



This Month:

## **Management of Central Files** (part 2 of 2)

Welcome to **INFOCUS**, C3 Consulting Solution's Monthly Newsletter. This month, we complete our look at Management of Central Files when using Worksharing.

---

Last month we started to explore management of central files. We established some best practise approaches to worksharing:

- Establish a simple but effective file naming convention
- Establish procedures for creation of local files from the central (consider automating this)
- Relinquish borrowed elements or worksets regularly
- Don't borrow worksets unless absolutely necessary

This month, we're building on this, looking at issues that you may run into while managing projects using worksharing.

Some architectural projects are quite large and will demand more of your hardware. It's then important to maintain these project files to keep them operational.

### **Periodically open and *audit* your central file.**

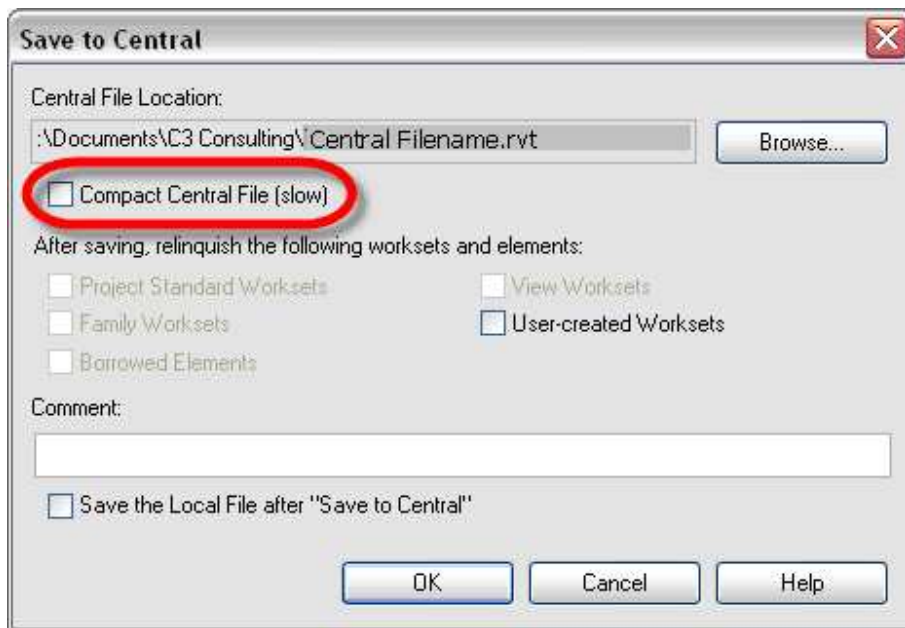
Usually, and as stated in last month's newsletter, you should avoid opening the central file directly. However, this is an exception to that rule, and it is recommended that you do this only when others aren't trying to access the file, and should ideally be done by the project's Revit leader. Auditing the central file will take more time than would otherwise be required to simply open the central file. The time it takes overall will depend on the size of the file and the complexity of the model. Revit will perform housekeeping operations, checking the integrity of the file and fixing errors that it can.

### **Periodically *compact* your central file.**

Large projects typically grow into large files, which can end up being difficult to manage. STC (Save to Central) times can blow out, despite your best efforts to keep

the model neat and tidy. Most of the things that contribute to the size of the model relate to how the model has been constructed, and as such, your ability to minimise the size without touching the model is limited.

You can perform an STC with the *Compact Central File (slow)* option checked. During this process, the file is rewritten without any redundant parts. This will result in a smaller, more compact central file. Time taken during this step may be considerably longer than a normal STC, so you should only do this at appropriate times (e.g. at the end of the day). Reductions in file size will vary according to the amount of redundant data in the model, but improvement of 15-25% is typical.



On occasion, you may notice the file size grows, rather than shrinking. If this occurs, perform the operation again, and check the size once more. This can be all that is required.

## Review Warnings

Use the *Review Warnings* feature (via the Tools menu) to ensure the list of warnings doesn't get too large. By definition, errors can't be ignored, but warnings can. Some warnings will refer to cosmetic issues, while others are more critical. Preventative efforts to eliminate complaints Revit makes about your model are far better than reactive work and costly delays.

## Project Structure

Minimise your in-place families (essentially those that don't start their lives as a family template, and/or can't be moved from one project to another), as these reside only in your project. The definitions of these must be contained, remembered and managed fully within and by your project.

Don't use excessively 'heavy' families – i.e. overburdened with flexibility or super complicated geometry. Use levels of information appropriate to the task at hand and the needs of the project, not just because of novelty value.

### **Periodically create new local files**

There is some conjecture as to how necessary this is or how frequently it should occur, but to maintain maximum integrity of local files, it is suggested by some to create fresh local copies on a regular basis.

In practice, sometimes creating a new local file is necessary if the link between the old local file and the central file becomes broken. In this case, changes not saved to the central file will be lost. This is a good reason to STC religiously, to minimise any potential data loss.

Moreover, if a user is away from the office or doesn't work on their local copy for a time, the remaining team may progress the project. Consequently, the information gap between the central file and the local file of the absent user grows ever larger, making it more difficult for Revit to reconcile when they return.

