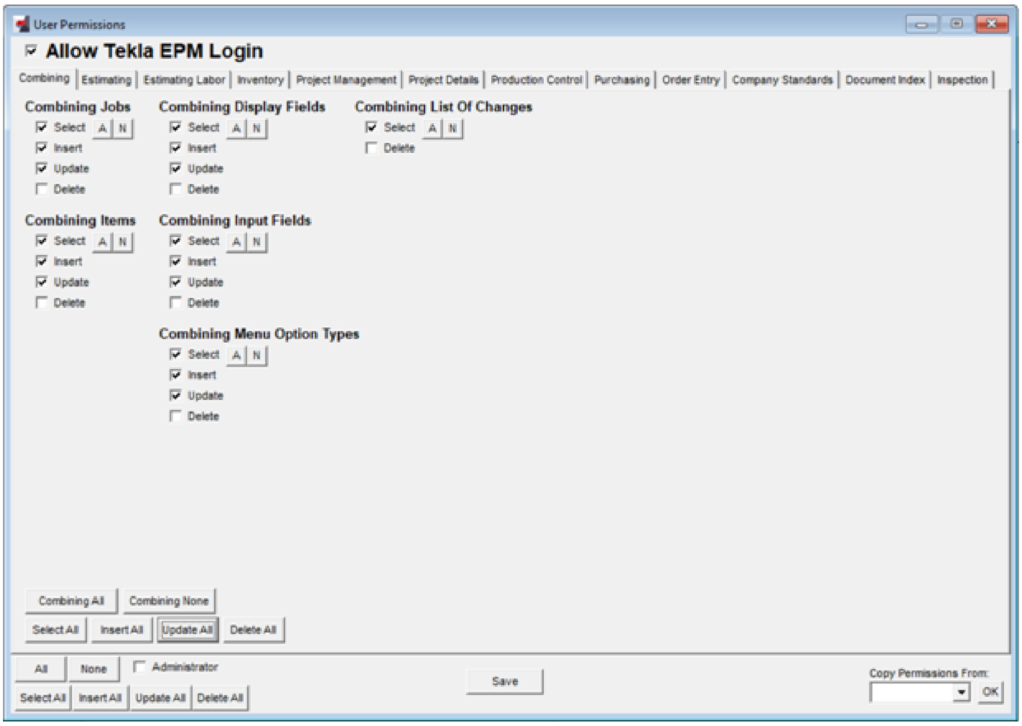
Manage user permissions

When administrators create a new Tekla EPM user, the user does not have any permissions in the Tekla EPM. This means that they cannot access, view, or modify any information in any module in Tekla EPM. Administrators can manage the user permissions in their company either separately for each user, or by creating user roles and assigning them to users. To modify the permissions of an individual user, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. On the **Tekla EPM Users** tab of the **Administration** dialog box, select the user whose permissions you want to modify.
4. Click **Edit Permissions**.

   Note that if the user has been assigned a role, their permissions cannot be modified individually, so the **Edit Permissions** button is inactive.
5. At the top of the **User Permissions** dialog box, select the **Allow Tekla EPM Login** check box.

When logging in to Tekla EPM has been allowed for the user, you can modify the other permissions.



The **User Permissions** dialog box has multiple tabs that represent the different modules and features of Tekla EPM. This way, the user permissions can be set separately for each module.

The tabs are divided into sections that represent different parts of the module or feature. This allows you to give the user permissions to only perform particular actions related to the module.

All sections contain check boxes that determine what the user can do in that part of the module. The available check boxes are:

- **Select**: When selected, allows the user to select and filter information, such as material items.
- **Insert**: When selected, allows the user to add new information.
- **Update**: When selected, allows the user to modify existing information.
- **Delete**: When selected, allows the user to delete information.

For example, to allow the user to select items and add items in a combining job, select the **Select** and **Insert** check boxes in the **Combining Items** section of the **Combining** tab. If only the **Select** and **Insert** check boxes were selected, the user could not modify or delete combining items, so the **Edit** and **Delete** buttons would not be available.

6. To modify the user permissions, do any of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Select the permissions one by one</td><td>a. Click a tab at the top of the User Permissions dialog box to open it.
b. Select check boxes next to the permissions that you want to give to the user.
You can also click the A (all) and N (none) buttons to select or clear all check boxes in a section. This way, you can quickly give the user all or no permissions to that part of the module or feature.
c. Repeat steps a to b on all necessary tabs.</td></tr>
<tr><td>Select multiple permissions at once</td><td>• Do one of the following:
• To allow the user to perform an action anywhere in the selected module, click the desired button at the bottom of the current tab.
• To allow the user to perform an action anywhere in Tekla EPM, click the desired button at the bottom of the dialog box.
For example, when the Update All check box is selected at the bottom of a tab, the user can modify information in all parts of the module.
However, if the Update All check box is selected at the bottom of the User Permissions dialog box, the user can modify information in all modules of Tekla EPM.</td></tr>
<tr><td>Copy the permissions of another Tekla EPM user</td><td>a. At the lower-right corner of the dialog box, click the arrow on the right side of the Copy Permissions From list.
b. Select the desired user in the list.
c. Click OK.</td></tr>
<tr><td>Give all possible permissions</td><td>• At the lower-left corner of the dialog box, select the Administrator check box.</td></tr>
</table>

7. Click **Save** to save the permissions.
8. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Add, modify, and delete user roles (page 0)

View the user permission report (page 21)

View the user permission report

Administrators can view a report that shows the permission settings of the Tekla EPM users in their company. Administrators can select between two commands: **View User Permissions Report - All** and **View User Permissions Report - Selected**. The **View User Permissions Report - All** displays the permissions of all Tekla EPM users, whereas the **View User Permissions Report - Selected** allows the administrators to select which users' permissions they want to view.

To manage Tekla EPM user permissions, see Manage user permissions (page 18).

View the permissions of all users

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **View User Permissions Report - All**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

You can also export the report and save it in another file format.

View the permissions of a selected user

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. In the **Administration** dialog box, select the user whose permissions you want to view.
4. Click the **Administration** ribbon tab.
5. In the menu, select **View User Permissions Report - Selected**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

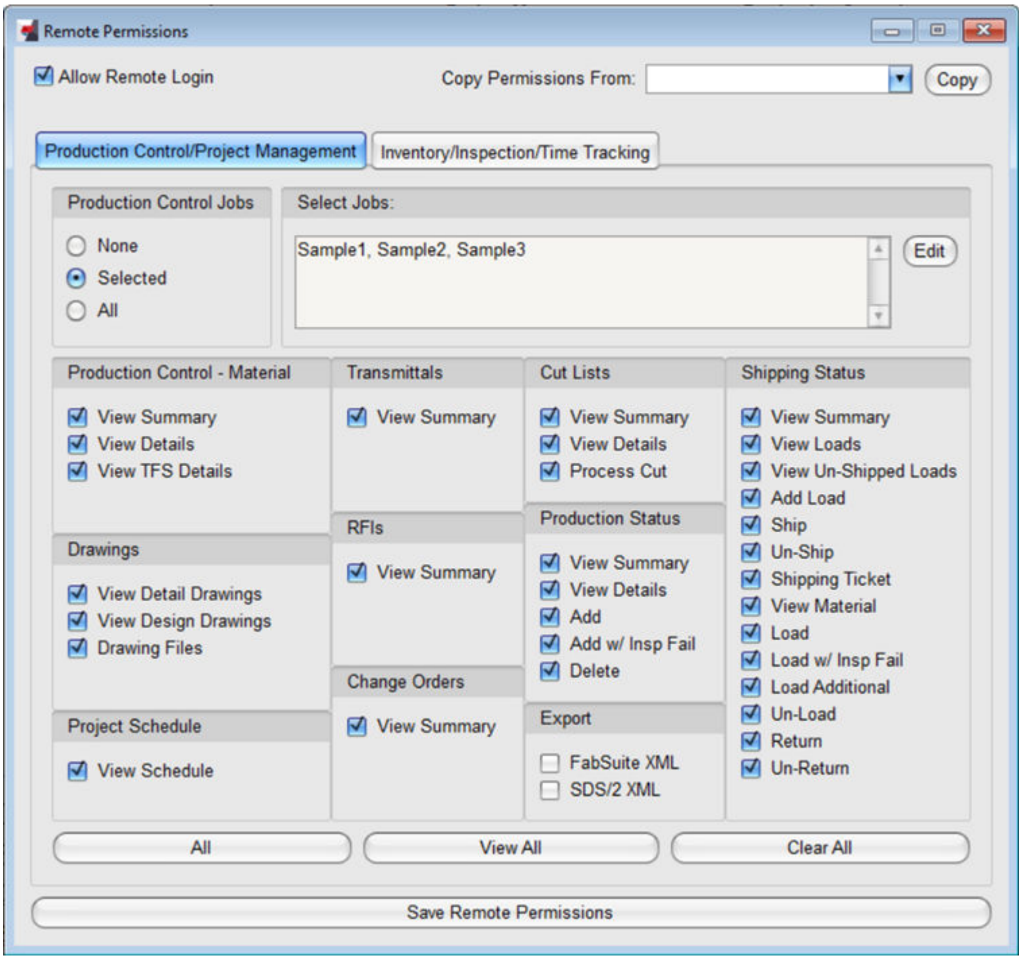
You can also export the report and save it in another file format.

Manage remote user permissions

Administrators can allow remotely using Tekla EPM Go for any internal or external Tekla EPM users to access particular information. The users that have been assigned remote permissions can access Tekla EPM Go through a remote link when they are out of the office, and modify the information in Tekla EPM Go according to the permissions they have been given.

1. On either the **Tekla EPM Users** tab or the **External Users** tab, select the user whose remote permissions you want to modify.

2. Click **Remote Permissions**.



3. At the top of the **Remote Permissions** dialog box, select the **Allow Remote Login** check box.

   When you have allowed logging in to Tekla EPM Go, you can modify the other remote permissions.

   Note that the **Remote Permissions** has two tabs: **Production Control/ Project Management** and **Inventory/Inspection/Time Tracking**. You need to modify the information on both tabs separately.

   - On the **Production Control/Project Management** tab, you can select which production jobs the user can access remotely, and what information they can view or modify.

- On the **Inventory/Inspection/Time Tracking** tab, you can select what the user can do in the inventory, which inspection test they can view or modify, and what kind of time tracking records they can add. Users can be allowed to only add records for themselves or for all employees, and records that have a late start or end time.

4. On the **Production Control/Project Management** tab, select which production control jobs the user can access. The options are:

   - **None**: the user cannot access the information of any production control job remotely.
   - **Selected**: allows you to select the control jobs that the user can access remotely.

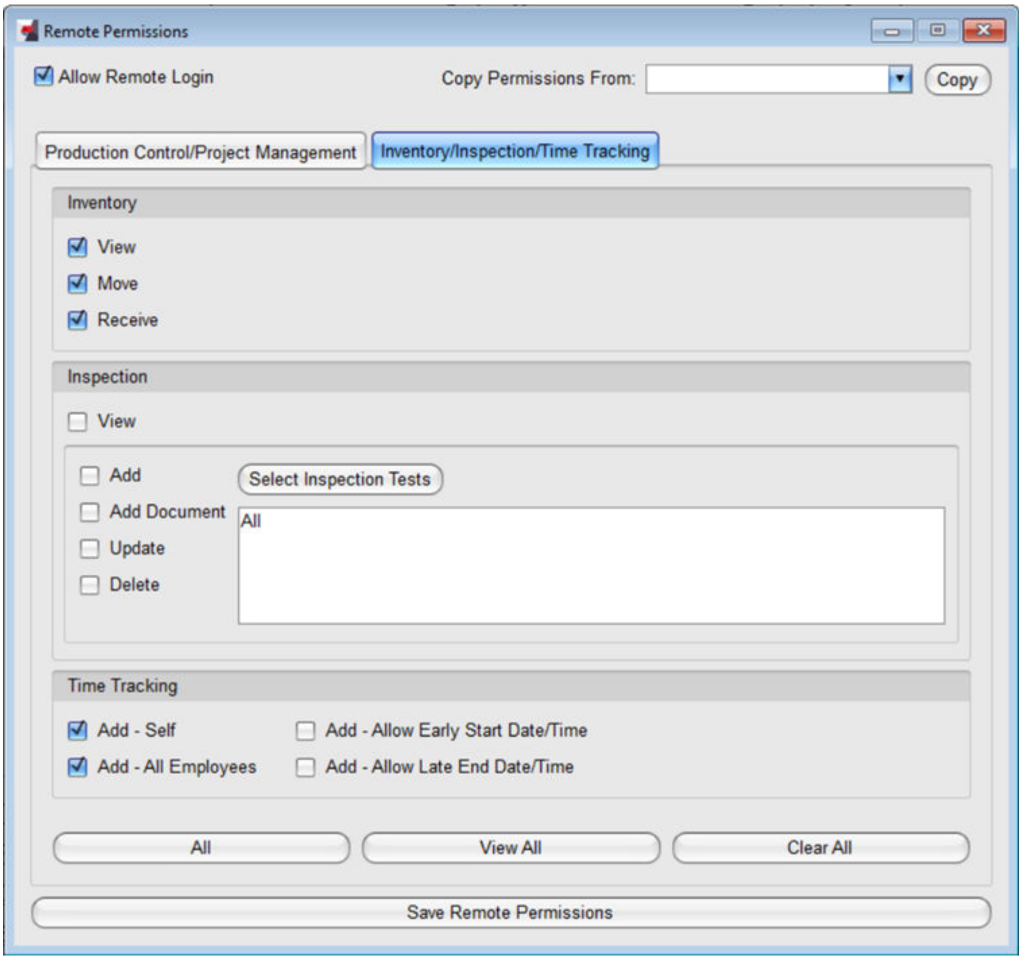
     To select the jobs, click **Edit** in the **Select Jobs** section of the **Production Control/Project Management** tab.
   - **All**: the user can access the information of all production control jobs remotely.

