



USER MANUAL

BEIM NAVISWORKS TOOLS

Clash organization, reporting, Revit sync, scheduling, and issue coordination

A concise guide to the current BEIM Navisworks ribbon tools for Navisworks 2022 through 2027.

Version 1.05

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Getting Started

The BEIM Navisworks tools are located on the BEIM Tools ribbon tab. Sign in to Navisworks, open a model, and activate the plugin before running the workflow tools.

Ribbon Button	Use It To
Activate	Activate or validate the plugin license.
Clash Manager	Open the main clash automation Home Menu.
Coordination Hub	Open the issue, marker, snapshot, and meeting manager.
Export Visible	Export an NWD containing the current visible section of the model. This ribbon command is present in the reviewed 2026 and 2027 Navisworks builds.
Room Views	Create room-based Saved Viewpoints from room and door classifications.

Shared Clash Selection Panel

Most Clash Manager actions use the same selected tests and statuses. Set these first, then work through the tabs on the right side of the Home Menu.

Control	Use
Refresh Tests List	Reload tests and statuses from Clash Detective.
Search And Select	Select tests whose names contain the search text.
Tests Check All / Check None	Select or clear all tests.
Status Check All / Check None	Select or clear all statuses.
Tests and Status lists	Choose exactly which clashes the current tab will process.

PROCESSING SCOPE

Only checked tests and statuses are processed. Refresh always lists New, Active, Reviewed, Approved, and Resolved, and preselects tests with ungrouped results plus the statuses found in those results. Items outside the selected scope remain unchanged.

Home Menu Tab: Group

Use Group to organize selected clash results into clash groups. The tool can group by distance alone or split grouping by status, assignee, and level.

Option	Use
Group Size	Move toward Less Groups for larger groups, or More Groups for smaller groups.
Re-Group Selected Test Clashes	Include already-grouped clashes in a new grouping pass.
Ignore Assigned	Skip clashes that already have an assignee.
Ignore Unassigned	Skip clashes that do not have an assignee.
By Status / Assigned To / Level	Create separate grouping buckets by the selected properties.
Min / Max Group Distance	Control how close groups can merge and how far members can spread.

1. Select the tests and statuses to process.
2. Choose any grouping filters such as By Level or By Assigned To.
3. Adjust the Group Size slider.
4. Click Group Clashes.
5. Review the Clash Detective tree before moving to Rename or Assign.

Home Menu Tab: Rename

Use Rename to apply consistent names to clash groups and clash results. Names are built from up to five prefix fields.

Prefix	Meaning
Test Name	Adds the owning clash test name.
Level	Adds the level detected at the clash location.
Grids	Adds grid information detected at the clash location.
Date	Adds the clash date when available.
Zone	Adds the saved zone that contains the clash location.
Name	Adds a unique Group or Clash number. This is required.

REQUIRED

At least one prefix field must be set to Name. Selected parts are joined with *. If Zone is used and the clash is outside every saved zone, the name uses NoZone. A saved name beginning with Zone is shortened. Date falls back to Date Varies; missing level or grid values use N/A.

1. Select the tests and statuses to rename.
2. Choose the prefix fields in the order you want the name to read.
3. Make sure one prefix is set to Name.
4. Click Rename Clashes and Groups.

Setting Zones From the Rename Tab

Zones let you include project areas in clash names. Create zones before using the Zone prefix in the Rename tab.

1. Open Clash Manager and go to the Rename tab.
2. Click Manage Zones.
3. Click Update to refresh level information from the active grid system.
4. Enter a Zone Name.
5. Choose Zone Bottom and Zone Top. Use Unlimited Below or Unlimited Above when the zone should not stop at a level.
6. Click Add Zone.
7. In the model view, left-click elements to place polygon points around the area.
8. Place at least three points, then right-click to close the polygon.
9. Click Accept and Save.
10. Return to the Rename tab, set one prefix to Zone and one prefix to Name, then rename the selected clashes.

Zone Button	Use
Update	Refresh levels and the saved zone list.
Add Zone	Start drawing a new zone polygon.
Accept and Save	Save the closed polygon as a zone.
Clear and Retry	Clear the current drawing points and redraw.
Continue Drawing	Back up one point and continue the polygon.
Cancel Drawing and Return	Cancel the current zone drawing.
View Zone	Show selected zone overlays in the model view.
Clear Zone	Remove the zone overlay from the view.
Apply Changes	Update the selected zone name or vertical limits without redrawing the polygon.
Delete Zone	Delete selected zones after confirmation.

ZONE SHAPE

Place at least three points and do not cross the polygon over itself.

