



REVIT PURE PRESENTS
PAMPHLETS



ISSUE #1 / SUMMER 2016

WORKSETS



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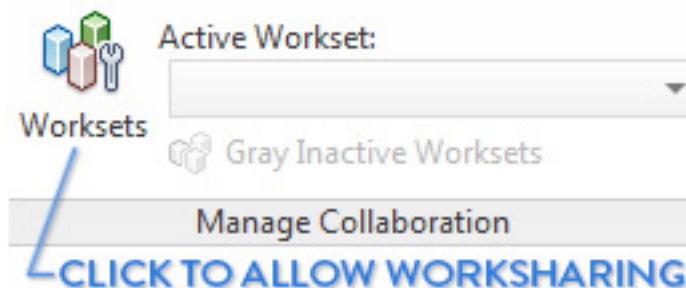
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WHAT ARE WORKSETS ?

A workset is a collection of elements. Worksets name and use are decided by users. They are usually classified by function, such as interior, exterior and site. To use worksets, you need to be in a project that has allowed worksharing.

WHAT IS WORKSHARING ?

If multiple users want to work on a Revit Project, worksharing needs to be enabled. Enabling worksharing means that worksets will be created and that the Revit file will become a central model after save. User will then need to create a local file to work on the project. Allow worksharing by going to the “Collaborate” tab and click on “Worksets”.



Smaller projects with a single user usually don't require the use of worksharing, meaning worksets are not used. If you are a Revit LT user, you cannot use worksets, so grab a drink and wait for the autumn pamphlet :)

If you are indeed working with worksets, the next pages provide 10 tips that will make your life easier and turn you into a worksets master.

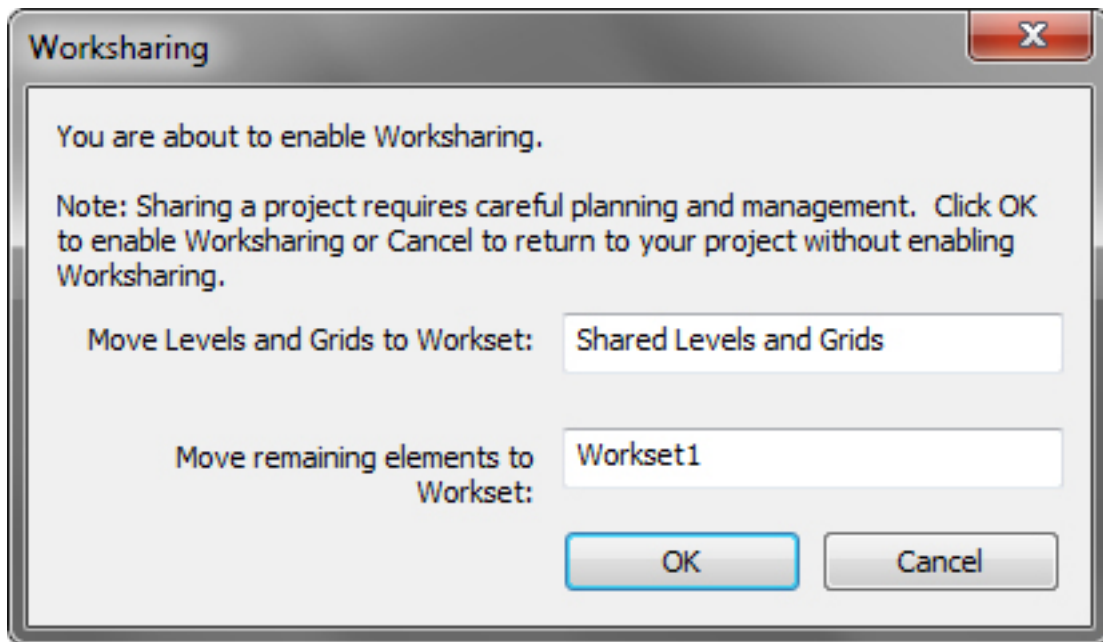


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1- ORGANIZE YOUR WORKSETS

By default, Revit will create 2 worksets once you enable worksharing:
Shared Levels and Grids and **Workset1**.



