

Revit Transition Plan

TRANSITION PLAN: REVIT ARCHITECTURE

OVERVIEW

This document outlines a plan to transition from AutoCAD or AutoCAD Architecture to Revit. The intent of the document is to bring to light items to consider when making the transition and to help foster discussions leading to a transition plan tailored to meet your needs. We have identified three transition phases and summarized each below. Additional details on each phase follow.

PHASE 1: Setup and Templates

This phase primarily consists of the preparation of resource files so that when users start their project they can focus their attention on the design rather than looking for content. (Users will have their hands full learning this new program.)

PHASE 2: Introductory Training

While it is true that several “core” features of Revit are easy to learn, there are many aspects of the program that are fundamentally different than AutoCAD. Given the fact that staff will be expected to produce the same quality drawings, in the same time, as with software they’ve used for years, it’s essential that users learn the basics of the software before beginning their design.

PHASE 3: Production Support

In order to meet deadlines on your first project, it’s critical to have someone with strong Revit experience available to assist. As many of these tasks will be project specific they could be incorporated into the project billing. Tasks performed in this phase include:

- Project organization and Workflow
- Assistance with modeling
- Additional Training Workshops
- Additional Content Development
- Detail & Symbol Library

Revit Transition Plan

PHASE 1 – SETUP AND TEMPLATES

The following is a list of setup items which can and should be completed prior to starting your first project. If time does not allow all items to be completed ahead of time, some items can be developed as the project progresses.

We have prepared a project template that captures a majority of the items mentioned here. Use of the template can eliminate about 3 days of this 5 day process.

SERVER AND WORKSTATION SETUP – 2 HOURS

- Create Server Folders
 - Revit Library
 - Client Library
 - Import-Export Translation Files
 - Object to layer mappings
 - Lineweight settings
 - Installation-Setup
 - Keynotes
 - Materials-Pats-Rendering
 - Reference Docs
- Shared Parameters
- Templates
- Training Files
- Project Folders on Server
 - Families
 - Groups
- Project Folders on local System
- Change startup icon to run batch file to copy standard revit.ini

TITLEBLOCK SETUP – 4 HOURS

- Cover and Title Sheets
- SK Title blocks - 8-1/2" x11", 11 x17
- CD Title blocks - 24x36, 30x42, 36x48
- Presentation Title blocks

PROJECT TEMPLATE SETUP - GRAPHIC CONVENTIONS – 4 HOURS

- Text Types
 - Arial 3/32"
 - Arial Narrow 3/32"
- Styles to support titles & title blocks
 - Dimensions
 - Standard
 - Standard + CL
- Callouts
 - Section Marks
 - Building Section
 - Wall Section
 - Working Section
 - Elevation Marks
 - Interior
 - Exterior
- Detail Marks
- Title Marks etc.
- Tags
 - Room Tags
 - Door Tags
 - Window Tags
 - Wall Tags
 - Equipment Tags
 - Casework/millwork
 - Ceiling Tags
- Misc. Symbols
 - North Arrow
 - Column grid bubble
 - Datum mark
 - Match line

PROJECT TEMPLATE SETUP - CORE BUILDING COMPONENT FAMILIES – 2 DAYS

- Materials, line styles and fill patterns to support objects
- Wall Types
- Door Types
- Window Types
- Floor Types
- Stair Types
- Railing Types

Revit Transition Plan

PROJECT TEMPLATE SETUP – LEGENDS – 1/2 DAY

- General Notes
- Plan Notes
- Demo Notes
- Demo Legend
- Symbols & Abbreviations
- Code Legends

PROJECT TEMPLATE SETUP - ORGANIZATIONAL STRUCTURE – 4 HOURS

- View Templates
 - For each view type
- Custom Parameters
 - View Category
 - Sheet Category & Sheet Sub-Category
- Phasing
 - Change phase name from “Existing” to “Original Conditions”
 - Change phase filter name from “Previous” to “Existing to remain”
- Browser Organizations
- Views
 - All
 - By View Type
 - By Phasing + View Type
 - By View Category
 - By View Category + User Defined
 - Not On Sheets
 - Drafted Views Only
- Sheets
 - All
 - By Sheet Category
 - Create categories for each consultant
 - Presentation
- Named Plotter Setups

PROJECT TEMPLATE SETUP – SCHEDULES & REPORTS – 4 HOURS

- Door Schedule
- Room Finish Schedule
- Room Area Schedule
- Window Schedule
- Wall Type Schedules
- Furniture Schedule
- Equipment Schedule
- Drawing Lists
 - Architectural
 - All other disciplines
 - Civil/Survey
 - Electrical
 - Interiors
 - Mechanical
 - Plumbing
 - Structural