5. On the **Inventory/Inspection/Time Tracking** tab, select which inspection tests the user can access remotely:

   a. Click **Select Inspection Tests**.

   b. Click the arrow buttons to move the items tests that the user needs to access remotely to the **Included** list.

   c. Click **OK**.



6. To modify the user permissions further, do any of the following:

To	Do this
Select the permissions one by one	a. Click a tab at the top of the **Remote Permissions** dialog box to open it. b. Select check boxes next to the permissions that you want to give to the user. Repeat steps a to b on both tabs of the **Remote Permissions** dialog box.
Copy the remote permissions of another user	a. In the upper-right corner of the dialog box, click the arrow on the right side of the **Copy Permissions From** list. b. Select the desired user in the list. c. Click **Copy**.
Select or remove multiple permissions at once	• Do one of the following: • To allow the user to view, but not modify, all information listed on the current tab, click **View All** at the bottom of the dialog box.

To	Do this
	• To remove all permissions that the user has on the current tab, click **Clear All**. Select or remove the permissions on both tabs of the **Remote Permissions** dialog box.
Give all remote permissions on the current tab	• In the lower-left corner of the dialog box, click **All**. Note that to give all available remote permissions, you need to click **All** on both tabs of the **Remote Permissions** dialog box.

7. Click **Save Remote Permissions**.

The user can now view and modify the information according to the remote permissions you gave them.

See also

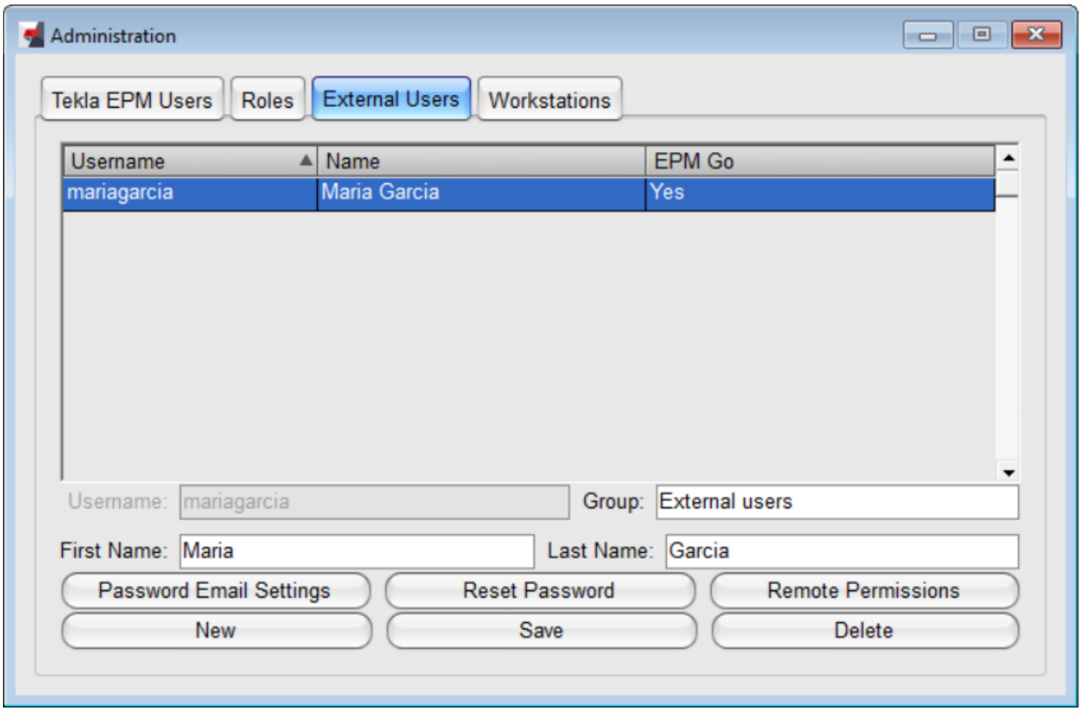
Add, modify, and delete external users (page 25)

Add, modify, and delete external users

Any users who work remotely in your company should be added to Tekla EPM as external users. Administrators can add, modify, and delete external users on the **External Users** tab of the **Administration** dialog box. The passwords of the external users can also be reset.

To manage external Tekla EPM users, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. In the **Administration** dialog box, open the **External Users** tab.



Add an external user

1. On the **External Users** tab of the **Administration** dialog box, click **New**.
2. Define the user properties.

   The properties marked with an asterisk (*) are mandatory information.

Option	Description
Username *	The username with which the external user logs in to Tekla EPM. Type the username in the **Username** field. Note that the username cannot be changed after the external user has been added.
Group	The group to which the external user belongs. For example, you can define groups for estimators and project managers. Note that groups do not allow you to automatically assign permissions to the user. Type the user group in the **Group** field.
First Name, **Last Name**	The first and last name of the external user. Type the appropriate names in the **First Name** and **Last Name** fields.

3. Click **Add**.

4. Do any of the following:

To	Do this
Generate and send an email with the external user's user name and password	a. In the confirmation dialog box, click **Yes**. Microsoft Outlook opens and generates a new email containing the username and password. b. Add the recipient. c. If necessary, modify the default email content. d. Send the email.
Continue without generating and sending an email	a. In the confirmation dialog box, click **No**. A message appears, displaying the password that the user needs to log in to Tekla EPM. b. Highlight and copy the password to send it to the external user. c. Click **OK** to close the message. d. Send the password to the external user in the desired communication channel.

The external user is added to Tekla EPM.

Note that initially, the external user has no access to any information in Tekla EPM. You need to modify the user permissions to give them access to the necessary information and modules. For more information, see Manage remote user permissions (page 21).

Reset the password of an external user

1. On the **External Users** of the **Administration** dialog box, select the external user whose password you want to reset.
2. Click **Reset Password**.
3. To confirm resetting the password, click **Yes** in the first confirmation dialog box.
4. Do any of the following:

To	Do this
Generate and send an email that contains the username and new password of the external user	a. In the second confirmation dialog box, click **Yes**. Microsoft Outlook opens and generates a new email containing the username and new password. b. Add the recipient. c. If necessary, modify the email content.

To	Do this
	d. Send the email.
Continue without generating and sending an email	a. In the second confirmation dialog box, click **No**. A message appears, displaying the password that the user needs to log in to Tekla EPM. b. Highlight and copy the password to send it to the external user. c. Click **OK** to close the message. d. Send the password to the external user in the desired communication channel.

Modify the information of an external user

1. On the **External Users** tab of the **Administration** dialog box, select the external user whose information you want to modify.
2. Modify the group, first name, and last name according to your needs.
3. To modify the user permissions, click **Remote Permissions**.

   For more information, see Manage remote user permissions (page 21).
4. Click **Save** to save the changes.

Delete an external user

1. On the **External Users** of the **Administration** dialog box, select the external user that you want to delete.
2. Click **Delete**.
3. To permanently delete the external user, click **Yes** in the confirmation dialog box.

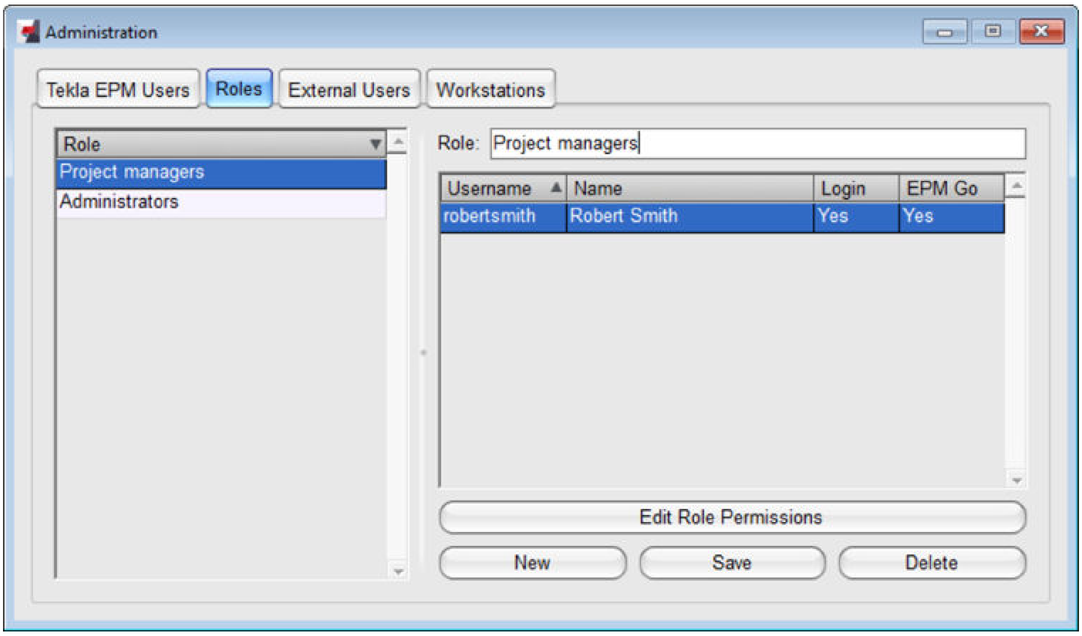
Add, modify, and delete user roles

User roles allow the administrator to quickly assign the same permissions to multiple users. On the **Roles** tab of the **Administration** dialog box, you can add user roles, manage the permissions of the roles, and delete any unnecessary roles. After you have added the necessary user roles and modified the permissions according to your needs, you need to assign the roles to the desired users on the **Tekla EPM Users** tab.

To manage user roles, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.

3. Open the **Roles** tab.

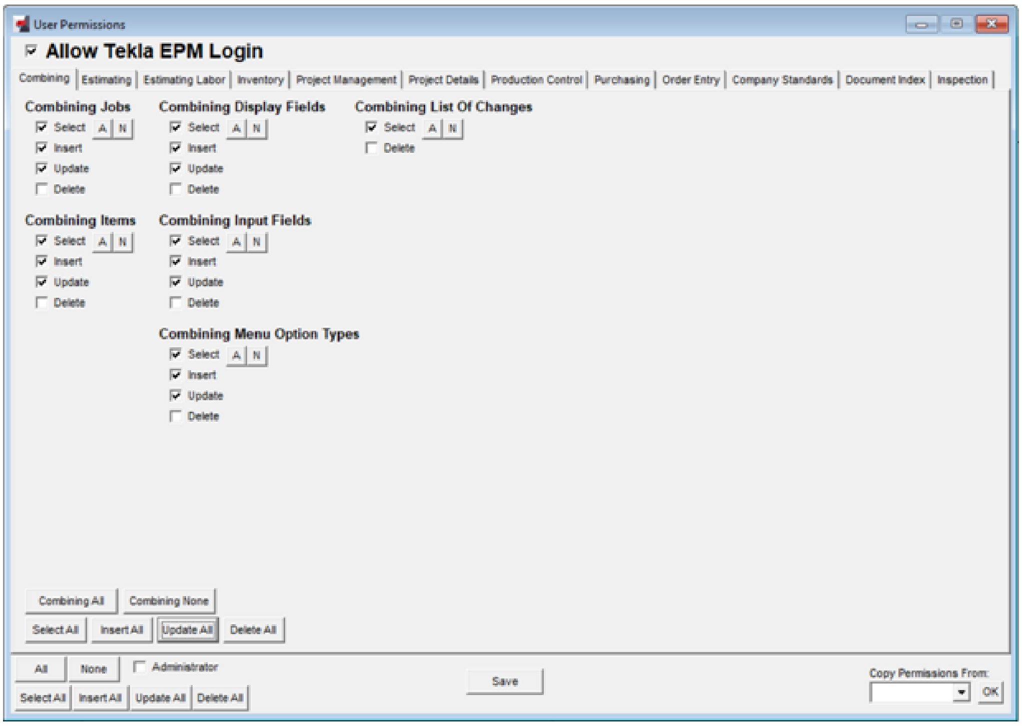


Add a user role

1. On the **Roles** tab of the **Administration** dialog box, click **New**.
2. In the **Role** field, type a name for the user role.

   For example, `Project managers`.
3. Click **Save** to create the role.
4. To manage the permissions of the new user role, click **Edit Role Permissions**.

The **User Permissions** dialog box opens.



The **User Permissions** dialog box has multiple tabs that represent the different modules and features of Tekla EPM. This way, the user permissions can be set separately for each module.

The tabs are divided into sections that represent different parts of the module or feature. This allows you to give the user group permissions to only perform particular actions related to the module.