As a best practice methodology, it would be better for that user to create a fresh local file upon their return. This ensures that the data gap is minimised, thus eliminating potential problems that may otherwise be experienced.

### **Save to Central interval**

Appropriate time intervals for *Save to Central* action also depends on the size and complexity of each project. The longer the gap between STC times; the longer the STC time, and the more changes that Revit will have to reconcile.

However, if the process takes five minutes on each occasion (it can take less or more depending on how well the project has been structured), doing this every half hour may not be seen as worthwhile.

A recommended starting point would be to save to the local file each half hour, and save to central every two hours. However, you may like to adjust this to better suit your project. In practice, if you are keeping your central file working smoothly, you might save to central every half hour along with your local.

Note: It is important to remain disciplined in doing this when Revit reminds you, otherwise you can go for an entire day dismissing these reminders (deemed inconvenient at the time), and then have your system crash, and all of your work is lost. Most would agree this is *far more* inconvenient!

## **Watch out for**

### **Renaming Central Files**

If you should find yourself needing to rename the central file (perhaps to adopt a better naming convention, for example), there are a few things you should do.

Firstly, ensure that all users have relinquished everything – both elements and worksets. Then ensure that their local files are closed. You cannot simply rename a central file, as the central file location is defined within the file itself. The associations built into the files relating to worksets and central vs. local relationships will be lost, and you will be presented with a dialog that states:

*"The central file location cannot be found. It is still possible to begin editing worksets that are currently not editable but changes may be lost when you reconnect to the central location"*

You should instead:

1. Open the existing central file.
2. Go to the File menu and select 'Save As'.
3. Select Options button from the Save As dialog.
4. Check 'Make this central file after save'
5. Enter the new central file name (and location, if required)

Now your new central file will have been created properly, and new local files can be created.

### **Recreating Central Files from backups**

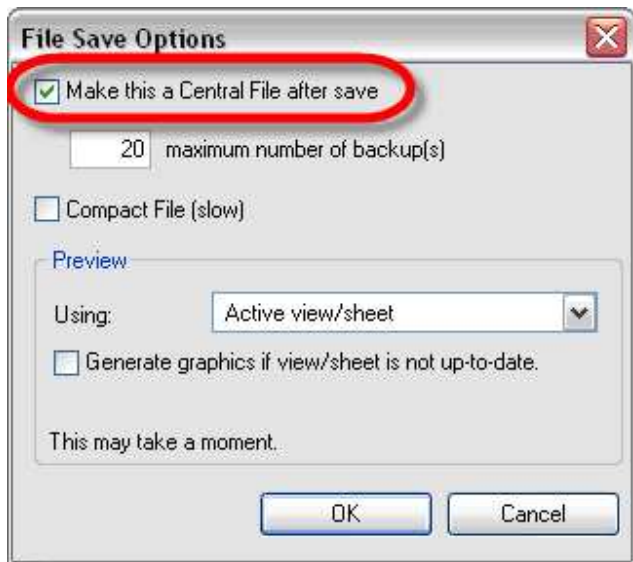
Should you ever find that your central file is corrupted, you will need to make a new one. One method is to recreate the central file from its backups. To do this:

1. Move corrupted Central file to a different folder location or rename it so as to hide it from the backup mechanism within Revit.
2. From the File menu (within Revit), select Backups.
3. In the 'Browse for Folder' dialog box, navigate to the Central file's backup folder and click OK.
4. If you receive a message informing you that the file does not exist, click OK to recreate the file from backups.
5. Once the file is recreated, the Backup dialog box is displayed. Close it but don't select anything.
6. Open the new Central file.

Another method is to take a selected local file and turn it into a new central file. This may or may not incur data loss (depending on who's changed what, when and how long ago any changes were saved).

To do this:

1. Firstly check that all items have been relinquished from the local file and that any changes have been saved (locally).
2. Next, select 'Save As' from the File menu, and click on the Options button.
3. Ensure that the 'Make this Central location after save' option is checked.



## Summary

To recap, as part of your best practise approach to worksharing, remember to:

- Establish a simple but effective file naming convention
- Establish procedures for creation of local files from the central (consider automating this)
- Relinquish borrowed elements or worksets regularly
- Don't borrow worksets unless absolutely necessary
- Periodically audit the central file
- Periodically compact the central file
- Periodically review warnings
- Establish and maintain a good project structure (This notion of 'good project structure' could be a worthy subject for an entire newsletter by itself)
- Periodically create new (fresh) local files

Managing projects using worksharing need not be overly complex. Once you have the system in place and have established standard practise, it can be smooth sailing for the most part. If problems do occur, then it may be up to you to assist in troubleshooting. Hopefully this document has provided you with a better understanding of how worksharing works, and what it requires. In this way you will be better prepared to manage future projects.

\*The notion of 'good project structure' could be worth an entire newsletter by itself – stay tuned!

---

Feel free to [contact us](#) if you have any questions or feedback relating to this newsletter.

Don't forget to check out our online [Knowledgebase](#).

---



[Click Here to Unsubscribe](#)  
[Click Here to Update your Profile](#)

---

C3 Consulting Solutions  
PO Box 2127, Spotswood VIC 3015 Australia  
info@c3consulting.com.au  
www.c3consulting.com.au