PROJECT TEMPLATE SETUP - PROTOTYPE SHEET SET – 2 HOURS

- Cover Sheet
- A0
 - Abbreviations
 - Graphics Legend – Plan
 - Graphics Legend - RCP
- A1
- A2
- A3
- A4
- A5
- A6
- A7
- A8
- A9
- Sheets for all other disciplines to support Cover Sheet Drawing lists

PHASE 2 – INTRODUCTORY TRAINING

Revit offers a fundamentally different approach to producing construction documents than most other CADD programs: create a 3D model of the building and many of your construction documents (plans, elevations, sections) are completed by looking at a different “view” of that model. In order to create the 3D model, users must learn the specialized tools for each building element and how to make each element interact properly with the other elements. Training is essential if staff is to deliver their first project on time.

Our introductory training program reviews project workflow and use of each of the core building modeling and annotation tools. After completing introductory training, staff will know the key features and how to get started on their first Revit project.

There are many logistical options to discuss related to training such as on-site or off-site, hands-on or lecture style, multi-day sessions or short workshops, type and size of projects and project teams, schedule, resources, etc. Timeliness is one of the most important factors to determine overall success. Our recommended training is a 2+1+1 schedule that coincides with project startup - two consecutive full days of training in the first week and an additional full day of training in each of the two subsequent weeks. Project work begins after the first two days of training.

It's worth restating that this is a recommendation and exact training scope and approach will vary depending on each office's needs. All of the options mentioned above should be discussed in detail to determine an optimum approach.

INTRODUCTORY TRAINING – Four Day Sample

DAY 1

- Conceptual Overview
- Adding Walls
- Selecting & Modifying Objects & Dimensioning
- Exterior Elevation Views & Levels
- Modify Commands
- Adding Doors
- Adding Windows
- Column Grids & Columns

DAY 2

- Rooms
- Duplicate Plan Views & View Property Basics
- Annotation
- Tagging and Schedule Views
- Adding Components
- Views & Visibility Graphics
- Floors
- Section Views
- Ceilings
- Roofs

DAY 3

- Stairs, Ramps & Railings
- Curtain Walls
- Wall Construction
- Interior Elevation Views & Fine Tuning Views
- Custom Geometry (Massing) and Families (In-Place)
- Sheets & Plotting

DAY 4

- Worksets & Worksharing
- Phasing
- Detail Views and Detailing
- Linking\Importing\Exporting CADD Files
- Groups
- Design Options

ADDITIONAL WORKSHOPS

- Wall Construction
- Custom Families Overview
- Custom Windows Families
- Custom Doors Families
- Profile Based Families (Sweeps, reveals)
- Annotation Families
- Ceiling Hosted Families
- Site Modeling
- Sharing with Consultants
- Area (analysis) Plans
- Rendering
- Structural Components
- Visibility / View Templates / Object Styles

PHASE 3 – PRODUCTION SUPPORT

As the name suggests, Phase 2 training “introduces” all the key concepts of the program. After introductory training there is still much learning to do. Even in a four day introductory course there is not enough time to cover all the essential tools. Undoubtedly, there will be many questions each and every day on the first project regarding how to use each tool, how to control graphics and regarding workflow. There will also be requests for custom graphics. So to ensure that your Revit project is a success we offer “Production Support” services. As many of these tasks will be project specific, they could be incorporated into the project billing.

Continuing education and project support and can be delivered through regularly scheduled on-site visits or remotely through on-line meetings. Face to face support is great but since we can't be on site every day, remote support through on-line meetings provides excellent support and allows for quick turnaround. A combination of the two is probably best. Whether on-site or remote, we can assist project teams, conduct additional training or refresher workshops, or proactively develop standards, best practices, and additional content such as detail libraries.

After completing the first project, you will be ready to move your capabilities to next level with BIM (Building Information Modeling). For many this will mean providing additional services focused on *analysis* of the model. You choose the type of analysis which best fits your clients' needs and your business objectives and we can help you figure out the best way to perform the analysis. Examples of some of the types of analysis which are already being performed include cost, construction sequencing, heating, cooling, solar, water usage, pedestrian flow, etc.

Continuing education workshops and regularly scheduled support sessions provide a great way to continually improve productivity, expand capabilities and move to this next level of design and service.

LIBRARY DEVELOPMENT - CONVERT OR CREATE SUPPORTING FAMILY LIBRARIES

- Material Library – to support component and family development
- Component Library
 - Furniture
 - Plumbing
 - Accessories
 - Equipment
 - Tel Data Symbols
 - Lighting
 - HVAC
- Detail Library
 - Partition Types
 - Door and Frame Elevations
 - Frame Details
 - Casework/Millwork
 - Floor Transition Details
 - Toilet Accessories
 - ADA