Home Menu Tab: Assign

Use Assign to set assignees and statuses in bulk. Direct assignment fills blank assignments unless Re-Assign is selected. Saved rules can target TestName, ClashName, or GroupName.

Area	Use
Assign All Selected Clashes	Enter one assignee and apply it to selected clashes.
Re-Assign	Overwrite existing assignees instead of filling only blank assignments.
Assign by Rules	Set Assigned To from saved TestName, ClashName, or GroupName rules.
Status by Rules	Set status from saved TestName, ClashName, or GroupName rules.
Status by Group/Clash Name	Apply the dedicated top-level group/clash-name status rules.

RULE ORDER

Rule text uses a case-insensitive contains match. Save rules before applying them because Apply reloads the saved rule set. Rules run top to bottom; use Stop after first matching rule when the first match should win, otherwise the last matching rule wins. Re-Assign also applies to rule-based assignment.

Home Menu Tab: Viewpoints

Use Viewpoints to create Saved Viewpoints for selected clashes. Clash Views are built from clash item geometry. Report Views use Clash Detective report-style issue views and redlines.

Option	Use
Transparency	Fade non-clash model elements while keeping clash items visible.
Distance	Set the camera distance. Use 0 to auto-fit the clash.
View Direction	Choose Top, Bottom, Left, Right, Front, or Back.
Orthographic	Create a straight-on orthographic viewpoint.

Option	Use
Use current views planes	Copy enabled clipping planes from the current view into each generated viewpoint.
Manual Cut Planes	Apply selected directional offsets when current view planes are not used.
Color / Circle / Square / Outline Clashes	Highlight clash items with colors, simple redline shapes, or item-based redline outlines.
Model Name Tags	Add model-name labels with arrows pointing to the clash items in the generated viewpoint.
Tag Characters	Limit how many starting characters are shown in each model-name label. The value can be set from 1 to 64; the default is 8.
Add to Dated Folder	Organize outputs under a dated Saved Viewpoints folder.
Ignore Assigned / Unassigned	Skip clashes based on whether they already have an assignee.
Sort By	Organize viewpoint folders by Test Name and/or Assigned To.

VISUAL TAGS

Use Outline when circles or squares hide too much detail. Use Model Name Tags when the reviewer needs to identify the linked model on each side of the clash. Color Clashes cannot be combined with the circle, square, outline, or model-name tag choices.

1. Open Clash Detective so clash issue views are available.
2. Select the tests and statuses to process.
3. Choose viewpoint settings, visual tag options, and folder sorting.
4. Click Clash Views for geometry-based viewpoints, or Report Views for report-style viewpoints.
5. Review the Saved Viewpoints tree after the tool finishes.

Home Menu Tab: Report Data

Use Report Data to store project information, manage the report database, and generate PDF reports from historical clash data.

Control	Use
Project Details	Enter Company Name, Model Name, Project Name, and Project Area for report headers.
Set Report PDF Path	Choose where generated PDFs are saved.

Control	Use
Save Details	Save the project details into the model.
Delete Details	Clear saved project details.
Manage Report Database	Open the editable clash report table.
Manage Report PDF	Preview and generate report PDFs.

Manage Report Database

- Add New Clashes adds the current Navisworks clash selection to the report table.
- Save Changes writes the table to the model database.
- Delete Selected and Delete All remain pending until Save Changes; Reset discards unsaved edits.
- Use Delete Duplicates to remove matching complete rows.
- Search/Select helps find rows in a large report table.
- Save CSV and Load CSV move report data between files and models.
- Closing with unsaved changes prompts before the window closes.

Manage Report PDF

Report Type	Chart Styles
Clash Trend	Line or Column
Status Breakdown	Doughnut or Pie
Assignment Load	Stacked Bar or Grouped Bar
Test Performance	Current vs Previous or Current Count

REPORT OUTPUT

Split by None, Assigned To, Test Name, or Status. Use Previous and Next to review groups, Current PDF for the visible group, or All PDFs for every group. Add Logo selects the logo shared by clash reports and meeting minutes.

Home Menu Tab: Sync R

Sync R exports the checked tests and statuses for Revit Sync N. Prepare the active grid display when automatic alignment is available. The Navisworks Selection Tree does not control this export.

1. Open the Navisworks View tab and turn on Show Grid.
2. In the first Grids & Levels dropdown, choose the matching Revit model/grid system.
3. Check the tests and statuses to send to Revit.

4. Open the Sync R tab.
5. Click Sync Selected.
6. Open Revit and run BEIM Tools -> Sync N Clashes.
7. Click Reload Export in Revit.

