

## RELEASE NOTES: 3.1

This new release brings you Project Grouping, Sync with Central Traffic Monitor, Guardian Pause for users, advancements to the Loading Families from non-approved sources, and new rule-based protections for Hide Elements in View, Mirror Protection, and Family Override Protection

Project Grouping will allow Revit files to be grouped into Projects which will help admins keep track of Projects and eventually see overall analytics. The Sync with Central Traffic Monitor gives admins the ability to monitor the sync activity of users for each file and set up sync reminders. Updates to many of the current protections have been made to allow for rule-based configurations to automatically protect families from being mirrored, overridden, or hidden in view. The Loading from approved sources has also been updated to allow for the user experience to be customized for many different loading locations and scenarios.

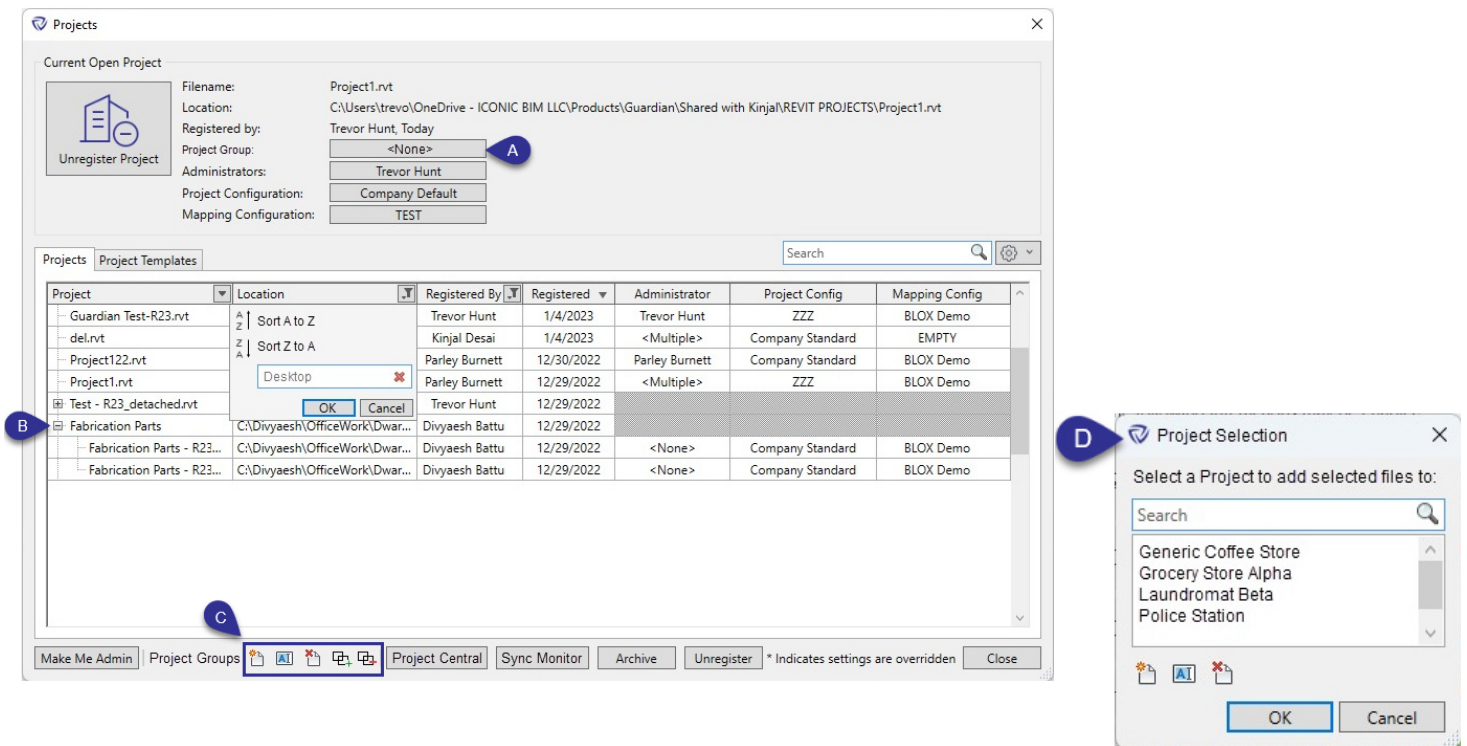
Before we detail everything that is included, we need to recognize the efforts of our development team. They have put forward an amazing effort, fueled by the passion of making your lives easier. If you like what you see here, please feel free to give us a mention to your friends and networks! It's how most people hear about us, and we like it that way.

We also want to thank YOU for your support! It truly motivates us to continue to make Revit better.