Workset1 is a very boring name and won't help our cause, so we need to rename it as well as creating other necessary worksets. You should use prefix A for architecture elements worksets and prefix Z for linked elements. Here is a typical worksets list for basic projects:

- A-Interior
- A-Exterior
- A-Site
- A-Finishes
- Shared Level and Grids
- Z-Structure
- Z-MEP

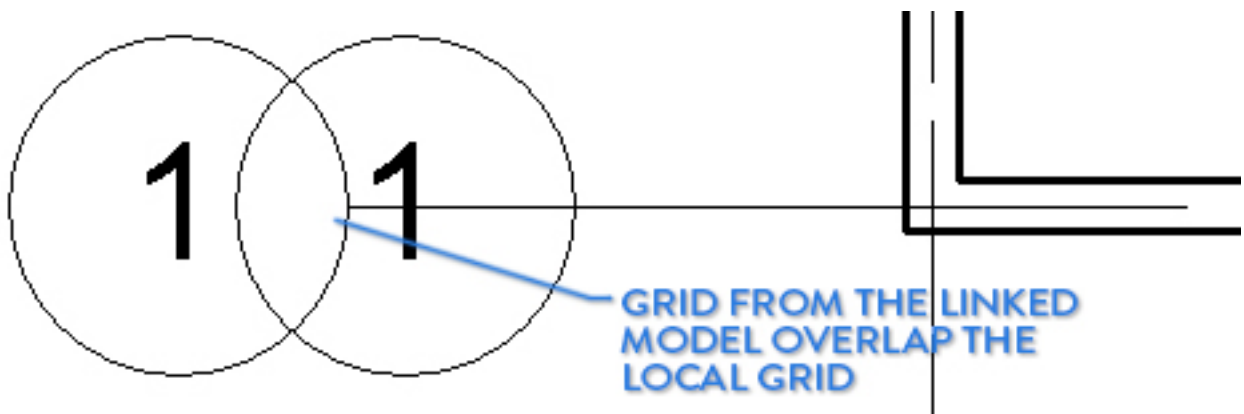


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2- PLACE LEVELS AND GRIDS ON SAME WORKSET

If you are working with engineers, consultants, designers that are using your model in a linked file, it is crucial that you enforce the proper use of **Shared Levels and Grids** workset. If you don't do so, the consultants you work with will see your grids and worksets in each of their views, like in the image below.



While you can use **Visibility Graphics** or **Hide Element** to remove these overlapping grids, this is a tedious process that can be simplified by using worksets correctly.

In the **Manage** tab, select **Manage Links**, click on the correct revit link and then click on **Manage Worksets**. You can then close every worksets you don't want to see. In this case we would close **Shared Levels and Grids** from the linked model, solving the problem above.



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3- CREATE A WORKSET FOR EVERY LINKED REVIT MODEL

Each linked model should be put on a separate workset. Remember to use prefix **Z** before the workset name to distinguish from worksets on your own model. For example, if you receive a model from the structural engineer, create workset **Z-Structure**. Receive a model from Mechanical engineer ? Create **Z-MEP**. Model from a designer ? Create **Z-Design**. You get the idea.

This technique allows simplified control on linked files. You can close worksets containing linked models or set them to **not visible**, making your own model much faster.

4- CLOSE WORKSETS YOU DON'T USE

There is two way to shut down worksets from appearing on your views. The first is to close the workset. **Closing a workset only affect your local model**, meaning it will still be visible to other users.

You can also set workset to **not visible** by default, which is a change that will be effective to the central file and to every users. You can still make a workset visible on a specific view by using **Visibility Graphics**.

Closing a workset is the best method for model performance, while using **not visible** by default is the best method to control overall visibility.