All sections contain check boxes that determine what the user group can do in that part of the module. The available check boxes are:

- **Select**: When selected, allows the user group to select and filter information, such as material items.
- **Insert**: When selected, allows the user group to add new information.
- **Update**: When selected, allows the user group to modify existing information.
- **Delete**: When selected, allows the user group to delete information.

For example, to allow the user group to select items and add items in a combining job, select the **Select** and **Insert** check boxes in the **Combining Items** section of the **Combining** tab. If only the **Select** and **Insert** check boxes were selected, the user group could not modify or delete combining items, so the **Edit** and **Delete** buttons would not be available.

5. According to your needs, do any of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Select the permissions one by one</td><td>a. Click a tab at the top of the User Permissions dialog box to open it.

b. Select check boxes next to the permissions that you want to give to the user role.

You can also click the A (all) and N (none) buttons to select or clear all check boxes in a section. This way, you can quickly give the user role all or no permissions to that part of the module or feature.

c. Repeat steps a to b on all necessary tabs.</td></tr>
<tr><td>Select multiple permissions at once</td><td>• Do one of the following:

• To allow the user role to perform an action anywhere in the selected module, click the desired button at the bottom of the current tab.

• To allow the user role to perform an action anywhere in Tekla EPM, click the desired button at the bottom of the dialog box.

For example, when the Update All check box is selected at the bottom of a tab, the user role can modify information in all parts of the module.

However, if the Update All check box is selected at the bottom of the User Permissions dialog box, the user role can modify information in all modules of Tekla EPM.</td></tr>
<tr><td>Copy the permissions of a Tekla EPM user</td><td>a. In the lower-right corner of the dialog box, click the arrow on the right side of the Copy Permissions From list.

b. Select the desired user in the list.

c. Click OK.</td></tr>
<tr><td>Give all possible permissions</td><td>• In the lower-left corner of the dialog box, select the Administrator check box.</td></tr>
</table>

6. Click **Save** to save the permissions.
7. To close the **User Permissions** dialog box, click the **Close** button (**X**) in the upper-right corner.
8. In the **Administration** dialog box, click **Save** to update the permissions.

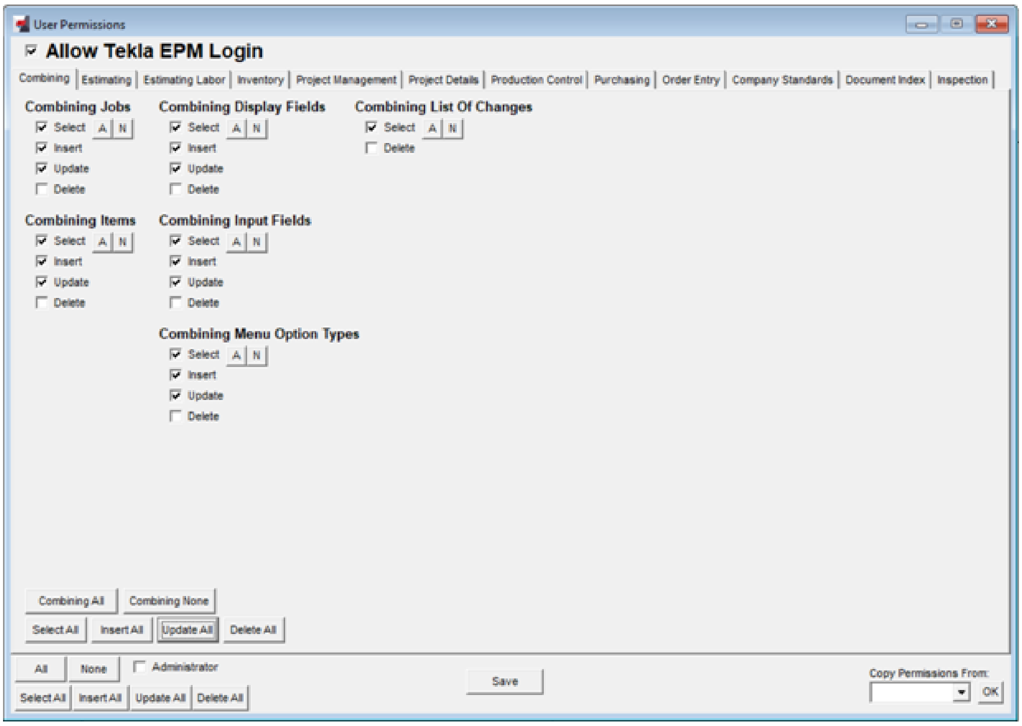
Assign a user role to a user

1. Open the **Tekla EPM Users** tab of the **Administration** dialog box.
2. Select the user for whom you want to assign a user role.
3. Click the arrow on the right side of the **Role** list and select the user role in the list.
4. Click **Save**.

Modify a user role

1. On the **Roles** tab of the **Administration** dialog box, select the role that you want to modify in the left-hand pane.
2. In the **Role** field, modify the name of the user role.
3. To manage the permissions of the user role, click **Edit Role Permissions**.

   The **User Permissions** dialog box opens.

   The **User Permissions** dialog box has multiple tabs that represent the different modules and features of Tekla EPM. This way, the user permissions can be set separately for each module.

   The tabs are divided into sections that represent different parts of the module or feature. This allows you to give the user group permissions to only perform particular actions related to the module.

   All sections contain check boxes that determine what the user group can do in that part of the module. The available check boxes are:

- **Select**: When selected, allows the user group to select and filter information, such as material items.
- **Insert**: When selected, allows the user group to add new information.
- **Update**: When selected, allows the user group to modify existing information.
- **Delete**: When selected, allows the user group to delete information.

For example, to allow the user group to select items and add items in a combining job, select the **Select** and **Insert** check boxes in the **Combining Items** section of the **Combining** tab. If only the **Select** and **Insert** check boxes were selected, the user group could not modify or delete combining items, so the **Edit** and **Delete** buttons would not be available.

4. In the **User Permissions** dialog box, do any of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Select the permissions one by one</td><td>a. Click a tab at the top of the User Permissions dialog box to open it.
b. Select check boxes next to the permissions that you want to give to the user role.
You can also click the A (all) and N (none) buttons to select or clear all check boxes in a section. This way, you can quickly give the user role all or no permissions to that part of the module or feature.
c. Repeat steps a to b on all necessary tabs.</td></tr>
<tr><td>Select multiple permissions at once</td><td>• Do one of the following:
• To allow the user role to perform an action anywhere in the selected module, click the desired button at the bottom of the current tab.
• To allow the user role to perform an action anywhere in Tekla EPM, click the desired button at the bottom of the dialog box.
For example, when the Update All check box is selected at the bottom of a tab, the user role can modify information in all parts of the module.
However, if the Update All check box is selected at the bottom of the User Permissions dialog box, the user role can modify information in all modules of Tekla EPM.</td></tr>
<tr><td>Copy the permissions of a Tekla EPM user</td><td>a. In the lower-right corner of the dialog box, click the arrow on the right side of the Copy Permissions From list.</td></tr>
</table>

To	Do this
	b. Select the desired user in the list. c. Click **OK**.
Give all possible permissions	• In the lower-left corner of the dialog box, select the **Administrator** check box.

5. Click **Save** to save the permissions.

   The changed permissions are immediately applied to all users that have been assigned the role.

6. To close the **User Permissions** dialog box, click the **Close** button (**X**) in the upper-right corner.
7. In the **Administration** dialog box, click **Save** to update the permissions.

Delete a user role

Note that deleting a user role is permanent and cannot be undone.

1. On the **Roles** tab of the **Administration** dialog box, select the role that you want to delete in the left-hand pane.
2. Click **Delete**.
3. To permanently delete the user role, click **Yes** in the confirmation dialog box.

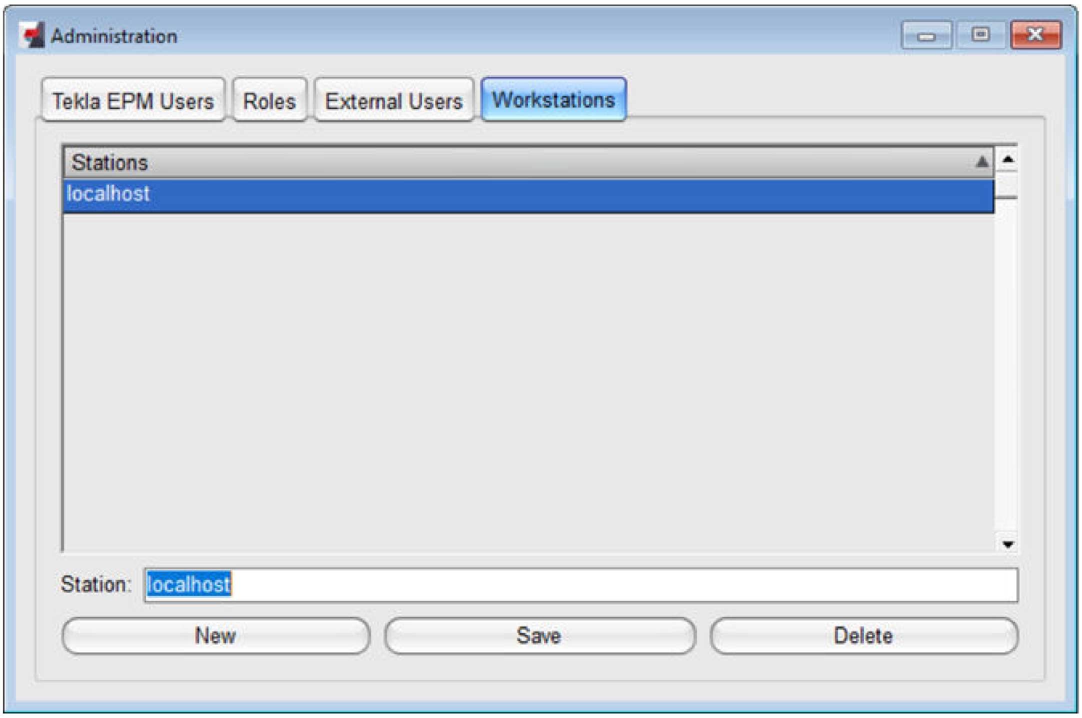
Add, modify, and delete workstations

On the **Workstations** tab of the **Administration** dialog box, you can add new workstations, modify existing workstations, or delete unnecessary workstations. Defining workstations allows creating replicas: when you set up a slave computer, you need to connect one of the previously defined workstations to the slave computer.

For more information on creating replicas, see Create replicas (page 43).

To manage workstations, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Open the **Workstations** tab.



Add a workstation

1. On the **Workstations** tab of the **Administration** dialog box, click **New**.
2. In the **Station** field, type the workstation name or the computer ID.
3. Click **Add**.

Modify a workstation

1. On the **Workstations** tab of the **Administration** dialog box, select the workstation that you want to modify.
2. In the **Station** field, modify the workstation name or the computer ID.
3. Click **Save** to save the changes.

Delete a workstation

1. On the **Workstations** tab of the **Administration** dialog box, select the workstation that you want to delete.
2. Click **Delete**.
3. To permanently delete the workstation, click **Yes** in the confirmation dialog box.

View the users that are logged in

Administrators can use the **Users Currently Logged In** command to view the Tekla EPM users that are currently logged in. This can be useful when trying to run an update from one Tekla EPM version to another, which requires that other users exit Tekla EPM. Administrators can also close other users' Tekla EPM sessions and log them out.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **Users Currently Logged In**.
5. In the **Users Currently Logged In** dialog box, view the users that are currently logged in.

   For users within the office, you can see the IP address of the computer on which the user is logged in and the time that the user has logged in.
6. If necessary, do either of the following:
   - To close a user's Tekla EPM session and log them out, select the user and click **Force Shutdown**.
   - To cancel closing the user's Tekla EPM session and logging them out, click **Cancel Shutdown**.
7. To close the **Users Currently Logged In** dialog box, click the **Close** button (**X**) in the upper-right corner.

Note that you can also use the **Remote Users Currently Logged In** command to view the remote users that are currently logged in.

For remote users, you can see the time that they have logged in and the time of their last activity in Tekla EPM Go. However, you cannot close remote users' Tekla EPM Go sessions or log the users out.

1.4 Adjust settings and company information

Administrators are responsible for adjusting the settings that define how Tekla EPM can be used, defining the company information, and deciding on the default folders for saving Tekla EPM files. Administrators can also create replicas by connecting to off-site computers.

