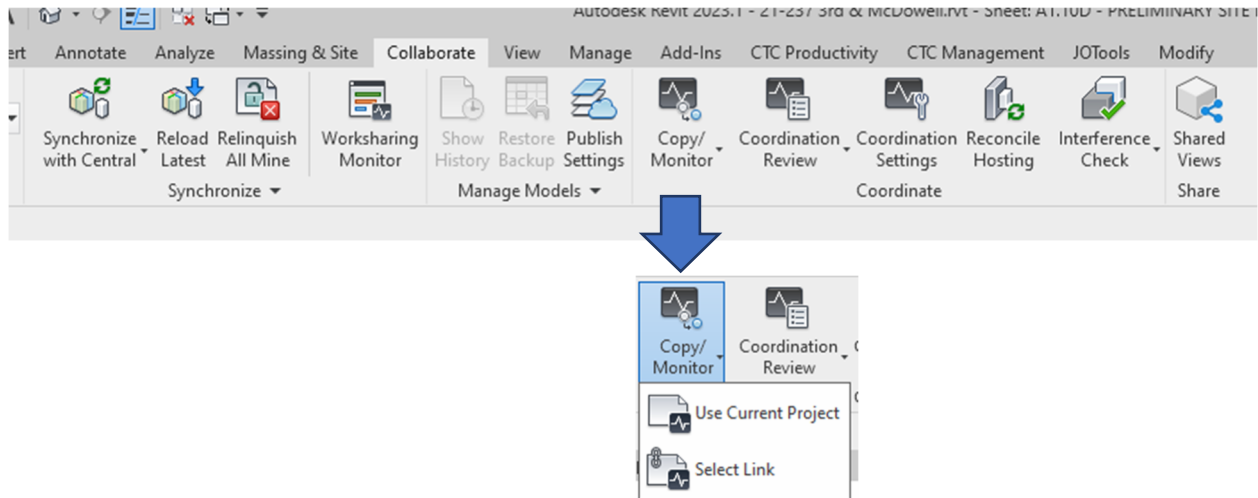


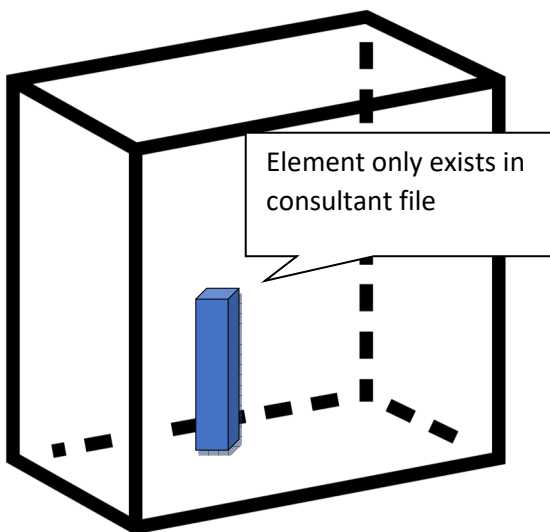


COPY MONITOR

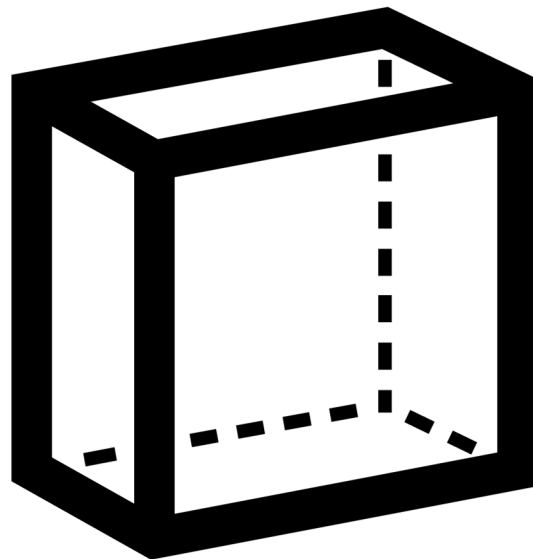
Copy/Monitor is a function in Revit that's geared towards coordinating elements between disciplines. This is a feature that will become more and more prevalent as other consultants start migrating to Revit. This can be due to client requests or a change in office culture to adopt new technologies.



