

# Quick Start Guide for Admins

Last Modified on 06/10/2021 4:19 pm EDT

Welcome to UNIFI! We've put together this guide to help you get started with organizing, accessing, and managing your BIM content more efficiently.

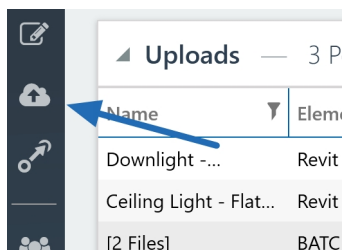
## Upload Content

UNIFI comes with two empty libraries that are ready for uploading content:

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

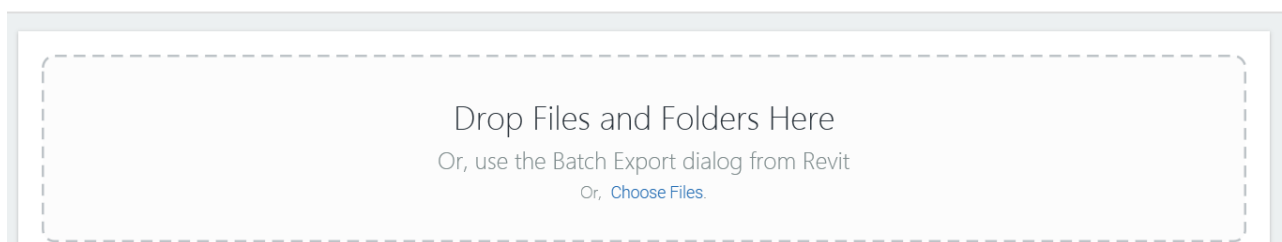
Feel free to upload your existing content to these pre-made libraries or you can [create your own](#) library structure.

To upload content, select the cloud icon on the left side of the screen.



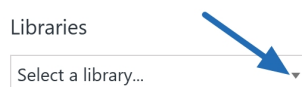
Next, navigate to the folder directory on your computer where all of your content is currently located, and then drag and drop the files that you'd like to upload.

### Upload Content

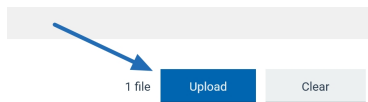


When you drag and drop a folder structure of Revit content into UNIFI, the names of the folders will automatically be added as [tags](#) to the content. This allows you to quickly batch upload thousands of pieces of content that will be easily found using UNIFI's robust search feature.

Next, **select the library** you want it to go to.



And then select **Upload** in the bottom right of the screen



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

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

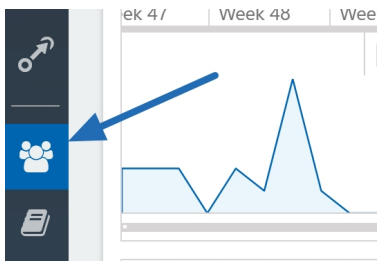
For more information on uploading content, including instructions on using our Batch Export feature, check out our guide to [Adding Content to UNIFI](#).

## Add Users

UNIFI has three user roles for various security and workflow purposes:

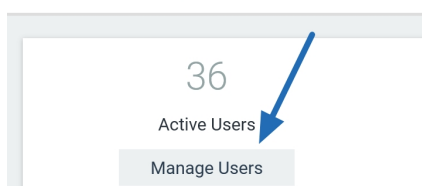
- **Standard User:** Used for the majority of design staff to supply access to specific libraries of content.
- **Library Administrator:** Ideal for regional BIM managers or office BIM managers who are responsible for managing content within specific libraries, but do not need full firm-wide library access rights.
- **Company Administrator:** We recommend that a small group of users are in this role as they have control over all UNIFI functionality.

To add a user, navigate to the User Management screen within UNIFI by clicking on the **People icon** on the left side of the screen.

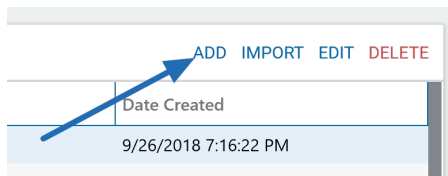


Next, click the **Manage Users** button under the Active Users section.

### User Management



Select **Add** in the upper right corner of the screen.



Insert the user's first name, last name, and email address.

First Name:  Last Name:

Email:

☐ Company Administrator

☒ Send Activation Email?

Sending the activation email will set a random password for the user. To define your own password, uncheck this option and enter the desired password below.

Identity Provider:

UNIFI

#### Groups

☐ Admins

☐ Admins - Content Request Notifications

☐ Administrators - All

Then select **Save User**.

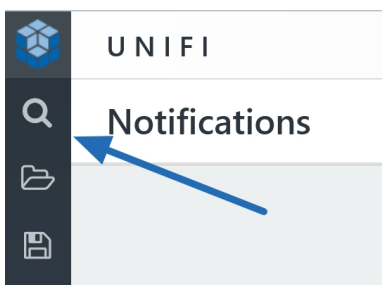
The user has now been successfully created and will receive an email inviting them to reset their password.

Check out our [guide on How to Manage Users](#) to learn more about editing users, managing groups, and more.

## 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](#) or [browse content within libraries](#) and then insert it directly into your Revit design.

To do this, click on the magnifying glass in the top left corner of the screen.



Type in the search bar what you'd like to find.

Search UNIFI...

Q Search in:

Select a Library...

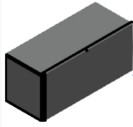
Search Fields (5/7)

Filter by:

Filters

And then simply click on the thumbnail image to load that family into your current Revit project.

★  
★  
★  
★  
★



**Air Handling Unit - Split System - Horizontal**

IMPERIAL

Category: Mechanical Equipment   Size: 532 KB   Revision: 4   Inserts: 6

Libraries:

MEP-Mechanical

Retail

Tags:

Air Handling Units

Div\_23 7000 - Central HVAC Equipment

DIVISION 23

Mechanical

To learn more, check out some more of our Knowledge Base articles on [Finding Content](#) in UNIFI.

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