Best Practices for Using a Sandbox Library

Do you think you need to clean up your content first before moving forward with a content management platform? Do you already have a content management platform and have realized that perhaps it wasn't structured in the right way? You aren't alone.

Many of our users are in a constant state of quality control of the content within their libraries regardless of their BIM maturity level. This is because there will always be a need for new content. Both small and large firms need some sort of a vetting process to approve any new content before it is rolled out to their libraries. This quality control process is a critical component of maintaining solid BIM standards.

In this article, we'll guide you through one option for implementing a workflow for vetting content using UNIFI Pro. This method involves implementing what we like to call a "sandbox library."

What is a Sandbox Library?

You may be more accustomed to terms like "work in progress" or "do not use," but we like using the term "sandbox" because it has a literal meaning of a place that you play which is also contained.

This may be a new term for the AECO industry, but we borrowed the concept of a sandbox library from software developers. Per techopedia – "A sandbox is a type of software testing environment that enables the isolated execution of software or programs for independent evaluation, monitoring or testing."

In the context of BIM objects, a sandbox library would be very similar to the above definition, but rather than a testing environment for software, it is a testing environment for Revit families (or really any other type of content you're storing in UNIFI).

For this concept to work, you'll need to set up a library specifically for this workflow, which is illustrated in the simple flowchart below. As you can see, it is a relatively simple process and can be implemented in just a few minutes.
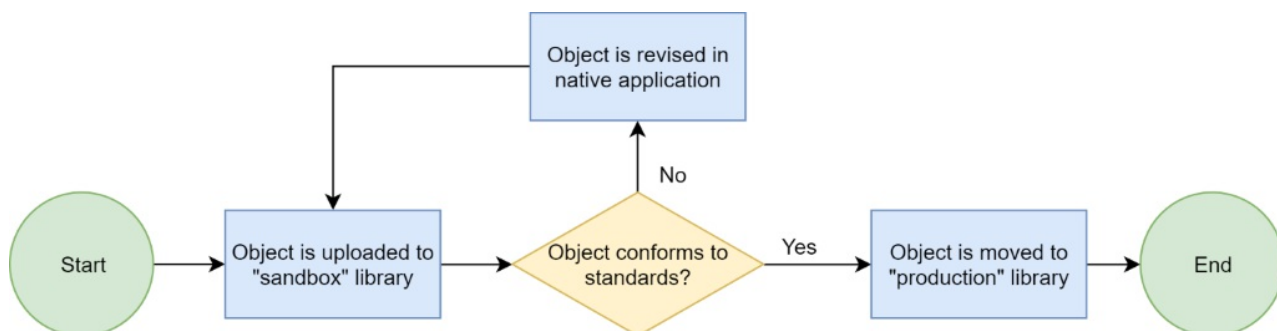
Permissions Configuration

You'll want to create a specific library dedicated to this workflow because libraries in UNIFI Pro are driven by permissions. Each library has options to grant access to specific users or groups of users as well as administrator rights for approving and rejecting content.

In addition to controlling access to the content within the sandbox library, you'll also want to identify a group of individuals who will oversee approving and rejecting the content. Remember, content is not visible to non-admin users of libraries until it's approved by an admin.

Content with the Same Name

In addition to the permissions configuration, you'll also want to keep in mind your naming conventions. Uploading a file with the same name as an existing file will create a new revision of the existing file across all libraries it's in. For example, if there's a file named "Door.rfa" in the Architecture library and a user uploads a different file named "Door.rfa" to the Sandbox library, a new revision of the existing "Door.rfa" file will be created and available in both the Architecture and Sandbox libraries.

To prevent this situation, you can add a prefix to the content before it's uploaded to the Sandbox library, such as "Temp" or "For Review." This way it won't overwrite anything in the production libraries. Once you're ready to move the file to production, simply rename it and move it to the proper libraries.