MANUAL FALLBACK

Revit compares exported levels and grids with the active model and loaded Revit links; model filenames do not need to match. If no usable match is available, the export remains valid and Revit uses Manual fallback so you can verify units and Internal or Shared coordinates before previewing.

LAST EXPORT

Each Sync Selected run replaces the shared export read by Revit. The last successful export remains between sessions, but a failed or empty run does not preserve it. Export again after changing the clash scope or after a plugin rebuild or reinstall.

Home Menu Tab: Schedule

Schedule saves repeatable Clash Detective and BEIM workflows. For timed runs, Navisworks, the target model, and Clash Manager must remain open. Use Run Selected to test the full workflow before enabling it.

Control	Use
Add Schedule	Create a new schedule entry.
Enabled	Turn the selected schedule on or off.
Save Selected	Save the selected schedule settings.
Run Selected	Run the schedule immediately for testing.
Time and day selections	Choose when the schedule should run.
Clash Detective Operations	Choose up to three ordered Reset, Update, or Compact operations. Each slot can use checked tests or all tests.
BEIM Operations	Add as many as 12 ordered operations. Duplicate operations are allowed.
Final NWD Export	Publish an NWD after the other operations, using the options available for the installed Navisworks year.

BEIM Operations

- Group Clashes
- Rename Clashes and Groups
- Assign Clashes
- Assign Clashes by Rules
- Set Status by Rules
- Report Views
- Clash Views
- Add and Save Report Data
- Save Navisworks Model
- Close Navisworks Model

SAVE AND CLOSE ORDER

Save Model must be the last BEIM operation or immediately before Close Model. Close Model must be last.

Final NWD Export

Turn on Export NWD after operations and choose an output file different from the active model. Options include Embed referenced files, Exclude hidden items, and Include object properties. In Navisworks 2022-2025, the Exclude hidden items checkbox may appear without a label. Those years publish the 2016-2025 format; Navisworks 2026 adds 2026, and Navisworks 2027 adds 2027 while retaining the older formats.

BEFORE SCHEDULED SAVE

The active model must have been saved manually at least once before Save Model can work. Re-save the schedule if a stored clash test is renamed.

Run Order

1. Refresh model files, if enabled.
2. Apply the saved tests, statuses, and tab settings.
3. Run the three Clash Detective slots.
4. Run the BEIM operations in order.
5. Export the final NWD, if enabled.
6. Save and close the model if those terminal operations were selected.

SCHEDULE STATUS

The Status area records starts, completions, warnings, and queued runs. A failed step is logged and the schedule continues. A due schedule waits while another runs. Timed checks start when Clash Manager opens and stop when it closes; reopening can catch up a missed run from the prior 24 hours. Two enabled schedules cannot use the same day and time.

Home Menu Tab: Settings

Button	Use
Save Settings To Model	Store current Home Menu settings, schedules, and rules in the open model.
Save Settings To File	Export settings, schedules, and rules for backup or reuse.
Load Settings From File	Import settings from a saved file and reload assignment/status rules.

Coordination Hub

Coordination Hub manages project issues separately from Clash Manager. Use it to track issue status, assign responsibility, capture snapshots, place model markers, create saved viewpoints, and prepare meeting minutes.

Issue Tool	Use
New Issue	Create a new open issue with a default due date.
Delete Issue	Delete selected issues, including their snapshots, markers, and meeting links.
Delete All Data	Delete all issues, snapshots, markers, and issue links from meetings. Meeting records remain.
Reset ID Counters	Set the next ID to one greater than the highest existing ID. Gaps are not filled.
Reassign	Change Assigned To for one or more selected issues and record newest-first history.
Microphone	Click once to record and again to stop; transcription is appended to Description.
Capture Snapshot	Store the current image, camera, and available redlines.
Export / Import CSV	Move issues, assignment history, snapshots, cameras, redlines, markers, meeting details, and meeting-to-issue links using one CSV file.
Create Saved Viewpoints	Create Saved Viewpoints from selected issues' stored snapshots.
Add Marker	Click the model to place a marker for the selected issue.

Issue Tool	Use
Delete Marker	Remove marker locations for the selected issue.
Export Issue Geometry	Export selected or all markers as DXF sphere geometry. Append the DXF using matching model units.

DELETE ALL DATA

This action affects the entire issue database, not only selected rows. Confirm that all issue data should be removed before continuing.

MARKER COLOR TIP

In the issue table, right-click a cell and choose Color Markers by Matching Text to apply the same marker color to every issue whose cell text matches that value.