For more information, see the following links:

Define and modify company information (page 37)

Define the administration settings (page 40)

Set the default folders for saving files (page 42)

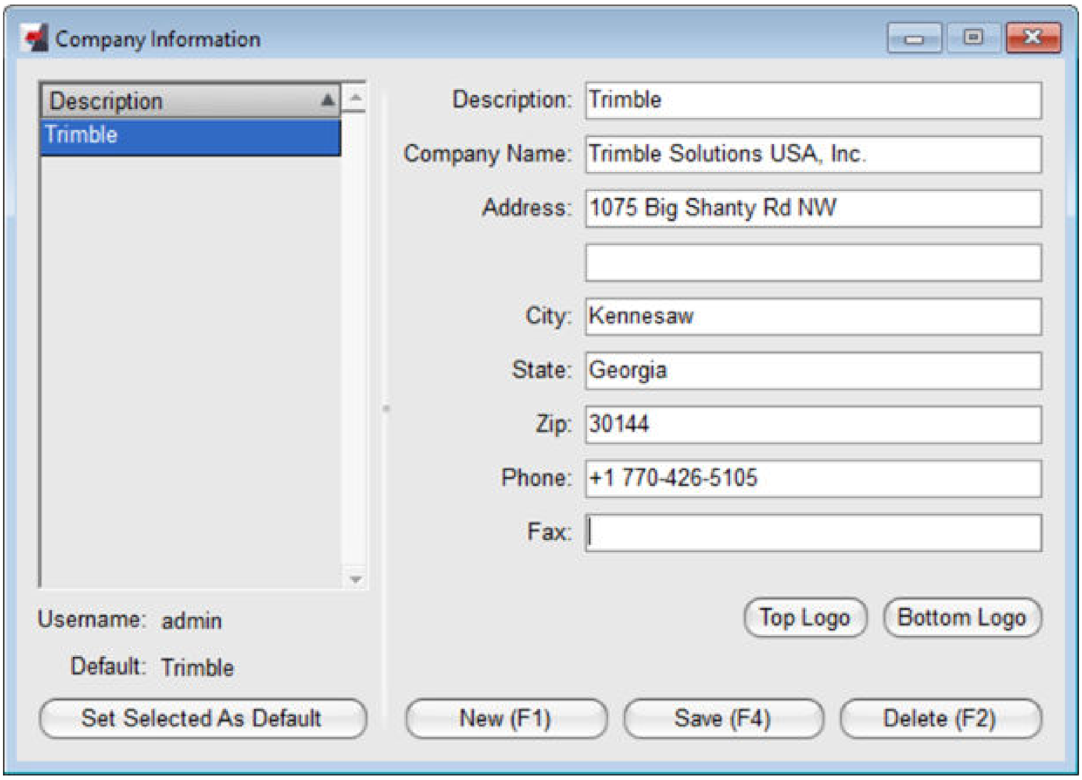
Create replicas (page 43)

Define and modify company information

In the **Company Information** dialog box, you can define the name and contact information of your company. The company information is used in all Tekla EPM modules when you create reports. You can also add multiple companies, if necessary.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Company Information**.

The **Company Information** dialog box opens.



Add company information

1. In the **Company Information** dialog box, click **New**.
2. Add a description for the company.

   For example, `Main`.
3. Define the company name, address, city, state, zip code, phone, and fax according to your needs.

   The company name is mandatory information. All other details are optional.
4. To add a logo for the company, do the following:

a. According to your needs, click one of the following buttons:
   - To place the company logo at the top of the reports, click **Top Logo**.
   - To place the company logo at the bottom of the reports, click **Bottom Logo**.
b. Click **Load From File**.
c. In the **Open** dialog box, browse to find the logo file, and select it.

   Note that the logo file needs to be a .bmp, .jpg, or .png file. We recommend using the .jpg format because logo files in any other format are converted to .jpg when you add them.

   The maximum height for the logo file is 3 inches, or 76,2 mm, at 96 pixels per inch. A maximum width is not enforced, but we recommend that you use a logo file that is narrower than the standard paper size of your company.
d. Double-click the logo file, or click **Open**.
e. Select if the logo should be aligned left, center, or right.

The logo is added for the company.

Note that if you want to use another logo file instead, you need to click **Top Logo** or **Bottom Logo** again, and click **Clear** in order to delete the current logo file.

5. Click **Add**.

The company is added to the list.

Note that you can add multiple companies, if necessary. For example, if you want the **Shipped From** location to be something other than the address of your main company, you need to add another company with that name and address. These can be the name and address of a vendor or a supplier.

You can change which one of the available companies is used in the **Report Types** dialog box.

Set the default company

If you have added multiple companies, you should set one of the companies as the default company used in reports.

Note that you can only set the default company for the current user.

1. In the **Company Information** dialog box, select the company that you want to set as the default company.
2. At the bottom of the dialog box, click **Set Selected As Default**.
3. To confirm using the selected company as the default option, click **Yes** in the confirmation dialog box.

The selected company is set as the default company used in reports.

Note that the default company is shown in the **Default** field at the bottom of the **Company Information** dialog box.

You can change which one of the available companies is used in the **Report Types** dialog box.

Modify company information

1. In the **Company Information** dialog box, select the company that you want to modify.
2. Modify the company description, name, address, city, state, zip code, phone, and fax according to your needs.
3. To modify the logo for the company, do the following:
   a. According to your needs, click one of the following buttons:
      - To modify the company logo at the top of the reports, click **Top Logo**.
      - To modify the company logo at the bottom of the reports, click **Bottom Logo**.

   b. Click **Clear** to delete the existing logo file.

   c. Click **Load From File**.

   d. In the **Open** dialog box, browse to find the logo file, and select it.

      Note that the logo file needs to be a .bmp, .jpg, or .png file. We recommend using the .jpg format because logo files in any other format are converted to .jpg when you add them.

      The maximum height for the logo file is 3 inches, or 76,2 mm, at 96 pixels per inch. A maximum width is not enforced, but we recommend that you use a logo file that is narrower than the standard paper size of your company.

   e. Double-click the logo file, or click **Open**.

   f. Select if the logo should be aligned left, center, or right.

   The logo is added for the company.
4. Click **Save** to update the company information.

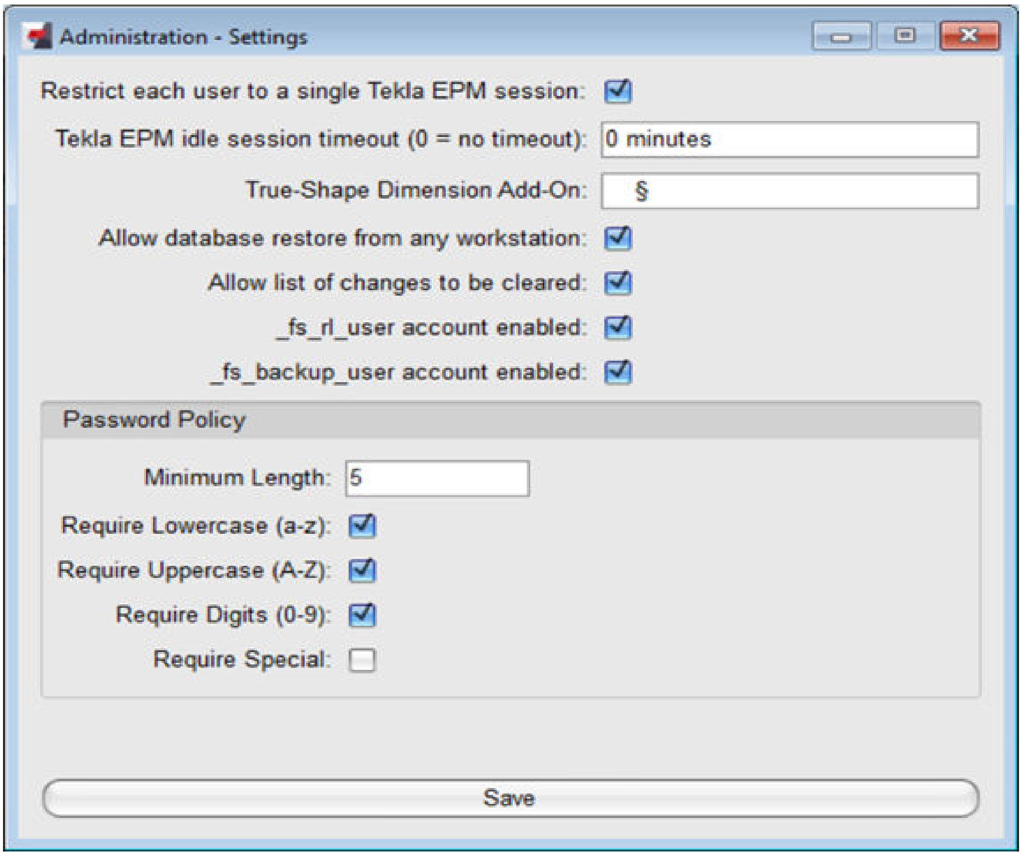
Delete company information

1. In the **Company Information** dialog box, select the company that you want to delete.
2. Click **Delete**.
3. To permanently delete the selected company and its information, click **Yes** in the confirmation dialog box.

Define the administration settings

In the **Administration - Settings** dialog box, administrators can define in which way Tekla EPM can be used. For example, administrators can only allow each user to have one Tekla EPM session open at a time. In addition, administrators can define a password policy that all Tekla EPM passwords need to follow.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **Settings**.



5. In the **Administration - Settings** dialog box, define the settings according to your needs:

Option	Description
Restrict each user to a single Tekla EPM session	When selected, Tekla EPM users can only have one Tekla EPM session open at the same time. When cleared, Tekla EPM users can have multiple Tekla EPM sessions open at the same time.

Option	Description
Tekla EPM idle session timeout	Allows you to define the number of minutes that a Tekla EPM user can remain inactive before the user's session times out and the user is logged out. Type the number of minutes in the **Tekla EPM idle session timeout** field. If you do not want sessions to time out, type `0` in the **Tekla EPM idle session timeout** field.
True-Shape Dimension Add-On	The symbol that is displayed at the end of dimensions if a plate item has a CNC file attached to it and the actual shape of the item in the CNC file is not a rectangle. For example, if a plate is triangular, Tekla EPM will know the true shape, although it cannot be shown in the item dimensions.
Allow database restore from any workstation	When selected, allows administrators to restore the Tekla EPM database using any workstation. When cleared, the Tekla EPM database can only be restored on the server computer. For more information, see Restore the Tekla EPM database (page 57).
Allow list of changes to be cleared	When selected, allows administrators and other users with the correct user permissions to clear the list of changes in a particular Tekla EPM module. When cleared, the list of changes cannot be cleared in any module, even by administrators or users that have the correct permissions.
_fs_rl_user account enabled	When selected, a built-in user login is enabled, allowing the Tekla EPM Remote Server to connect to the Tekla EPM database without adding the user and password in the monitor settings. When cleared, the built-in user login is disabled, so the Tekla EPM Remote Server cannot connect to the Tekla EPM database without adding the username and password in the monitor settings.
_fs_backup_user account enabled	When selected, a built-in user name and password are enabled, so that Tekla EPM can perform scheduled backups from the server computer without a username and password. When cleared, Tekla EPM cannot perform scheduled backups from the server computer without a username and a password.

6. In the **Password Policy** section of the **Administration - Settings** dialog box, define the minimum length for Tekla EPM passwords and select the check boxes for the characters that all Tekla EPM passwords need to contain.

   If no password policy is defined, any passwords can be used. Note that Tekla EPM passwords are always case-sensitive.
7. Click **Save** to save the settings.

Set the default folders for saving files

Use the **Default Directories** dialog box to select the folders where Tekla EPM saves information by default.

We recommend that each Tekla EPM user on each workstation sets the same folders on the Tekla EPM server as default folders, so that sharing information is easy. If some users cannot see the same files that the other users, this might be because they are not using the same default folders as the other users.

Server computers point to folders on the `C:\` drive. Client computers point to the same shared path to the server computer.

Note that client computers that have paths starting with `C:\` are pointing to the `C:\` drives on their own computers, so they cannot view the shared folders.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Default Directories**.

   The **Default Directories** dialog box opens. Here, you need to set the default folders for the following content:

   - **Backup**: Tekla EPM database backup files
   - **Export**: all exported files
   - **Import**: all imported files, except for drawing files
   - **Log**: import log and error log text files
   - **Document Index**: all files saved in the **Document Index**
   - **Drawing**: imported drawing files
   - **Update**: Tekla EPM update files
   - **Custom Report**: all customized report files
3. To change the default folders, do the following:
   a. Click **...** on the right side of a field.

b. In the **Browse For Folder** dialog box, browse to find the folder that you want to set as the default folder.

   If necessary, you can add a new folder under the currently selected one by clicking **Make New Folder**.

c. Select the folder.

d. Click **OK**.

Repeat steps a to d to set all necessary default folders.

4. To update the default folders, click **OK**.

Create replicas

In the **Replication** dialog box, administrators can connect to workstations in an off-site location to share Tekla EPM files and activity. Note that the off-site workstation needs to have Tekla EPM installed in order to connect. The Tekla EPM on the off-site workstation then becomes a slave to the server it is connected to. You can also delete any existing slave workstations, if necessary.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **Replication Administration**.
5. In the **Replication** dialog box, click **New Slave**.
6. At the bottom right corner of the dialog box, click the arrow buttons to move the workstations that you want to connect to the selected slave workstation to the **Stations Connecting** list.
7. To save the changes, click **Save Stations**.

1.5 Update Tekla EPM

Administrators can either update Tekla EPM automatically for all users in their company, or update Tekla EPM manually for each workstation in the company.

For more information, see the following links:

Update Tekla EPM automatically (page 43)

Update Tekla EPM manually (page 45)

Update Tekla EPM automatically

Each time Tekla EPM is started on any client workstation, Tekla EPM looks for automatic updates in the **Update** default folder, set in the **Default Directories** dialog box. Administrators need to download the available updates to the **Update** folder and install the update. Once the update has been installed on the server computer, all users can update Tekla EPM automatically by simply clicking **OK**.

