

3 Quick Tips to Get Started with UNIFI

Thanks for giving UNIFI a try. To help you start more efficiently organizing, accessing and managing your BIM content, we've put together a quick start guide to help you get you, well, get started!

1. Upload content
2. Add users
3. Search & insert content

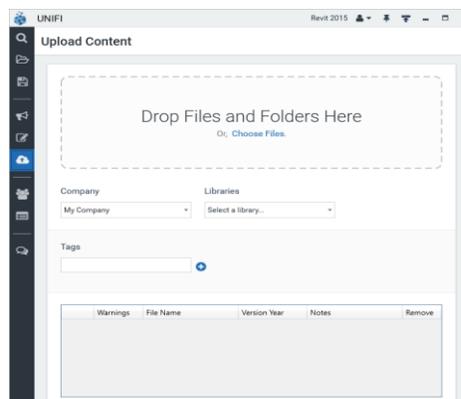
1. UPLOAD CONTENT

UNIFI comes with two empty libraries already set up and just waiting for you to upload your content. Feel free to upload your existing content to these premade libraries or create your own on the LIBRARY MANAGEMENT screen.

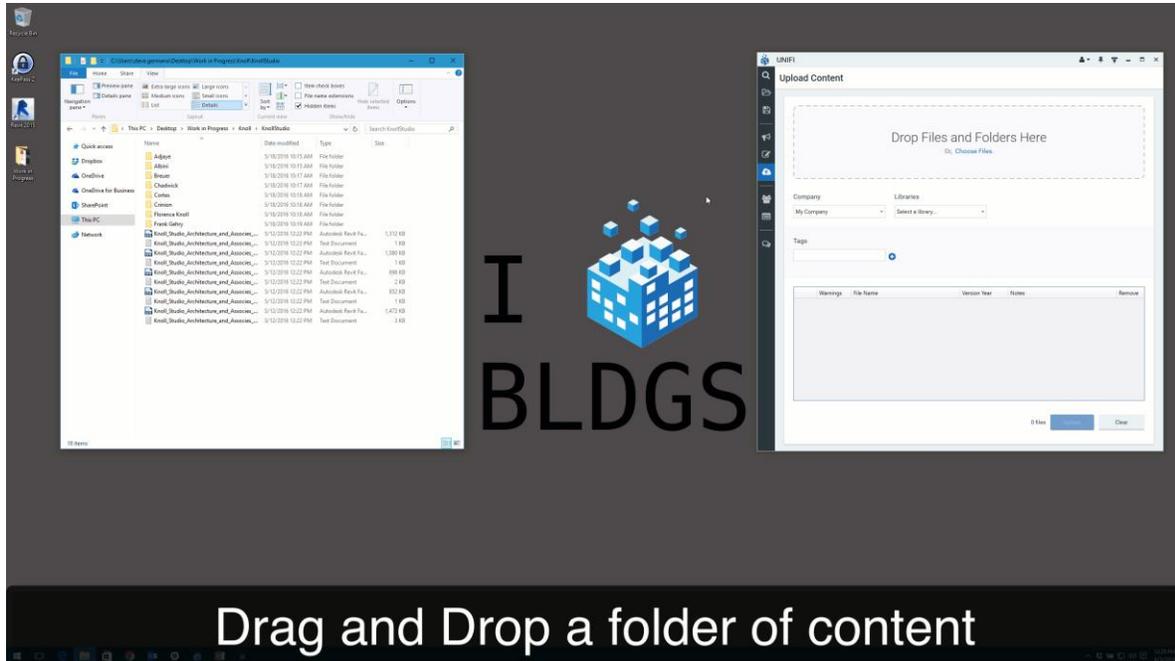
- Company Library – Your main content library
- Detail Library - This library can be used to store all of your company details (drafting views)

Below, we show you how to navigate to the Upload screen and then drag & drop a folder of content/.rfas directly into UNIFI:

1. Navigate to the UPLOAD screen within UNIFI



2. Drag and Drop a folder of content / .RFA's directly into UNIFI



Looking to upload your system families and details as well? No problem! UNIFI is compatible with multiple Revit element types:

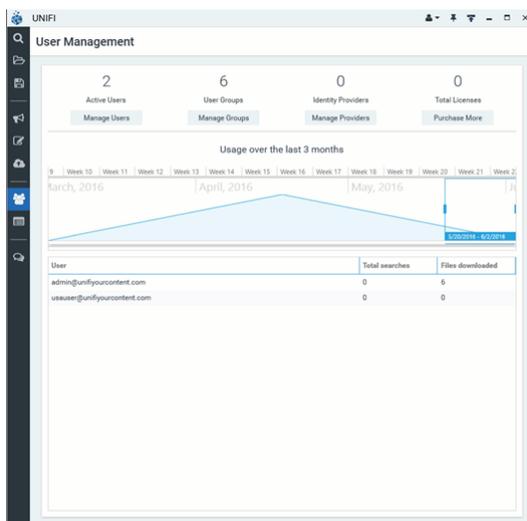
- Families (.rfa)
- System Families (Walls, Floors, Ductwork, Piping, Cable Tray etc)
- Details (Drafting Views)

2. ADD USERS

UNIFI has three user "Roles" for various security and workflow purposes. **Company Administrator, Library Administrator, and User.** At the end of this document, we have a detailed list of roles and responsibilities.