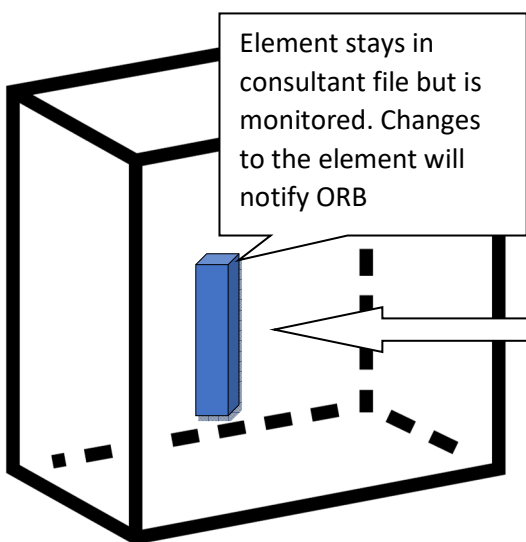
By using Copy / Monitor, Revit will copy in elements from the consultant file that ORB will be able to use, coordinate, manipulate and adjust. We can also use copy monitor on ORB elements to notify consultants of any changes we do in the ORB model.



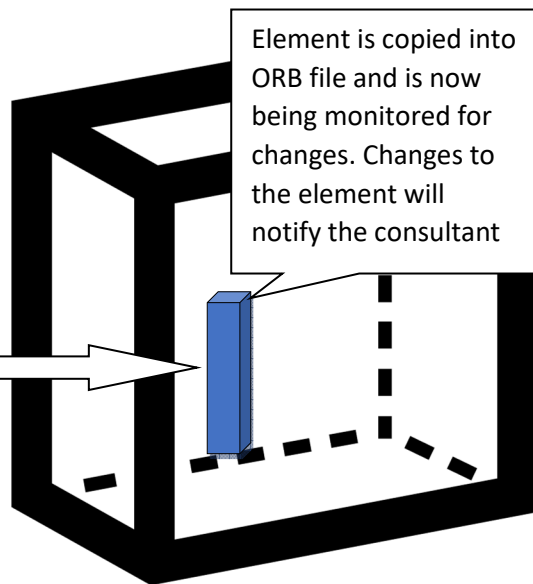
CONSULTANT RVT FILE



ORB RVT FILE



CONSULTANT RVT FILE



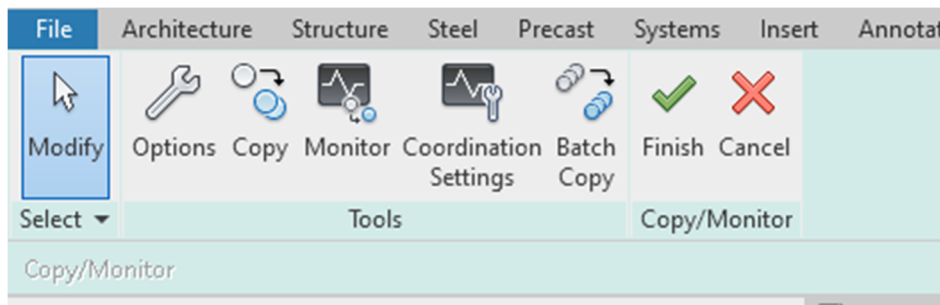
ORB RVT FILE



COLLABORATE TAB

1. **COPY / MONITOR PULL DOWN**
2. **SELECT LINK** – Choose the link that has the items you need to coordinate with the owners of the linked file.
3. **CLICK ON THE CONSULTANT FILE**

Once you select the consultant file you will see a new tab appear:



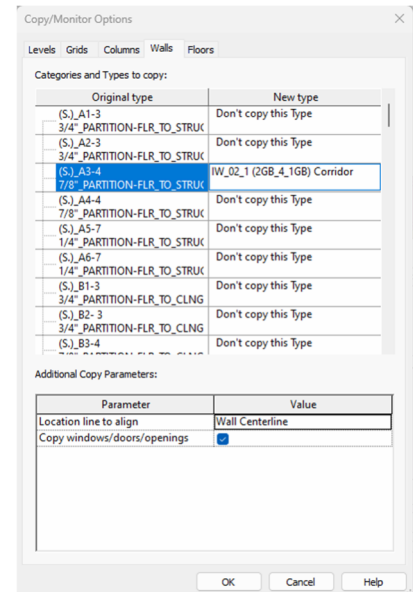
OPTIONS:

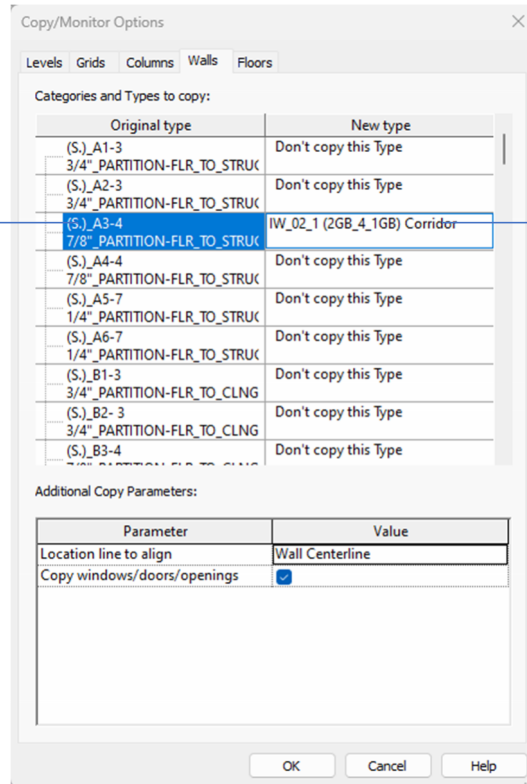
Options will let you path copied elements into a specific category type. These only apply to Levels, Grids, Columns, Walls, Floors. The options tab will permit you to set up rules that will apply to specific types.

Example: A consultant file has wall types of their own. These walls don't have the ORB embedded information in them and when showing up in ORB plans won't display the required information, such as fire rating, load bearing status, etc.

By setting up the rules in the Options tab you don't need to keep swapping out elements every time you update a consultant file.

Copy/Monitor Options will let you path a Category Type from the consultant file into one of our standard category types. This way every time you copy that specific ex Wall Type, then it will copy it as the standard wall we use for it. This will let you tag the element on our model, while keeping it connected to the consultant model.





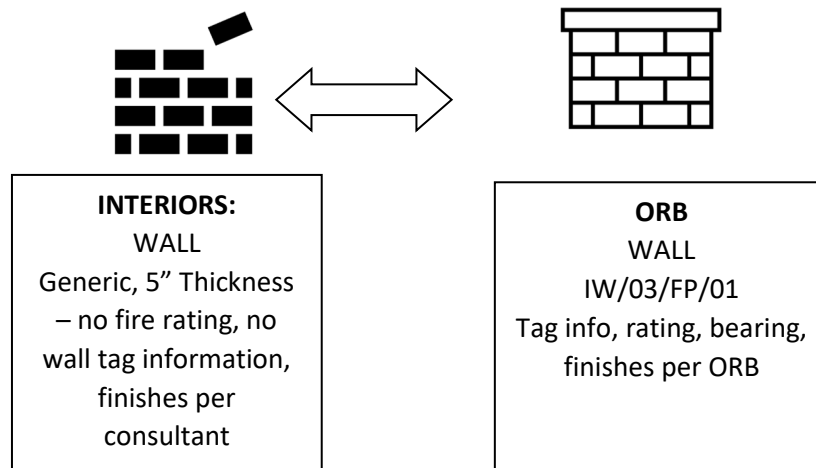
These are the consultant's model category types.