# Permissions for Testing Content

As you're planning out the permissions for access and administrators, you'll want to put some thought into who you want to vet the content. You have two main scenarios for vetting content within a sandbox library:

1. **Limited to experienced users who can upload content and test the content.** This method would best be applicable for a development library where content may be tested and developed by multiple users before adding to the main libraries once completed.
2. **All users can upload content with no approval process necessary.** Admins would then vet the content for approval into the main libraries. With this method, users should understand that using content from the Sandbox will mean the content has not been properly vetted and may therefore not adhere to company standards.

Both are viable options for sandbox libraries in UNIFI Pro; you'll need to identify which works best for your organization and assign permissions accordingly.

If your sandbox library is more geared towards the development of new families, we typically suggest that access to your sandbox library is limited to experienced users because it helps you control what content is released to your project teams. When thinking about this in terms of Revit families, it can be a major issue when unapproved or underdeveloped Revit families get into live Revit projects because it is conventionally very difficult to know which models have the most up-to-date version of the family. However, be sure to check out UNIFI's Project Analytics which helps keep track of the current revision of the families loaded into projects.

The UNIFI Pro Interface for Configuring Library Permissions
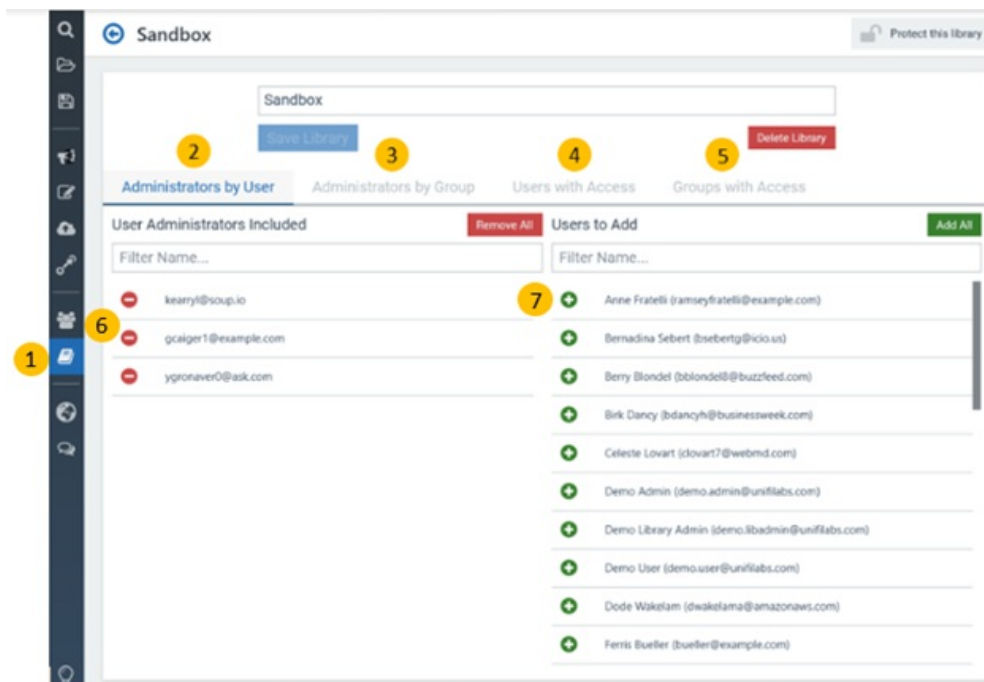
1. Toolbar – Manage Libraries
2. Tab – Assign library administrators by user
3. Tab – Assign library administrators by group
4. Tab – Grant individual users access to the library
5. Tab – Grant user groups access to the library
6. Button – Remove an existing library administrator from the library
7. Button – Add a user as a library administrator

Revisions in UNIFI

One of the highly-acclaimed features of UNIFI Pro is the revisioning system. When content is revised and re-uploaded to the library, a new revision is automatically created. These revisions automatically keep track of who changed the content and when, but most importantly, it has the capability to add notes for each revision. The ability to store multiple revisions and roll back to a previous revision is key when working on a team. You can consider this a change log and backup system all in one.