NOTE To enable automatic updates:

- All workstations must have the same version of Tekla EPM as the server computer to connect and share the same data. Otherwise, errors will occur.

  If these types of errors occur, contact the Tekla EPM support.

- All computers need to have the same path in the **Update** field in the **Default Directories** dialog box. Otherwise, the automatic update will not succeed.

Before you begin updating Tekla EPM, ensure that all users have closed Tekla EPM, and that the Tekla EPM Remote Monitor has been stopped on the server computer.

1. Verify where the **Update** default directory points to:

   a. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.

   b. In the **File** menu, select **Default Directories**.

   c. In the **Default Directories** dialog box, check the file path in the **Update** field.

      This is the location where you need to save the update.

      If the **Update** field is empty, click **...**, browse to find the desired folder, select the folder, and click **OK**.

   d. Click **OK** to close the **Default Directories** dialog box.

2. Download the desired update from downloads.tekla.com to the correct folder.
3. Close Tekla EPM.
4. Go to the location where you downloaded the update, and double-click the update.
5. In the **Tekla EPM License Agreement** wizard, review the license agreement.
6. Select **Accept**.
7. At the bottom-right corner, click **Next >**.
8. In the **Destination Folder** field, check the location where the update will be installed.

9. To install the update, click **Install**.

   The update is installed.

10. When the update has been installed, click **Close** to close the installation window.

    A dialog box opens, allowing you to select if you want to start the updated Tekla EPM and verify that everything works as expected.

11. Click **Yes**.

12. Log in to Tekla EPM.

    Note that sometimes when you log in to Tekla EPM after an update, you may get the following messages:

    a. A message saying that the current database needs to be updated.

       Click **OK**.

    b. A message confirming that the database should be updated.

       Click **Yes**.

    c. A message asking you to allow creating a backup copy of the current database.

       Click **OK**, create a backup, and save it to the desired location.

13. Open a client workstation and log in to Tekla EPM.

    A message appears, advising you to update Tekla EPM.

14. Click **OK**.

    The program update starts immediately.

The Tekla EPM Remote Server automatically starts on the server computer after Tekla EPM has been updated.

See also

Set the default folders for saving files (page 42)

Update Tekla EPM manually (page 45)

Update Tekla EPM manually

If the **Update** folder has not been defined in the **Default Directories** dialog box, users need to update Tekla EPM on each client workstation manually.

Note that to connect and share information, all workstations in your company need to have the same version of Tekla EPM as the server computer.

1. Download the desired update from downloads.tekla.com.

2. Close Tekla EPM.

3. Go to the location where you downloaded the update, and double-click the update.
4. In the **Tekla EPM License Agreement** wizard, review the license agreement.
5. Select **Accept**.
6. At the bottom-right corner, click **Next >**.
7. In the **Destination Folder** field, check the location where the update will be installed.
8. If you want to install the update to another folder, do the following:
    a. Click **Browse**.
    b. In the **Browse For Folder** dialog box, browse to the folder in which you want to install the update, and select it.
    c. Click **OK**.
9. To install the update, click **Install**.

    The update is installed.
10. When the update has been installed, click **Close** to close the installation window.

    A dialog box opens, allowing you to select if you want to start the updated Tekla EPM and verify that everything works as expected.
11. Click **Yes**.
12. Log in to Tekla EPM.

    Note that sometimes when you log in to Tekla EPM after an update, you may get the following messages:
    a. A message saying that the current database needs to be updated.

        Click **OK**.
    b. A message confirming that the database should be updated.

        Click **Yes**.
    c. A message asking you to allow creating a backup copy of the current database.

        Click **OK**, create a backup, and save it to the desired location.

Tekla EPM will continue to update any information that needs to be updated.

You can now start working in the updated version of Tekla EPM.

1.6 Use Tekla EPM with other products

You can use Tekla EPM together with other software products. For example, you can link Tekla EPM to Trimble Connect in order to view and modify IFC models, or download useful content from Tekla Warehouse to Tekla EPM. In addition, you can integrate Tekla EPM with various other software, such as your accounting software or an external multing software.

For more information, see the following links:

Link Tekla EPM to Trimble Connect (page 47)

Use Tekla EPM together with Tekla Warehouse (page 54)

Link Tekla EPM to Trimble Connect

To use Trimble Connect for viewing IFC models for estimating and production control jobs, you need to link Tekla EPM and Trimble Connect to each other. To enable updating the statuses of Tekla EPM items to Trimble Connect, you also need to set up status sharing.

Linked jobs in the **Estimating**, **Production Control**, and **Project Management** modules can all be linked to a Trimble Connect project.

Note that if an estimating or production control job is linked to a project management job, the Trimble Connect project is managed through the project management job. In this case, you need to link the project management job to Trimble Connect. The link is then applied to any linked estimating and production control jobs. The Trimble Connect project cannot be modified when you access it through the estimating or production control job.

See also

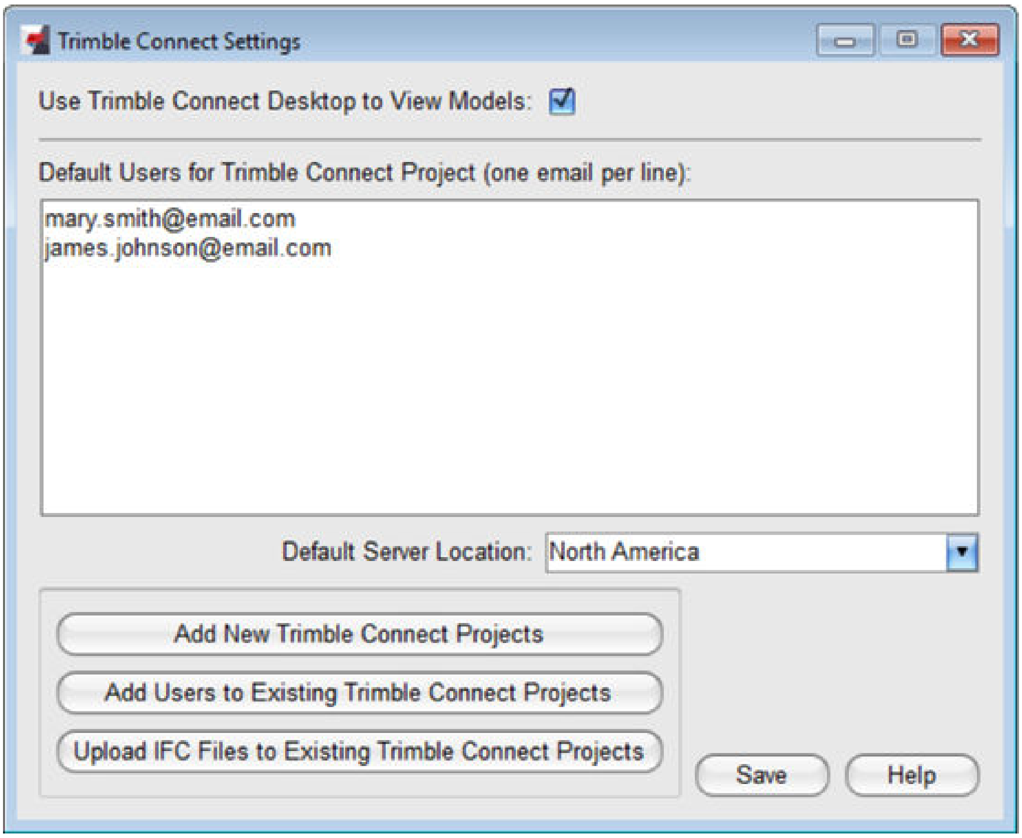
Add Trimble Connect projects (page 50)

Add users to Trimble Connect projects (page 51)

Send Fabsuite View projects to Trimble Connect (page 53)

Link Tekla EPM to Trimble Connect

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Integration Settings** --> **Trimble Connect** .



3. If you have not yet migrated to licensing (page 9), in **Trimble Connect Settings** dialog box, select the **Use Trimble Connect Desktop To View Models** check box.
4. To invite users to participate in your Trimble Connect projects, type their emails on separate lines in the **Default Users for Trimble Connect Project** section.

   The users whose email addresses you type here can later be added to existing Trimble Connect projects. For more information, see Add users to Trimble Connect projects (page 51).
5. If necessary, click the arrow on the right side of the **Default Server Location** list, and change the server location.
6. Click **Save**.

Note that you need to restart Tekla EPM to be able to use Trimble Connect for viewing IFC models.

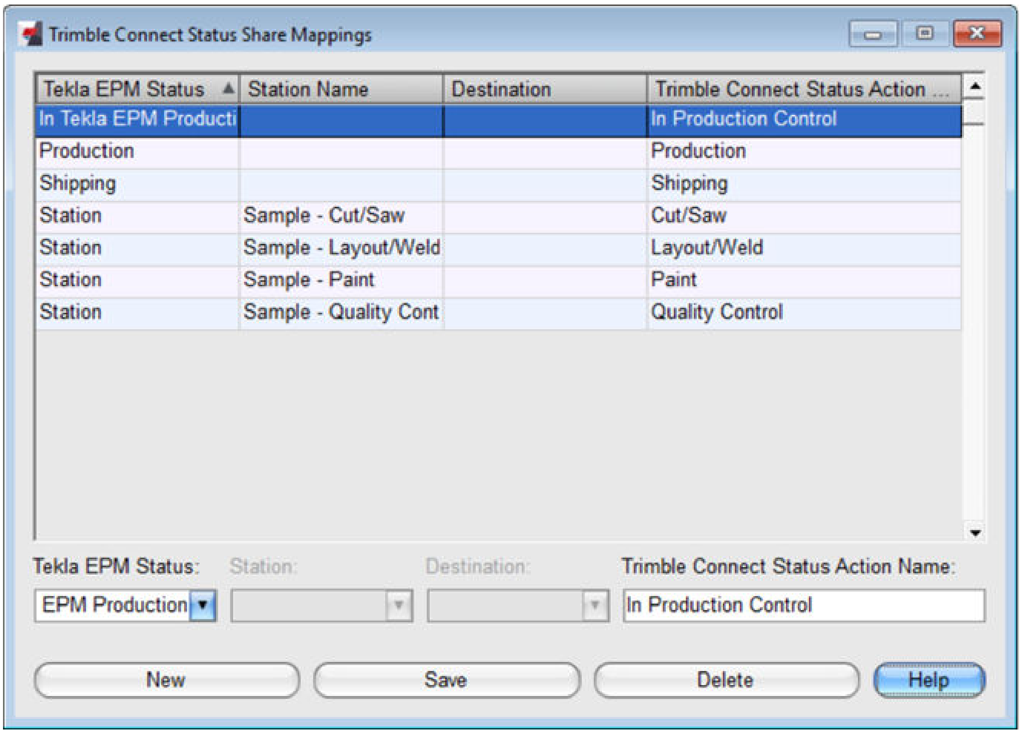
Set up status sharing with Trimble Connect

You can enable sharing the statuses of production control jobs to Trimble Connect.

The available status types are:

- **Purchasing**: **None**, **Started** (on a purchase order but not yet received), **Completed**
- **Production**: **None** (production not started), **Started**, **Completed**
- **Station**: can include all or any individual stations set up in Tekla EPM. For more information, see .
- **Shipping**: **None**, **Started** (at an intermediate shipping destination), or **Completed**
- **Destination**: can include or any individual destinations set up in Tekla EPM. For more information, see .
- **In Tekla EPM Production**: items highlighted with green are in the production control job.
- **In Tekla EPM Estimating**: items highlighted with green are in the estimating job.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Integration Settings** --> **Trimble Connect Status Share** .



3. In the **Trimble Connect Status Share Mappings** dialog box, create the status types that can be shared to Trimble Connect:
   a. Click **New**.
   b. Click the arrow on the right side of **Tekla EPM Status** list, and select a status.

c. Depending on the selected status, click the arrow on the right side of the **Station** or **Destination** list, and select an option in the list.

d. In the **Trimble Connect Status Action Name** field, type the name used for the status in Trimble Connect.

e. Click **Add**.