Role	Suggested Users
User	Used for majority of design staff to supply access to specific libraries of content
Library Administrator	Ideal for regional BIM managers or office BIM managers who are responsible for managing content within specific libraries, but do not need full firm wide library access rights
Company Administrator	We recommend that a small group of users are in this role

Here's how to add users:

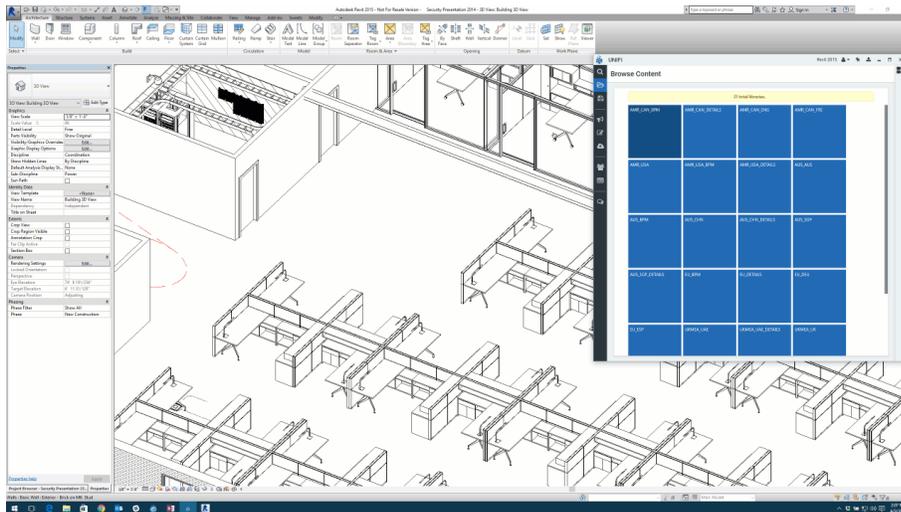


- Navigate to the USER MANAGEMENT screen within UNIFI by clicking on the People icon on the left-hand tool bar.
- Then click the Manage Users button under the Active Users section
- Insert the user's first name, last name, email address and password, and hit save user
- The user has now been successfully created and will receive an email inviting them to reset their password

3. SEARCH & INSERT CONTENT

Now that your content has been uploaded and your users are all set up, it's time to start designing with your team! You can search for content, browse content within libraries, and insert directly into your Revit design.

Navigate to the SEARCH screen within UNIFI to quickly find content and insert into Revit.



We also have a video that shows how much more quickly UNIFI is than traditional methods. Here's a link to a [video](#).

DID YOU KNOW?

- When you drag and drop a folder structure of Revit content into UNIFI, the names of the folders will automatically be added as tags to the content. This quickly and effortlessly allows you to batch upload thousands of pieces of content and make them instantly
- When you drag in a Revit family (.rfa) UNIFI will automatically look for an associated Type Catalog file. No need to worry about forgetting to upload the Type Catalog!

Now, you are well on your way to becoming a UNIFI power user!

APPENDIX

Detailed Description of Role Responsibilities and Rights

Role	Security Rights	Notifications	Suggested Use
User	<ul style="list-style-type: none"> • Full library access • Limited Library Access • Full user management access • Full read access to all content • Full write access to all content • Limited read access - Only to the libraries assigned access to • Limited write access - Can upload to libraries assigned access to, but content is placed in queue for review by Admin • Can grant library access to users and groups 	Will only receive notifications for content they uploaded or content requests that they have made.	Used for majority of design staff to supply access to certain libraries of content.
Library Admin	<ul style="list-style-type: none"> • Same rights as “User” 	Will receive upload notifications and content request alerts for ONLY the libraries assigned as Administrator	Library Admins are perfect for regional BIM managers or office BIM managers who are responsible for managing content within specific libraries, but do not need full firm wide library access rights
Company Admin	<ul style="list-style-type: none"> • Full library access • Full user management access • Full read access to all content • Full write access to all content • Can grant library access to users and groups 	Will receive all upload notifications and content request alerts for all libraries	It is recommended that only a very small group of users are made Company Admins to mitigate risk.