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5- UNDERSTAND WHAT “EDITABLE” WORKSET MEANS

Active workset:
A-Interior (Not Editable) Gray Inactive Workset Graphics

SELECT “YES” TO BE THE SOLE OWNER OF THIS WORKSET.

Name	Editable	Owner	Borrowers	Opened	Visible in all views
A-Exterior	Yes	RevitPure		Yes	<input checked="" type="checkbox"/>
A-Interior	No			Yes	<input checked="" type="checkbox"/>

An EDITABLE workset mean you are the sole owner of that workset. That can be confusing since you could think something being editable means it can be modified by anyone. No, it means you locked it. Other users cannot make any modifications to elements that are part of it unless you grant them the right to do so. There is **two main reasons** you would want to use this:

1- **Permanent lock on critical part of the project.** For example, you can make “**Shared Grids and Levels**” editable, which means other users have to ask your permission to modify elements that are part of this workset, therefore protecting your precious grids from being deleted. The workset will remain editable until you use the **Relinquish All Mine** command in the Collaborate tab.

2- **Temporary lock for worksets undergoing major change.** Let’s say there is major changes on every exterior wall and you are the user assigned to do the change. It would then make sense to set the A-Exterior workset to **editable**, preventing other users from interfering with your work without your approval.



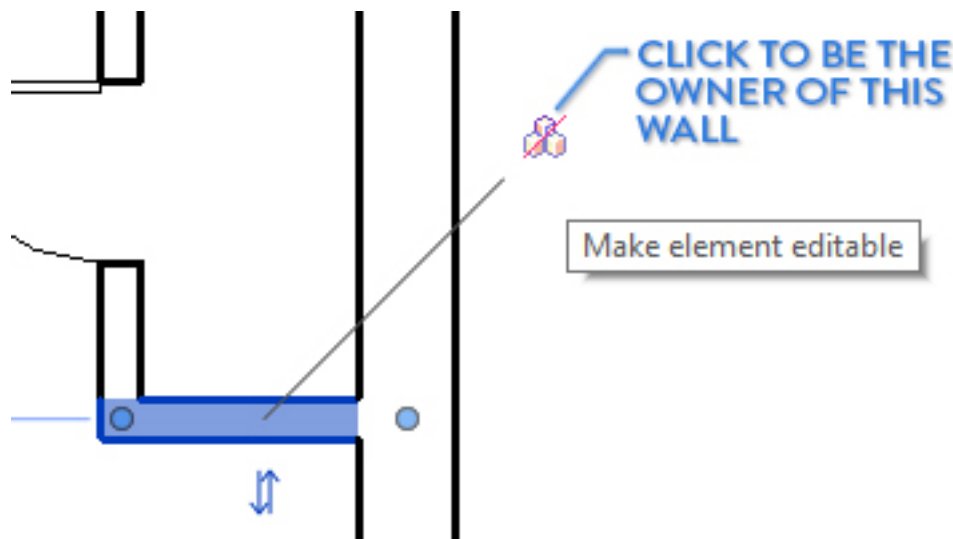
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6- SET ELEMENTS TO “EDITABLE” TO CONTROL THEM

Making a whole workset editable can be a serious annoyance to your colleagues. That means each element they want to modify on the workset you made “editable” has to be approved by a request.

Often it is better to make **elements** editable instead. You can do this by clicking the icon with 3 cubes that appears next to a selected element. This will prevent other users from making changes to this wall without your approval.



When you quit Revit, make sure you **Synchronize with Central**. If you don't do so, Revit will ask if you want to **Relinquish Elements** or to **Keep Ownership**. Unless you want to block changes to elements you own, it is almost always better to use the first choice and to **Relinquish**.

Every Revit user had issues with colleagues that left the office while still owning walls that needed to be changed. In case of doubt, always **Relinquish!** Else, you might feel the wrath of colleagues the next morning.