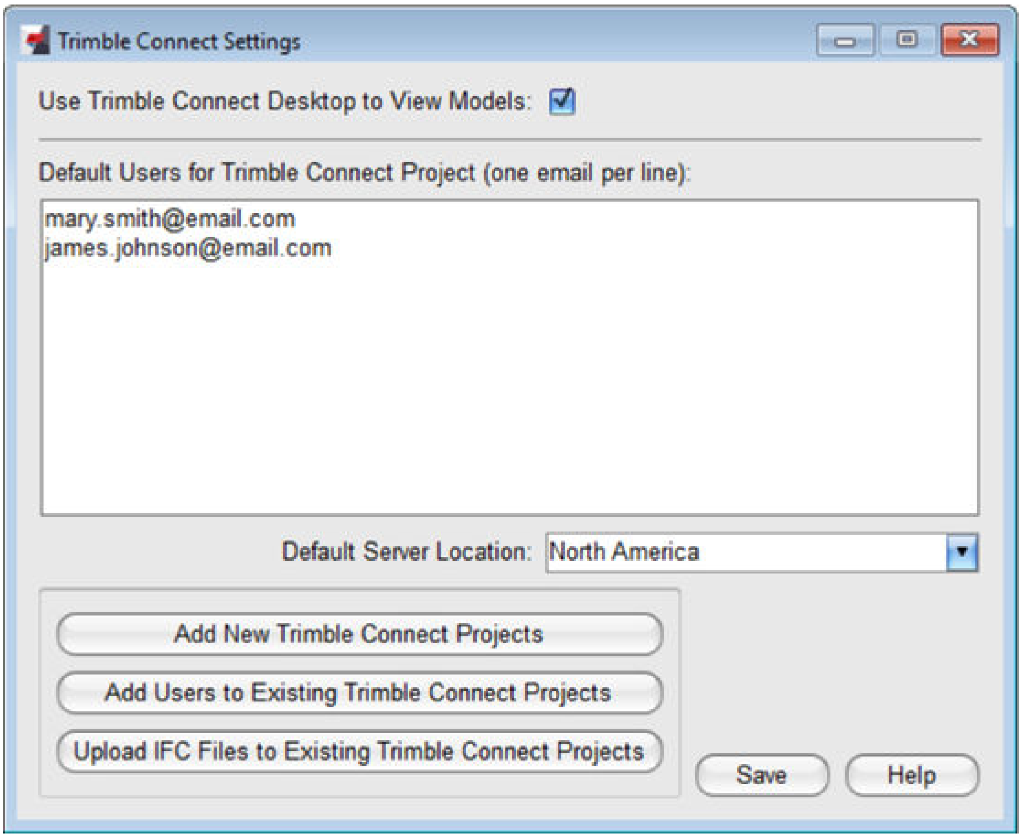
Repeat steps a to e for each status that you want to add.

4. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Add Trimble Connect projects

Use the **Add New Trimble Connect Projects** command to create Trimble Connect projects based on the existing project management jobs.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Integration Settings** --> **Trimble Connect** .



3. In the **Trimble Connect Settings** dialog box, click **Add New Trimble Connect Projects**.
4. In the **Select Project** dialog box, click the arrow buttons to move the production control jobs that you want to add as projects to the **Included** list.

5. Click **OK**.
6. In the **Add Users to Project** dialog box, click the arrow buttons to move the users that need access to the new project to the **Included** list.

   All users that are set as default Trimble Connect users are automatically in the **Included** list.
7. Click **OK**.
8. In the **Status** dialog box, view the project creation process.
9. When the setup is completed, click **OK** to close the **Status** dialog box.
10. To attach an IFC model to the project, do the following:
    a. Open Trimble Connect for Desktop.
    b. Double-click the new project to open it.
    c. In the **Explorer** side pane on the left, click the **Add File** button.
    d. In the **Add Files** dialog box, browse to find the IFC model.
    e. Select the IFC model and click **Open**.

See also

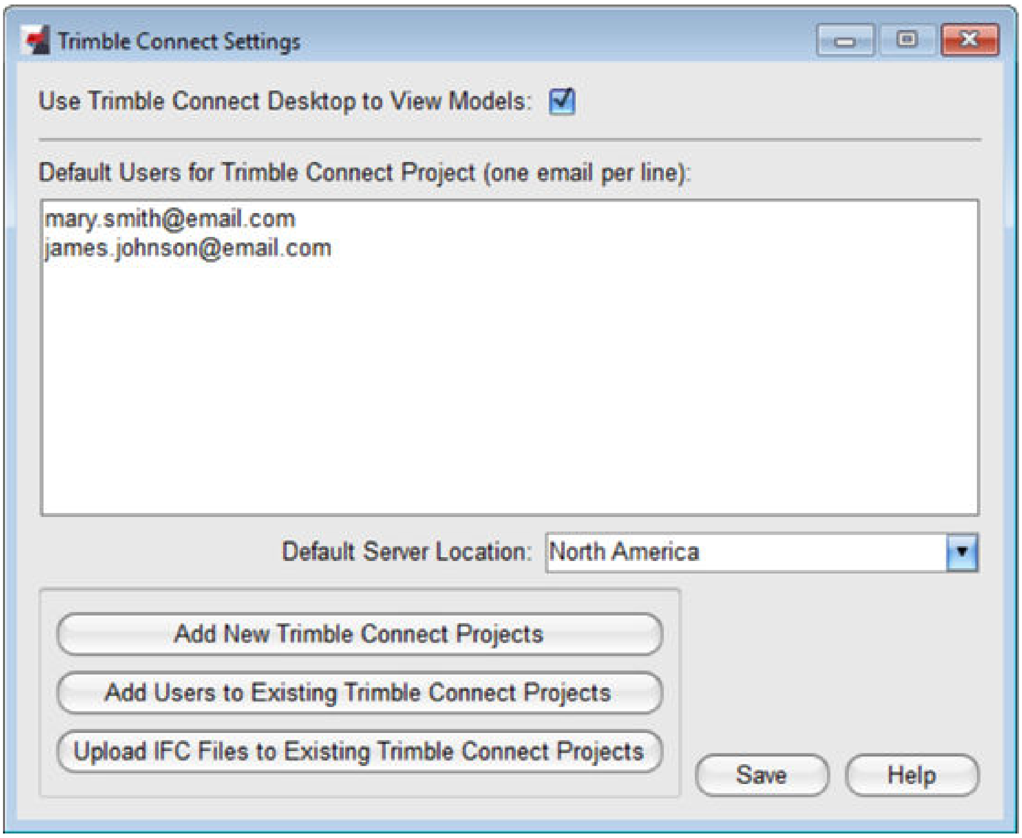
Add users to Trimble Connect projects (page 51)

Send Fabsuite View projects to Trimble Connect (page 53)

Add users to Trimble Connect projects

Use the **Add Users to Existing Trimble Connect Projects** command to invite users to participate in specific Trimble Connect projects.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Integration Settings** --> **Trimble Connect** .



3. In the **Trimble Connect Settings** dialog box, click **Add Users to Existing Trimble Connect Projects**.
4. In the **Add Users to Project** dialog box, click the arrow buttons to move the users that need access to the project to the **Included** list.

   The users in the **Included** list receive email invitations to the projects you select.
5. Click **OK**.
6. In the **Select Project** dialog box, click the arrow buttons to move the projects to which you want to add the selected users to the **Included** list.
7. Click **OK**.
8. In the **Status** dialog box, view the user invitation process.
9. When the setup is completed, click **OK** to close the **Status** dialog box.

The selected users have now been sent email invitations to the selected Trimble Connect projects.

See also

Add Trimble Connect projects (page 50)

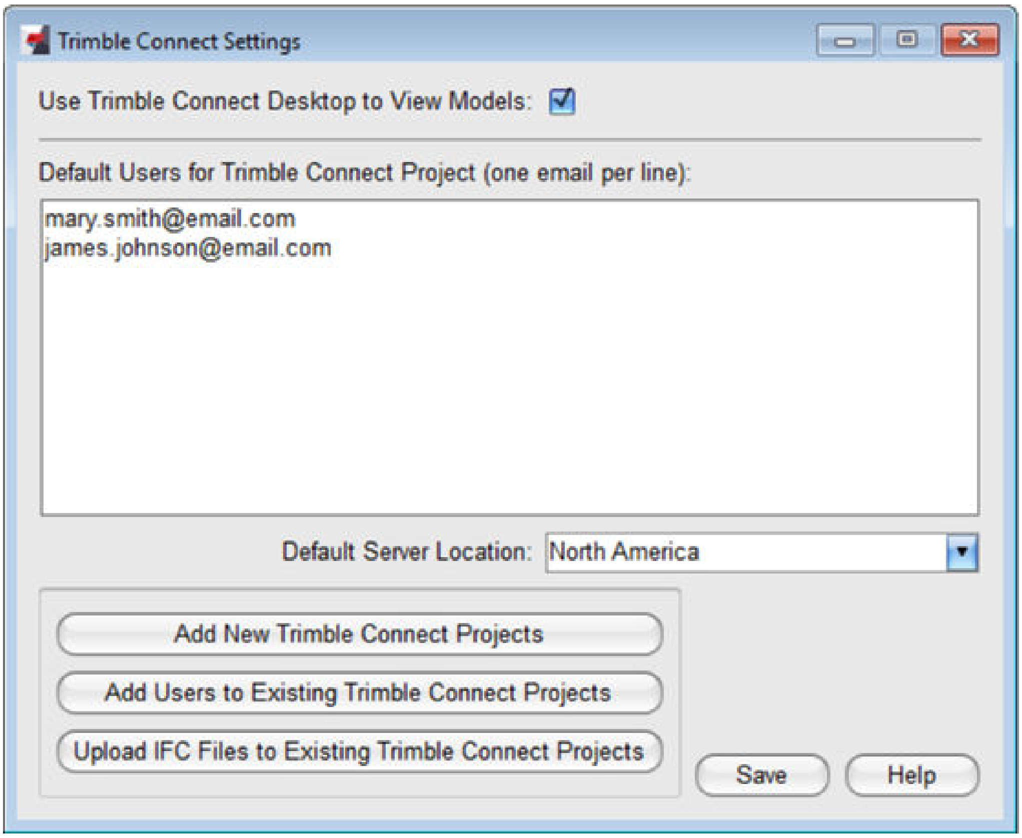
Send Fabsuite View projects to Trimble Connect (page 53)

Send Fabsuite View projects to Trimble Connect

Use the **Upload IFC Files to Existing Trimble Connect Projects** command to send existing Tekla EPM View projects to Trimble Connect.

NOTE To add IFC models to new Trimble Connect projects, we recommend that you add the IFC models directly to the project in Trimble Connect. This way, Trimble Connect can manage the versions of the IFC model.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Integration Settings** --> **Trimble Connect** .



3. In the **Trimble Connect Settings** dialog box, click **Upload IFC Files to Existing Trimble Connect Projects**.
4. In the **Status** dialog box, view the project creation process.

   A message appears, telling you that the project has been successfully created.
5. To close the **Message** dialog box, click **OK**.
6. To close the **Status** dialog box, click **OK**.

See also

Add Trimble Connect projects (page 50)

Add users to Trimble Connect projects (page 51)

Use Tekla EPM together with Tekla Warehouse

Tekla Warehouse is a service for collaboration, and for storing and sharing content used for Tekla Structures and Tekla EPM.

Tekla Warehouse provides centralized access to a wide range of content that you can use in Tekla Structures and Tekla EPM.

For example, you can download the Workflow Tools for Tekla Structures application from Tekla Warehouse to allows showing the statuses of items pushed from Tekla EPM to Trimble Connect in the related Tekla Structures model. Similarly, downloading Workflow Tools for Trimble Connect Desktop allows showing the statuses of items pushed from Tekla EPM to Trimble Connect in Trimble Connect for Desktop.

Note that you need to have a Trimble Identity to download content from Tekla Warehouse.

To access Tekla Warehouse, go to https://warehouse.tekla.com/.

For more information on Tekla Warehouse, see Getting started with Tekla Warehouse.

See also

Manage Trimble Identities and Tekla Online licenses (page 10)

1.7 Export labor information

Use the **Export Labor** command to create a text file with the values set in a labor database. Exporting labor information allows you to view the currently set labor times.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Export Labor**.
3. If you have created multiple labor databases, in the **Shop Setup** dialog box, select the shop whose labor information you want to export.
4. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
5. If necessary, modify the file name.
6. Click **Save**.

The labor database information is converted to a text file and saved in the selected location.

If necessary, you can import the labor information to a different Tekla EPM database.

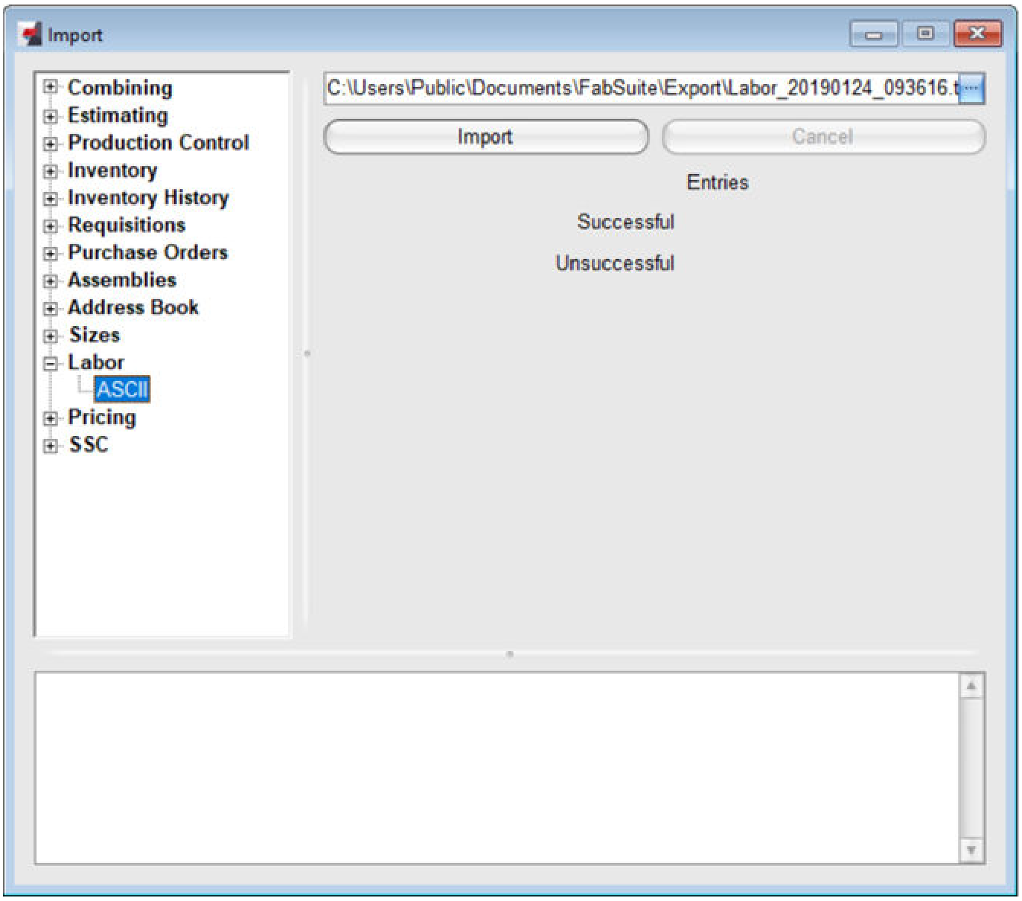
See also

Import labor information to Tekla EPM (page 55)

Import labor information to Tekla EPM

To import labor information from a text file to Tekla EPM, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Import**.
3. In the navigation tree on the left side of the **Import** dialog box, select **Labor** --> **ASCII** .