The issue filter searches the main issue fields. Multi-select issues to update status, Level/Area, dates, assignment, or meeting links together. Issue changes save to the model as they are made; Reassign also records assignment history.

Issue Marker Display

- Show Markers toggles issue-marker overlays.
- Filter Selected Issue Markers limits markers to selected issues.
- Filter Open Issue Markers hides markers for closed issues.
- Auto-create snapshot when placing marker captures a snapshot during placement.
- Open markers are gold and closed markers are green unless a group-color rule overrides them.
- Delete Marker removes all marker locations for the selected issue.

Working With Issues

1. Open BEIM Tools -> Coordination Hub.
2. Create or select an issue in the Issues tab.
3. Edit Level/Area, Status, dates, Assigned To, and Description as needed.
4. Capture snapshots from the current Navisworks view. Snapshots store camera data, thumbnails, full images, and redlines where available.
5. Add one or more model markers if the issue should be visible in the model.
6. Attach the issue to a meeting when it needs to appear in meeting minutes.

CSV IMPORT

One CSV carries issues, assignment history, snapshots, cameras, redlines, marker locations, meeting details, and meeting-to-issue links. When an imported issue ID already exists, choose whether to overwrite it, skip it, or cancel the import. CSV files created by earlier plugin builds still import, but they contain only the information those versions exported.

SNAPSHOTS

A snapshot stores the camera, available redlines, thumbnail, and full image. Selecting it restores the saved view and redlines; double-click opens the full image. Create Saved Viewpoints skips selected issues without snapshots.

Meetings

- Create meetings from the Meetings tab.
- Fill in project name, title, date, header, description, and agenda.
- Attach issues from the Issues tab using the meeting picker.
- Use Add Logo if needed. The logo is shared with Clash Manager PDF reports.
- Save meeting edits, then export minutes as PDF or HTML. Removing a linked issue from a meeting does not delete the issue. Meeting details and issue links are included in the combined CSV; generated minutes files remain separate.

Export Visible

Export Visible is available in Navisworks 2026 and 2027. It creates an NWD from the current visible or sectioned portion of the model. Items outside enabled clipping planes and items already hidden are excluded. Items hidden temporarily for export are restored afterward; anything already hidden stays hidden.

1. Open the model in Navisworks.
2. Set up the section box or clipping planes you want to export.
3. Click BEIM Tools -> Export Visible.
4. Choose the NWD file name and location.
5. Open the exported NWD and verify the visible area before sharing.

Room Views

Room Views creates Saved Viewpoints for rooms. It looks for model items classified as Rooms and Doors, then builds the selected viewpoint directions under a Rooms folder.

Viewpoint	Description
Door - Into Room	Camera is placed near the nearest door and aimed into the room.
Top - Down	Camera is placed near the room top and looks down.
Bottom - Up	Camera is placed near the room bottom and looks up.
Front / Back / Left / Right	Camera is placed inside the room and aimed in the selected direction.

CLASSIFICATION CHECK

Choose Door, Top, Bottom, Front, Back, Left, and/or Right. Door is selected by default; if all choices are cleared, Top and Door are created. Existing names are skipped. If Door is selected and no valid Doors are found, the command stops. Confirm Item -> Type values of Rooms and Doors. Current camera offsets are intended for feet-based model units.

Troubleshooting

Issue	Recommended Check
A tool asks you to sign in.	Sign in to Navisworks, then run the command again.
A tool says no model is open.	Open or append a model before using the BEIM command.
Rename shows NoZone.	Create or update zones from the Rename tab and confirm the clash point falls inside a saved zone and its vertical limits.
Viewpoints are missing.	Confirm Clash Detective is open and selected tests/statuses contain results.
Reports are blank.	Add clashes to the report database and save project details before previewing PDFs.
Revit uses Manual fallback.	Re-export with Show Grid and the matching Revit grid system, or verify units and coordinates in Revit.
A timed schedule does not run.	Keep Navisworks, the target model, and Clash Manager open; confirm Enabled, day, and time.
Room Views finds no rooms or doors.	Check model classification properties for Item -> Type values.
Older clash names show missing data.	Reset and rerun the clash test in the current Navisworks version, then rename again.

Version Support

- Navisworks 2022-2025: Activate, Clash Manager, Coordination Hub, and Room Views.
- Navisworks 2026-2027: the same tools plus Export Visible.
- Clash Manager, Sync R, reporting, scheduling, and Coordination Hub workflows are shared across the active builds. Newer NWD publishing formats appear only in the Navisworks years that support them.