Rolling Out Approved Content

Once you're ready to roll out your tested, revised, and approved content to the rest of the team, it's as easy as flipping a few switches. There are two ways to move content from one library to another.

The first is that you'll need to navigate to the **Library Management** tab of the content.
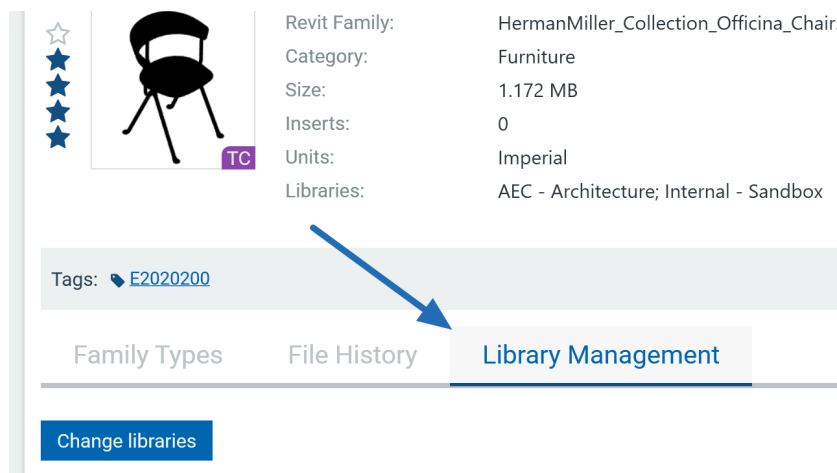
Next, uncheck the Sandbox library and check the box next to the libraries you'll want to move the content to.
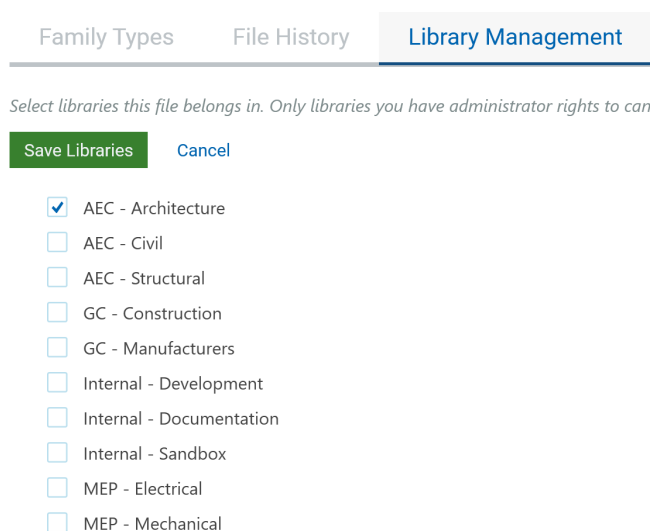
This single step removes the content from the testing ground and essentially publishes it because it will now be accessible to anyone who has access to the newly assigned libraries.

The second method is to utilize the Batch Editor tab within the web portal. Using this method, you're able to move more than one piece of content to your main libraries. You may want to vet content in batches by Revit category or by naming convention. If needed, check out our web portal video for a thorough walkthrough on how to use the batch editor.

UNIFI Pro as a Quality Control Platform

Many BIM managers tend to have the mindset that they only want "good content" to be added to their UNIFI libraries and may not move forward with a content management solution until their office content has reached a major quality control point.

Content development is a process; and while you can get your content to a stage where your users are happy, content development is never "done." As years go by, you'll continuously update and adjust your content to perform

better and better.

If you're at the stage where you're just beginning, by utilizing a Sandbox library, you're able to gain UNIFI's immediate search benefits for your project team and easily develop an intuitive and controlled environment to vet your content for your short-term goals and then eventually long-term content management goals as you continue to fine tune your Revit library.