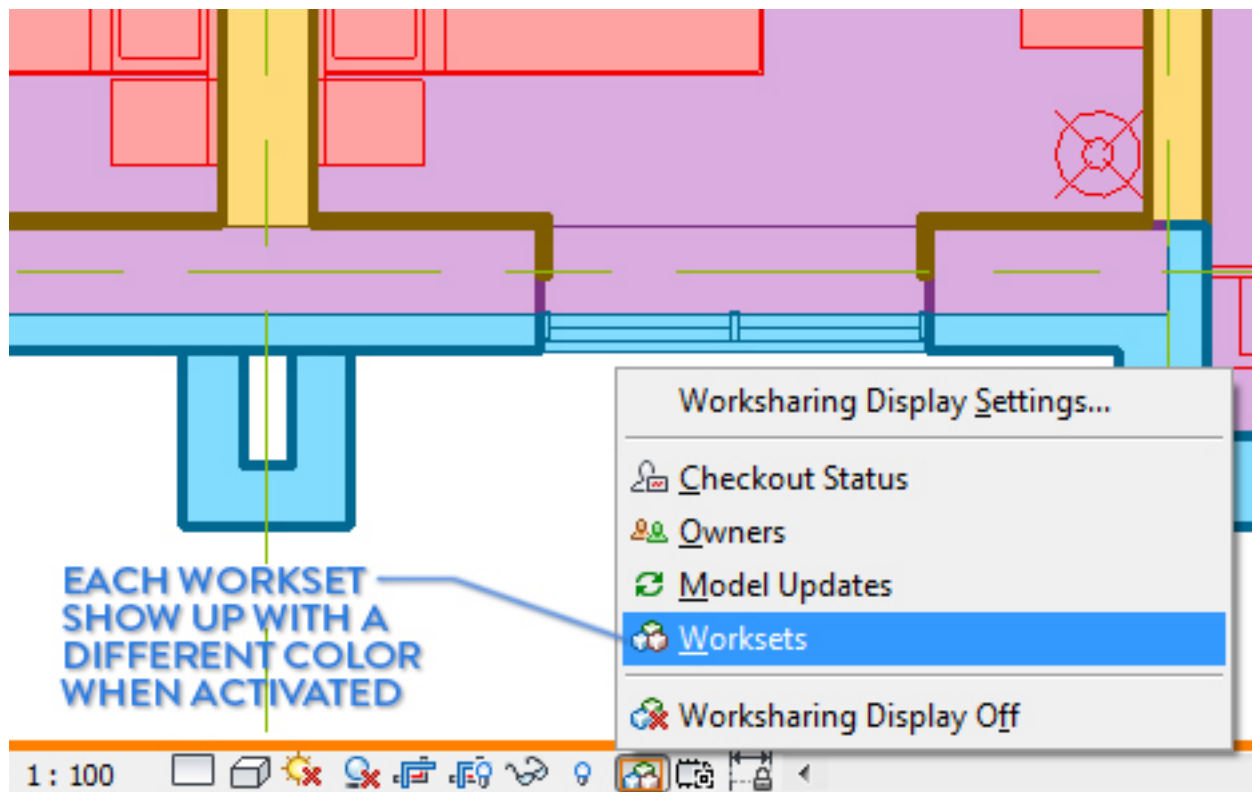
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7- CLEAN YOUR WORKSETS EVERY FRIDAY

People forget to model things in the right workset. Not a big deal, but you need to clean worksets weekly to make sure you don't lose control. Why friday ? Because you leave for the weekend with a peaceful mind knowing your model is under control.

The easiest way to make sure elements are in the right workset is to use **Worksharing Display** and set it to **Worksets**. You can find this tool on the bottom left of your screen, next to the Reveal Hidden Elements lamp-shaped button. You can change the color associated to each workset by clicking "**Worksharing Display Settings...**".