These are our model category types within our Model



COPY:

Makes a duplicate of the consultants element and brings it into your project (live). The element in your model and in the consultant model will be linked, but will not have to be exactly the same. They can become different types based on the categories. This is especially useful for Architectural Categories such as Levels, Grids, Columns, Walls, Floors.



MONITOR:

Creates a link between elements that will notify you if anything has changed in the “monitored” element. This can be anything from changes in type, position, size and parameter values.

Monitored elements will display a link icon.



COORDINATION SETTINGS:

BATCH COPY:

Batch Copy will let you do the same as copy without having to engage the command multiple times.



COORDINATION REVIEW:

Coordination Review is where all changes to monitored elements are reflected. You will get the option to Do Nothing, Accept or Deny changes. When accepted copied elements will automatically get modified to match the element its being monitored against.

Coordination Review

In host project In a linked project

Group by: Status, Category, Rule

Message	Action	Comment
[-] New/Unresolved		
[-] Levels		
[-] Maintain Name		
[-] Name changed	Do nothing	
20-171_Maza_ID_R23.rvt : Streetsense - ID : Levels : Level : FITNESS : id 3518543		
Workset1 : Levels : Level : HIDE : id 1834700		
[-] Maintain Position		
[-] Level moved by 5' - 6"	Do nothing	
20-171_Maza_ID_R23.rvt : Streetsense - ID : Levels : Level : FITNESS : id 3518543		
Workset1 : Levels : Level : HIDE : id 1834700		

Show:
 Postponed Rejected

[How do I use Coordination Review?](#)

Show Create Report OK Apply Cancel



ACTIONS:

POSTPONE / DO NOTHING

Take no action. This value leaves the change to be addressed at a later time – **no changes will occur**

REJECT

Select this action to indicate that the change made to the element in the current model is incorrect. The consultant will receive a notification that what they changed is not accepted or correct – **no changes occur to ORB elements.**

ACCEPT DIFFERENCE

Select this action to indicate that the change made to the monitored element is acceptable, and to update the relationship without changing the corresponding element. The monitored elements will be different. **No changes will occur to ORB elements.**

MODIFY

This will adjust the ORB model to match the consultant model. Consider what the changes will imply for your project: types, dimensions, materials, embedded information, etc. – **changes will occur to ORB elements.**

RENAME

Select Rename to apply this change to the corresponding element in the current model (grid line numbers/letters, level names, etc. – **ORB elements will be re-named.**

MOVE

Select Move to apply this change to the corresponding element in the current model – **ORB elements will be moved.**

MOVE FIXTURE IN HOST TO POSITION FIXTURE IN LINK

Select this action to move a fixture in the host model to the location of the fixture in the linked model. This action only works for fixtures that are not hosted. – **changes will occur to ORB elements.**

IGNORE NEW ELEMENTS

These elements will not be monitored going forward – **no changes will occur to ORB elements.**

COPY NEW ELEMENTS

Select this option to copy the consultant elements into your project. They will be monitored from this point on – **elements will be added to ORB model.**

DELETE ELEMENT

If a monitored consultant element has been deleted, this action will delete the element in the ORB model and will no longer be monitored – **elements will be deleted from ORB model.**



COPY SKETCH

The sketch or boundary of a monitored opening has changed. Select this action to change the corresponding opening in the current model. If a floor slab boundary is edited, this action will update the monitored slab in the ORB model – **changes will occur to ORB elements.**

UPDATE EXTENTS

The extents of a monitored element have changed. Select this action to change the corresponding element in the current model – **changes will occur to ORB elements.**

BEST PRACTICES:

1. Coordinate with your Revit consultants and BIM manager before you start sharing files. Set up ground rules to manage expectations and limits of what will be coordinated through this tool.
2. Keep the monitored objects to the minimum. Too much monitoring will cause your file to be slower and you will have to deal with constant notifications of elements that may have been moved or altered by you or by the consultant.
3. If you have elements that will no longer need to be monitored, remove the monitoring, but always maintain a line of communication with the consultants.
4. Be aware of the elements worksets. Consultant models need to be in their own worksets. The elements you bring in must also be placed in the correct worksets.