4. Click the **...** button.
5. In the **Open** dialog box, browse to find the text file that you want to import.

6. Select the file and click **Open**.
7. Click **Import**.
8. If you have created multiple labor databases, in the **Select Shop Setup** dialog box, select the labor database to which you want to import the labor information.
9. Click **OK**.
10. In the confirmation dialog box, do one of the following:
    - To confirm deleting the current labor information and replacing it entirely with the imported information, click **Yes**.
    - To only replace the information included in the imported file, click **No**.

      Use this option to import text files that only contain part of the labor information.
11. In the **Import** dialog box, view the status of the import process.

    If necessary, you can view the import details and errors in a text file by clicking the **Open Import Log** button.
12. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Export labor information (page 54)

1.8 Manage the Tekla EPM database

Administrators can manage the Tekla EPM database in multiple ways: save backup copies of the database, use a backup copy restore a compromised database, compress the database, clear information on user activity from log tables, or recover previously deleted jobs or import backup files.

For more information, see the following links:

Save a backup copy of the Tekla EPM database (page 56)

Restore the Tekla EPM database (page 57)

Compress the Tekla EPM database (page 58)

Clear all information from log tables (page 58)

Recover deleted files (page 59)

Save a backup copy of the Tekla EPM database

We recommend that administrators save backup copies of the Tekla EPM database regularly. This way, the database can be restored if it has been compromised.

NOTE The best way to ensure reliable database backups is using the automated event for creating automatic backups. For more information, see .

---

1. Close all dialog boxes that you have open in Tekla EPM.
2. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
3. In the **File** menu, select **Backup Database**.
4. In the **Backup** dialog box, move the slider to select the desired backup level.
5. Click **Backup**.
6. In the **Save As** dialog box, browse to the location where you want to save the backup file.
7. If necessary, modify the name of the backup file.
8. Click **Save**.

Tekla EPM copies all database information to the selected folder. You can use the saved backup file to restore the Tekla EPM database, if necessary.

See also

Restore the Tekla EPM database (page 57)

Restore the Tekla EPM database

Administrators can use the **Restore Database** command to replace the Tekla EPM database with a previously saved backup copy. This can be useful if the database has been compromised, or if the database needs to be moved from one server to another.

1. Ensure that all other users have logged out of Tekla EPM.
2. Close all dialog boxes that you have open in Tekla EPM.
3. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
4. In the **File** menu, select **Restore Database**.
5. In the **Open** dialog box, browse to find the backup file that you want to use.
6. Select the file and click **Open**.

7. To replace all existing information in the Tekla EPM database with the information in the backup file, click **Yes** in the confirmation dialog box.

   Tekla EPM restores the database.
8. In the **Message** dialog box, click **OK** to close Tekla EPM.
9. To use the restored database, restart Tekla EPM and log in.

See also

Save a backup copy of the Tekla EPM database (page 56)

Compress the Tekla EPM database

Administrators can use the **Optimize Tables** command to compress the Tekla EPM database.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **Optimize Tables**.

   The **Optimize Tables** dialog box opens, and the compression process starts.

   The more information is saved into Tekla EPM, the longer the compression process takes.
5. In the **Optimize Tables** dialog box, review the result of the compression process.
   - **Optimized** shows the number of files that were compressed.
   - **Optimization Not Required** shows the number of files that did not need to be compressed.
   - **Errors Found** shows the number of errors that were found in the compression process. The errors are also listed in the **Optimize Tables** dialog box.
6. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Clear all information from log tables

All actions that are performed in Tekla EPM are saved in log tables. Administrators can use the **Clear Log Tables** command to manually clear extra logs from particular actions made by the Tekla EPM in the company.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.

2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select **Clear Log Tables**.
5. To confirm clearing the log tables, click **Yes** in the confirmation dialog box.

Recover deleted files

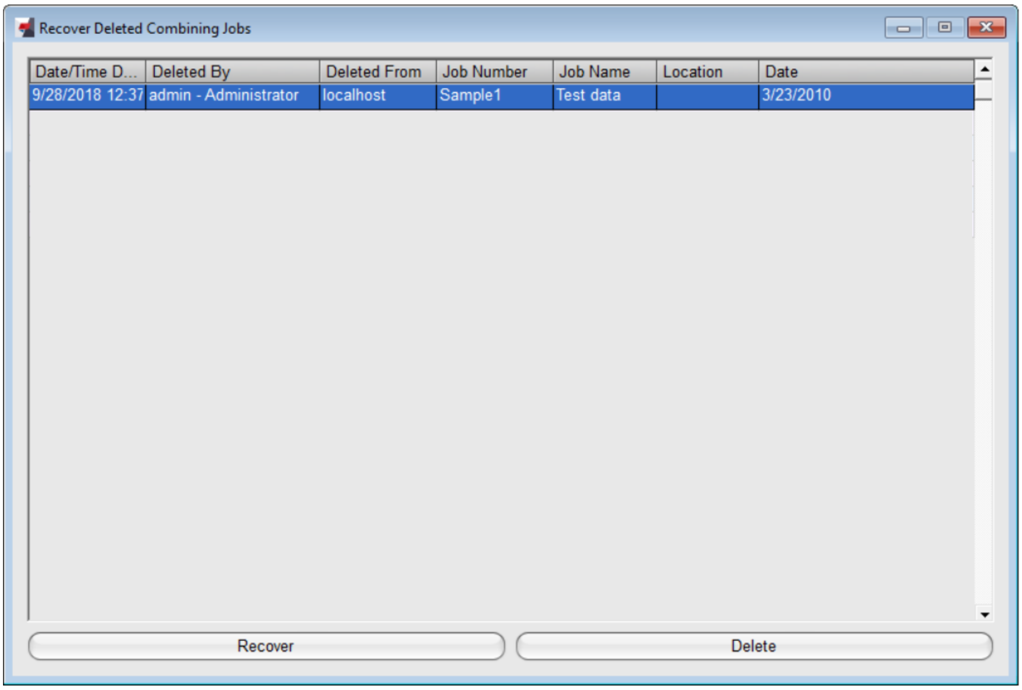
When a user deletes a combining job, estimating job, or a production control job, Tekla EPM saves the jobs in the Tekla EPM database as KISS files. Administrators can recover the deleted combining jobs, estimating jobs, and production control jobs within 30 days of deleting the job.

To access the recovering options, do the following:

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.

Recover jobs

1. In the menu, select any of the following depending on the job type:
   - **Recover Deleted Combining Jobs**
   - **Recover Deleted Estimating Jobs**
   - **Recover Deleted Production Control Jobs**



2. In the recovering dialog box that opens, select the jobs that you want to recover.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

3. Click **Recover**.

   A message opens, informing you that Tekla EPM will create KISS files for the selected jobs. You can then import the KISS files back to Tekla EPM to view and modify the recovered job again.

4. Click **OK** to close the message.

5. In the **Save As** dialog box, browse to the location where you want to save the first KISS file for recovering the job.

6. If necessary, modify the file name.

7. Click **Save**.

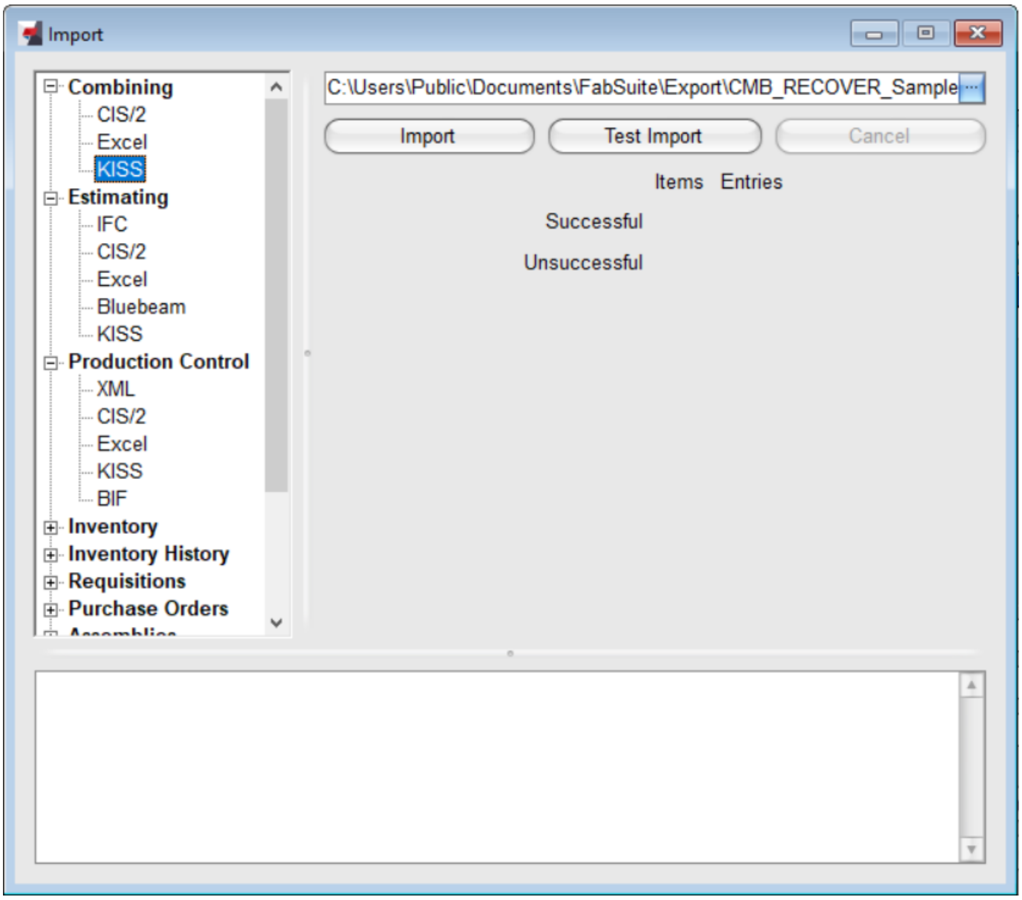
   Repeat steps 5 to 7 to select the saving location of all KISS files.

8. Close all open dialog boxes in the Tekla EPM.

9. To re-import the recovered job to Tekla EPM, click the **File** ribbon tab.

10. In the **File** menu, select **Import**.

11. In the navigation tree on the left of the **Import** dialog box, select the job type (**Combining**, **Estimating**, or **Production Control**) and then, select KISS.



12. Click the **...** button.
13. In the **Open** dialog box, browse to find the KISS file that you want to import.
14. Select the file and click **Open**.
15. Click **Import**.
16. In the job editing dialog box, modify the job information according to your needs.
17. Click **Save**.
18. In the **Import** dialog box, view the status of the import process.