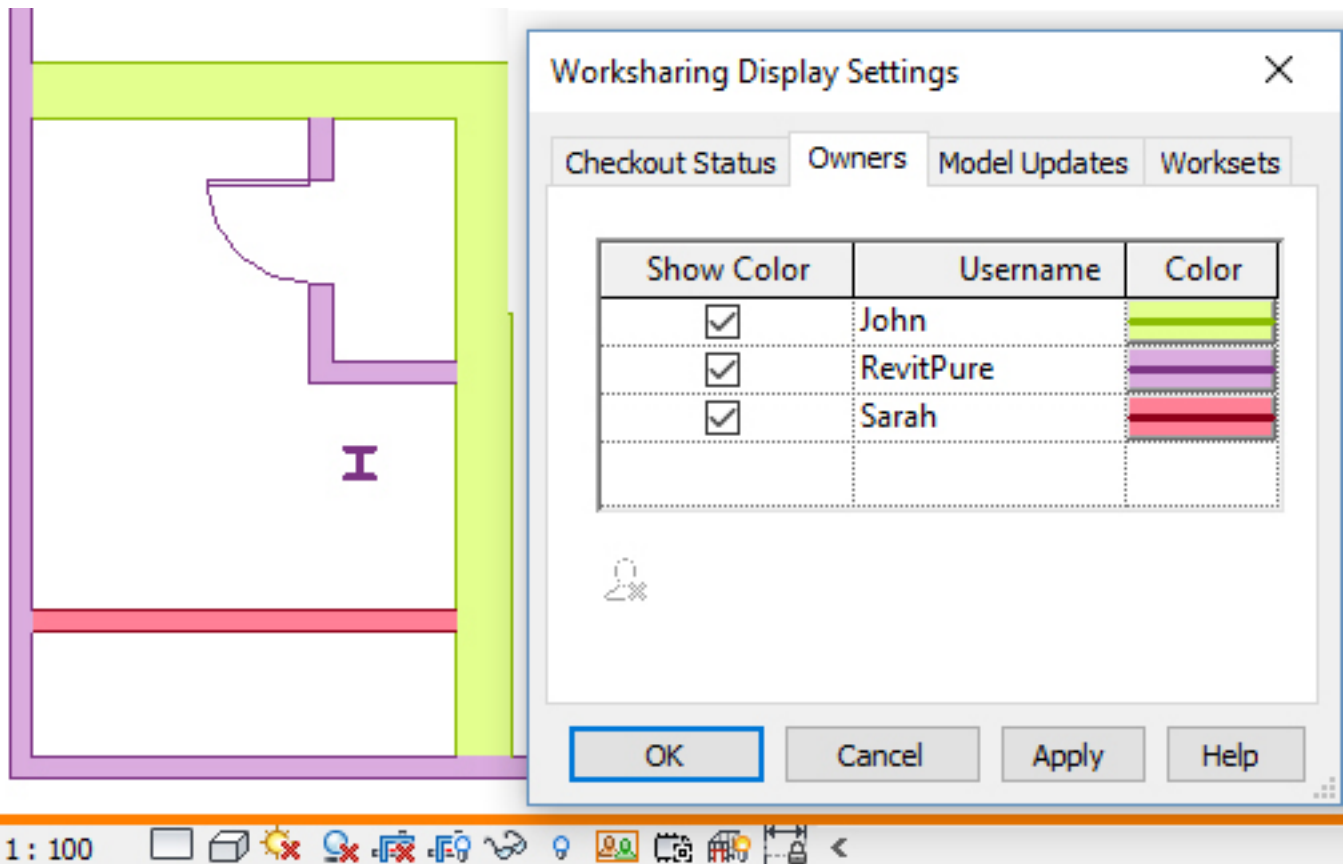


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8- USE WORKSHARING DISPLAY TO KEEP TRACK OF YOUR MODEL

When you open a large project with many users, you might wonder what is everyone up to. By turning on **Worksharing Display** and setting it to **Owners**, elements will be colored to match the owner.



