Library Management Best Practices

In this article, we are going to share some best practices for library management in UNIFI.

Overview of Libraries

Libraries are essentially like folders; they are buckets where you can store any content. Once a certain library is set up, you can then grant access to either individual users or a group of users. Any user with rights to a specific library will be able to browse and search through that library's content, as well as place any of the content into their Revit projects.

No one without access to a library will be able to locate or access the content stored there. Libraries can also have their own admins, called "Library Admins" who have the ability to approve or reject content uploaded to that library. They can also fulfill content requests that are submitted to that library.

How many libraries should I have?

You can create an unlimited number of libraries in UNIFI, but we find that our most successful customers strive for simplicity: less is almost always more. Maintaining a streamlined library strategy will not only make it easier for your users to learn and use UNIFI but also make your life as a BIM manager much simpler, as it will shorten training time for new users.

What library strategy should I use for my organization?

Generally, we see that companies have an overall theme to their libraries – even though most still have some combination of the strategies listed below. For example, one company has the majority of their libraries organized and set up by project, while another organizes their library by office location. It is critical to consider what unique business objectives you are looking to accomplish by uploading your content to UNIFI.

Depending on your firm's requirements, you have unique problems to solve around content consistency and standards. A domestic firm will most likely only have to worry about content in Imperial units (or metric, if outside the US), whereas an international firm will have content in both formats, and therefore their library strategy will have to accommodate these 2 types of content.

For some clients, security permissions and project-level access are paramount. For others, enabling quick search is the primary objective. Each of those goals is best accomplished by a different library organizational structure, and we encourage you to work closely with a UNIFI BIM Specialist to evaluate what theme will work best for your firm.

Regardless of what structure your team decides to use, we recommend the use of sandbox libraries (these are like crowdsourced repositories where everyone can dump content to be immediately searchable but also allow it to be validated). Here are some of the most common ways other customers have set up their libraries:

- **Generic libraries** – Usually a library for each Autodesk Revit Default content pack. Ex: Autodesk US Metric
- **Global libraries** – Everything that is approved and vetted for the whole organization (with the exception of highly sensitive content) Access to this is sometimes limited to a few administrators or opened up firm-wide. A global library provides a single list of everything and is, therefore, easier to administer than several libraries that have some amount of crossover between each.
- **Sandbox libraries** – All users can have admin access to this, which allows you to accept contributions from

anybody. These contributions can be inserted, rated, and tagged by everybody else. This allows a sort of crowd-sourced and efficient way to test the acceptance of content before graduating it to other, more restricted libraries.

Libraries Vs Tags

An easy-to-access company library is only part of the power of UNIFI. Tags can be added to any uploaded file – whether it's a Revit family, a component, or a non-Revit file such as a PDF or DWG file.

All the Revit families from a project, for example, can get tagged with the project name and added to your standards library. That way, if you're looking for a family from a specific project, you can search by family type and project name. We also have clients tag content by spec number or company division. The choice is yours.

Uploaded files can have any number of tags. Tags can be admin or user-defined, giving you a lot of flexibility in their application.

Key Recommendations

No matter what your firm's unique requirements are, here is a list of the top recommendations every firm should keep in mind when designing the library strategy that will work best for your team:

- **Imperial vs. Metric** – Keeping your Imperial and Metric content in separate libraries will reduce the amount of potentially redundant content that your users will have to weed through
- **Saved Searches** (see "How to" section below for instructions on setting saved searches up) – Saved searches are a powerful way to provide quick and easy access to particular sets of content for your design teams. This feature is just as critical as selecting your library strategy to your users' success with UNIFI. Many of our customers choose to have a minimal number of libraries because they are able to use Saved Searches so effectively.
- **Discipline libraries** – These are often defined to include or exclude imperial/metric: Ex: Arch Metric
- **Location/Regional libraries** – Also usually include whether imperial/metric
- **Project libraries** – Active Project libraries, since there will be many, can be named so they appear together in library lists among other libraries that are named by discipline or location. The advantage to organizing libraries by project is so that user access can be more straightforward as you can set up corresponding user groups per project. Later, these libraries can be reviewed to see if any content should be moved over the main library for future projects.
- **Separate Libraries for Details, Families, & Systems** – If your users have a tendency to browse for content, this approach can be considered. When searching or browsing for specific element types in UNIFI, try building separate libraries for quick and easy filtering. Having a library per element type will automatically reduce the amount of content results your users will browse or search through. The fewer the number of total results a user sees, the faster your designers will be able to locate exactly what they are searching for. It is a best practice to have all your details in a Detail Library, your system families is a System Library, etc. This library strategy is a more structured approach that will provide quick access to element types. As this can easily create too many libraries for your users to choose between, an alternate approach to this could be by utilizing Saved Searches.
- **Security Group libraries** – The other way to handle project access for security clearance projects is a bit more roundabout and depends on the security groups you have for project access. For example, you could set up a smaller set of libraries – one for each security group. Then you'd create groups of users that can access those libraries. This is helpful if the number of security groups is significantly less than the number of projects requiring security level access. Then, content can be stored in these libraries of security groups, tagged as relating to certain projects, and accessed either through Project-specific saved searches or through normal

browsing/searching.

Saved Searches can be set up either by Library or Company admins, and are instantly available to all users. If your users need to have a quick way to find all "2 hr rated shaft walls" or want to see all "water cooled screw chillers", saved searches will hide the complexity of advanced queries from the users as a single click provides access to the right content in seconds.