    If necessary, you can view the import details and errors in a text file by clicking the **Open Import Log** button.
19. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

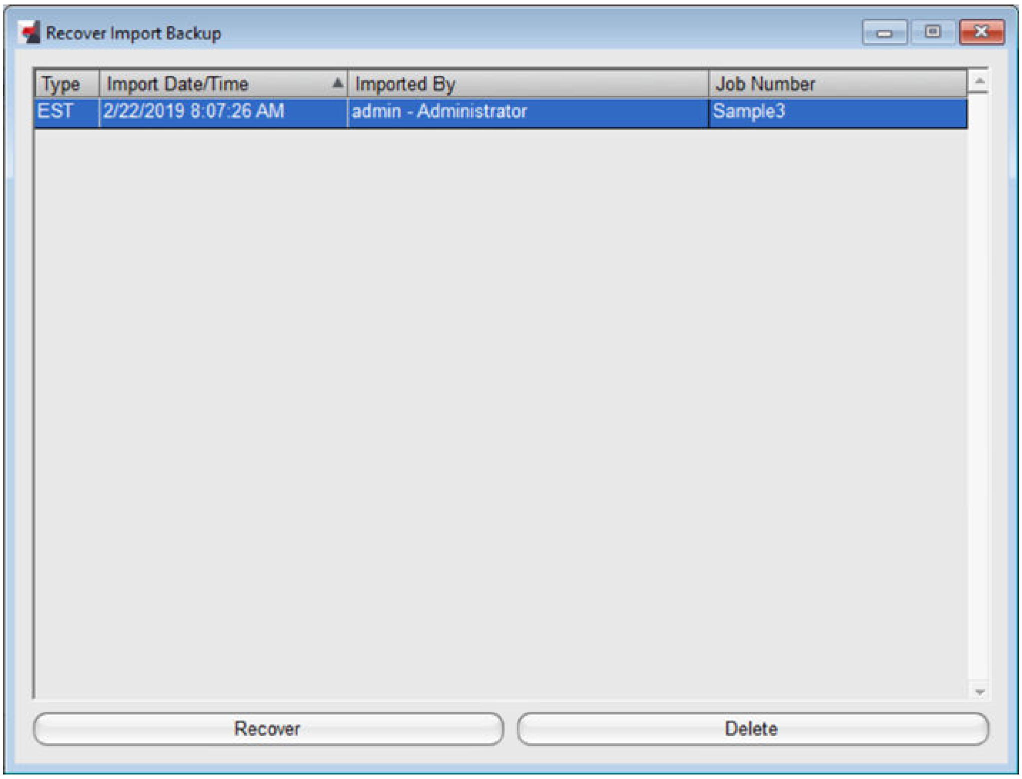
The recovered job can now be opened and modified when you open the related module in Tekla EPM.

Recover import backups

Tekla EPM creates import backup files automatically when information is imported to a production control job. Import backup files contain the information of a production control job before any new information was imported. By recovering import backup files, you can revert a production control job to the state before new information was imported.

1. In the menu, select **Recover Import Backups**.
2. In the **Recover Import Backup** dialog box, select the import backup file.

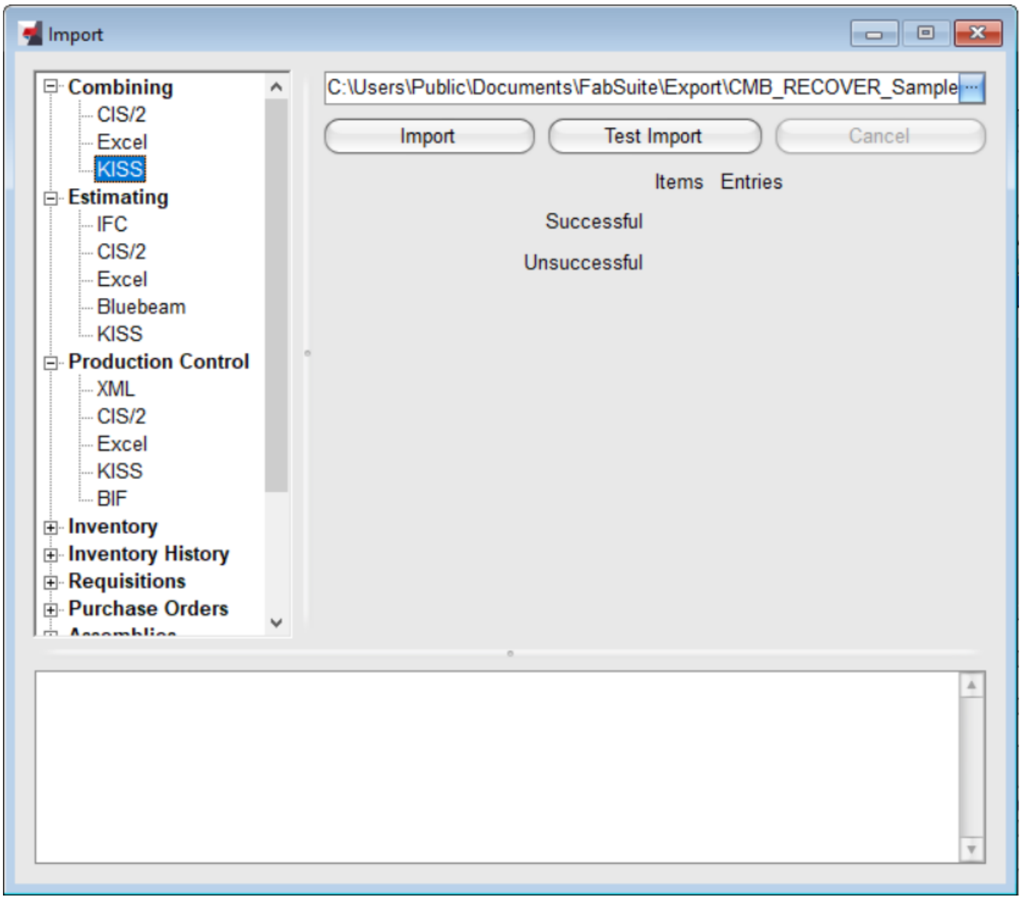
   You can identify the correct backup file by the import date and time, the user that imported the information, and the job number.



3. Click **Recover**.

   A message opens, informing you that Tekla EPM will create KISS files for the selected import backups. You can then import the KISS files back to Tekla EPM to revert the production control job to the state before importing information.
4. Click **OK** to close the message.
5. In the **Save As** dialog box, browse to the location where you want to save the KISS file.
6. If necessary, modify the file name.
7. Click **Save**.

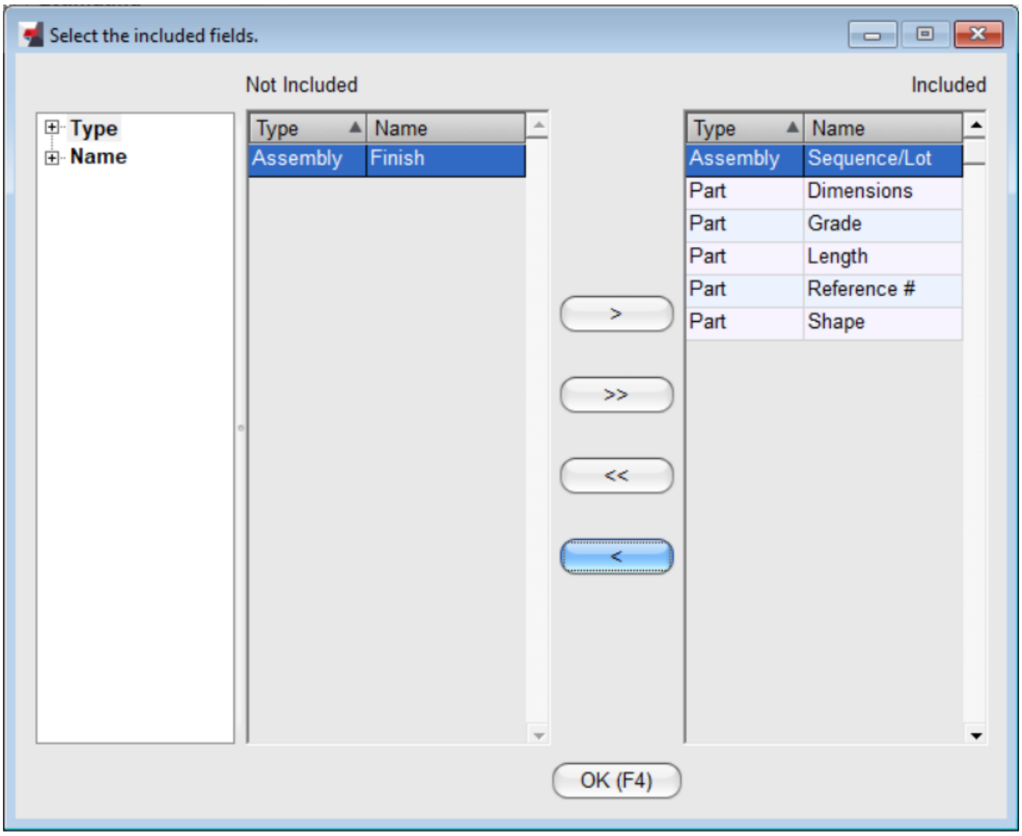
8. Close all open dialog boxes in Tekla EPM.
9. To revert the job to the state before new information was imported, Tekla EPM, click the **File** ribbon tab.
10. In the navigation tree on the left of the **Import** dialog box, select the import file type and then, select **KISS** .



11. Click the **...** button.
12. In the **Open** dialog box, browse to find the KISS file that you want to import.
13. Select the file and click **Open**.
14. Click **Import**.
15. In the **Job #** list, select the job that you want to revert to its previous state.
16. Click **Save**.
17. To overwrite the current information with the import backup file, in the **Import** dialog box, select **Add & Replace**.
18. Click **OK**.

    If you have selected the **Prompt to confirm import fields** in the **Company Standards** dialog box for the **Production Control** module, the **Select the included fields** dialog box opens.

19. In the **Select the included fields** dialog box, click the arrow buttons to move the fields whose information that you want to replace to the **Included** list.



20. Click **OK**.
21. Define other necessary information for the imported backup file.
22. Click **OK**.
23. In the **Import** dialog box, view the status of the import process.

    If necessary, you can view the import details and errors in a text file by clicking the **Open Import Log** button.
24. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

1.9 Repair program errors

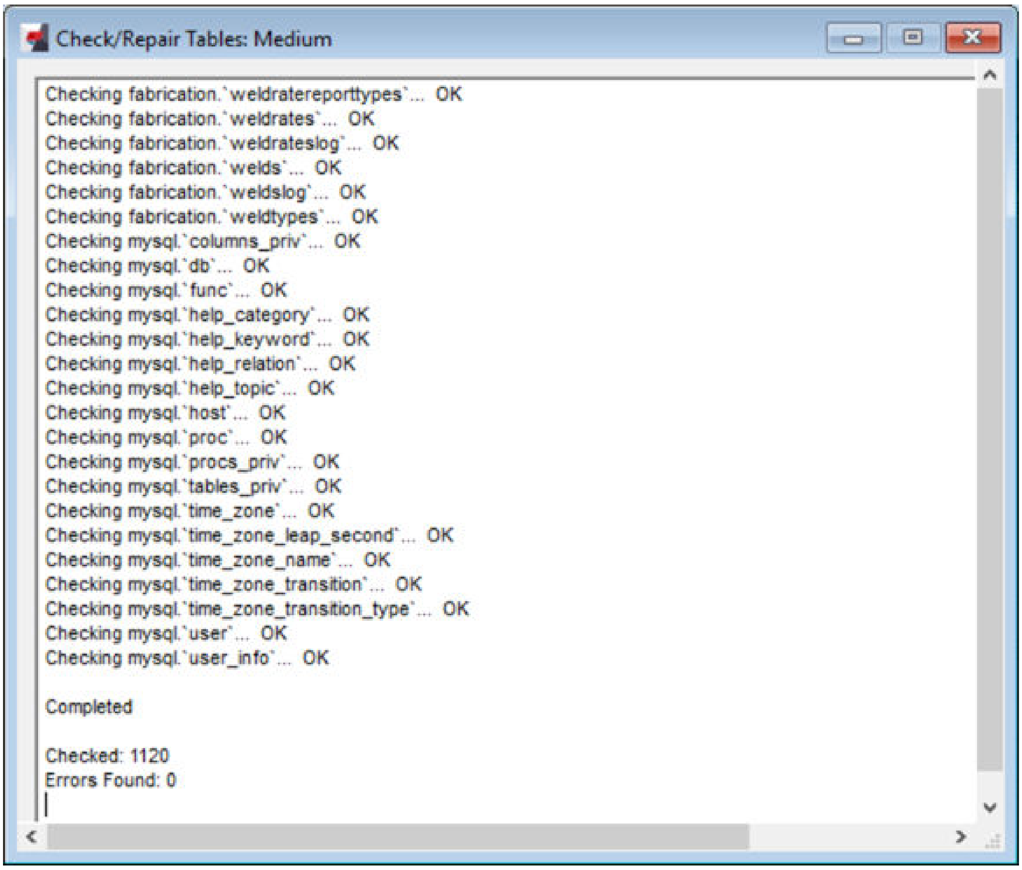
Administrators can use the **Check/Repair Tables** commands on the server computer to find and repair errors in Tekla EPM. When one of these commands is executed, the program information is checked against the MYSQL database and any corrupt files are repaired.

NOTE To repair errors, the administrator must execute the **Check/Repair Tables** commands on the server computer. On other workstations, the **Check/Repair Tables** commands can help you find corrupted files, but the files cannot be prepared.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Administration**.
3. Click the **Administration** ribbon tab.
4. In the menu, select one of the following commands:
   - **Check/Repair Tables: Quick (Fast)**
   - **Check/Repair Tables: Medium (Recommended)**
   - **Check/Repair Tables: Extended (Slow)**

   The **Check/Repair Tables** dialog box opens, and the check and repair process starts.

   The more information is saved into Tekla EPM, the longer the check and repair process takes.
5. In the **Check/Repair Tables** dialog box, review the result of the check and repair process.



6. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Index

W