In the above image we know that user RevitPure is working on the WC and the exterior wall. Meanwhile Sarah is making changes to the closet. If you are John and you try to modify an exterior wall, user RevitPure will receive an editing request. This tool is useful to have a quick glance of what is going on the project.

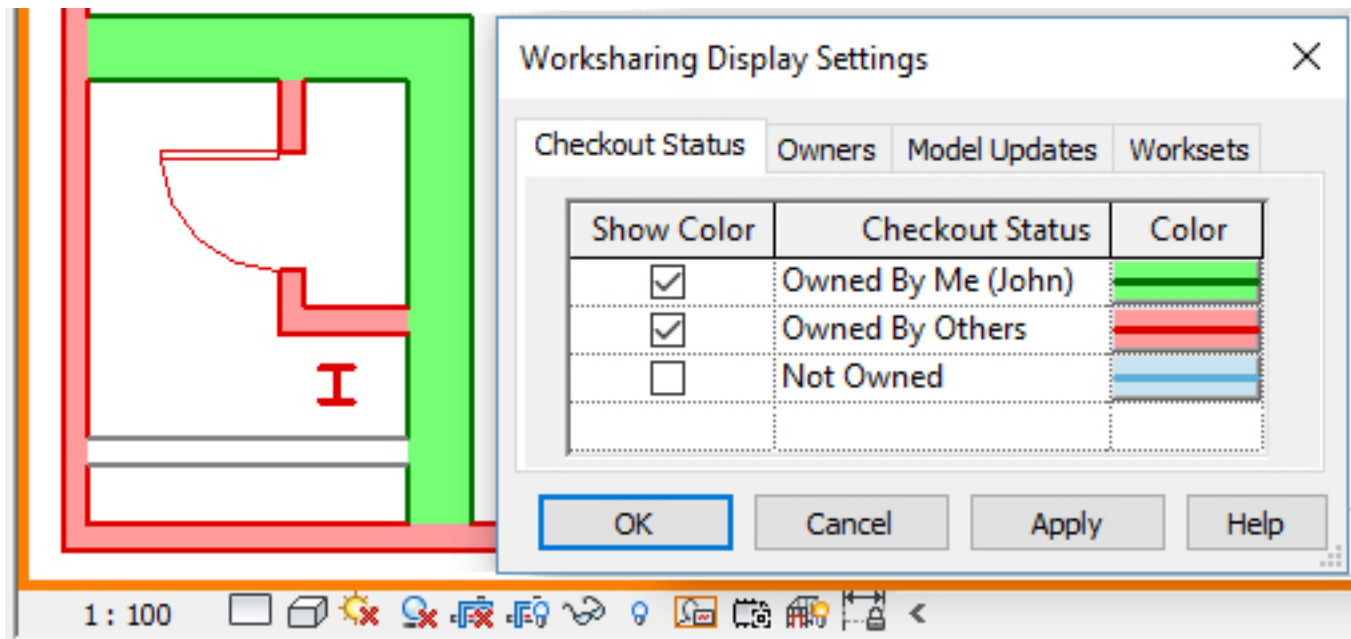


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9- USE CHECKOUT STATUS TO AVOID REQUESTS

In addition to knowing who owns what, you can also set **Worksharing Display** to **Checkout Status**. This allows you to see what you are allowed to modify without having to send an editing request. Everything in red is owned by someone else. Everything green is owned by you. The rest is owned by no one. That means you are free to make changes to these elements without having to bother anyone.



10- CREATE WORKSET A-FINISHES

If you are on a larger project that requires finish plans, you should make sure you model separate thin ceramic (or carpet) walls and floors, and set them to A-FINISHES. This way finishes and their complex pattern can be easily shut down in big scale floor plan. Set “A-FINISHES” to **not visible** by default, and only open the workset in required views. Note: advanced users usually don’t use worksets to control visibility. The “best practice” workflow is to use filters, visibility graphics and view templates.



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