Thank you, Your Guardian Team

### New Feature Index:

- Page 2: Project Grouping
- Page 3: Sync with Central Traffic Monitor: Settings
- Page 4: Sync with Central Traffic Monitor: Monitoring
- Page 5: Pausing Guardian
- Page 6: Loading Families from non-approved sources
- Page 7: Hide Elements in View Protection
- Page 8: Mirror Protection Rules
- Page 9: Family Override Protection Rules
- Page 10: New Guardian Sync™ Property: Project Parameters
- Page 11: General Improvements
- Page 12: Bug Fixes



## Project Grouping

### Feature Description:

The addition of Project Grouping in Guardian allows administrators to group Revit files into actual Projects. The new structuring will allow firms to more easily keep track of all files within a Project and also see overall Project analytics.

The grouped Projects can be found in the Projects dialog. Registered Revit models will be able to be grouped into existing Projects or into newly created ones. Once grouped, the models will be shown under the Project in a tree view.

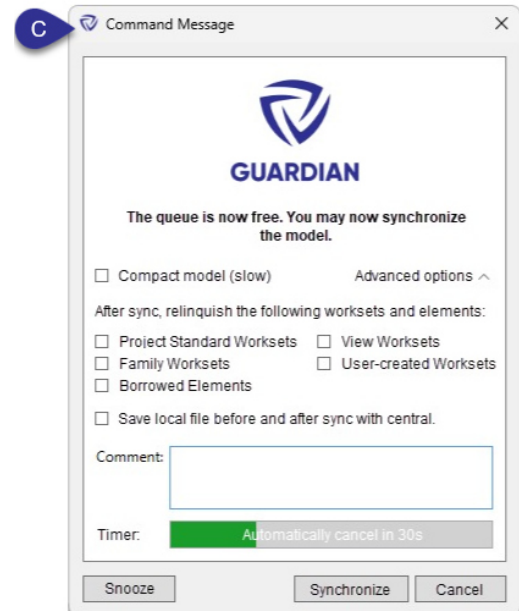
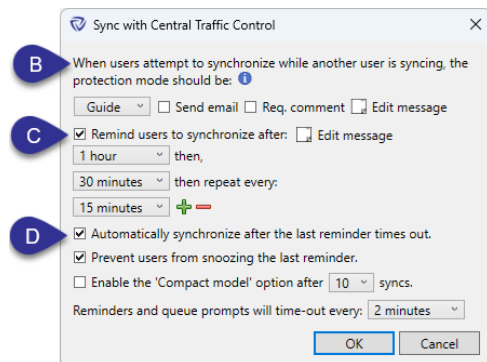
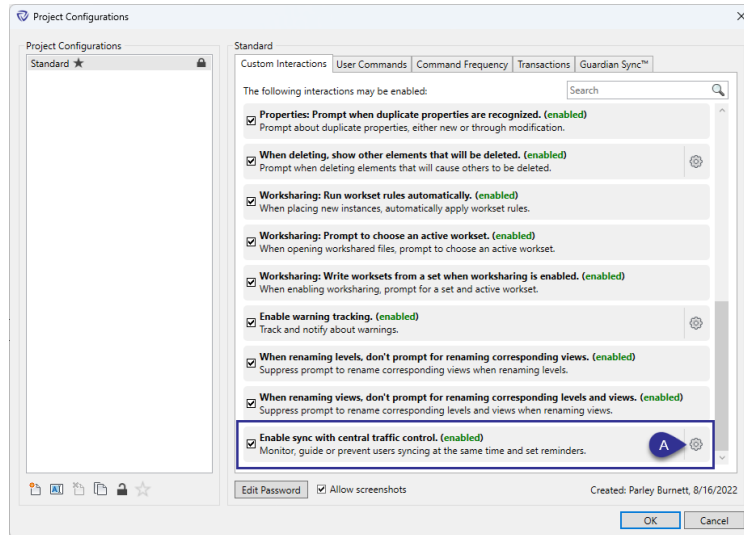
Additional columns can be displayed using the menu above the grid. Each column can be sorted and filtered individually.

**A:** The applied Project for the current active Revit model will be shown and can be modified. This will show alongside the applied configurations and admins.

**B:** Projects will be shown in the table as a Parent in a tree view with the associated models grouped within it. Administrators, Project Configurations, and Mapping Configurations cannot be applied to Projects and will be greyed out. The Registered By and Registered Date fields for each Project will reflect the date that the Project was registered and by which user.

**C:** Using the icons at the bottom of the dialog, Projects can be created, renamed, or deleted. Existing Registered models can be added to or removed from existing Projects. Projects can also be created, renamed, or deleted from within the Project Selection dialog.

**D:** Models can be added to Projects by selecting registered models (can be batch selected) within the Projects dialog and then clicking the **Add to Group** button. A Project can then be selected (or created) from the Project Selection dialog.



### Sync with Central Traffic Control: Settings

#### Feature Description:

The Sync with Central Traffic Control feature allows administrators to prevent sync conflicts and decrease down time. This is done in two major ways: by allowing admins to keep track of user sync behavior and to create tailored sync reminders. This feature also has protections that can prevent users from trying to sync a file at the same time as another user.

The Sync Traffic Monitor features can be enabled and configured in the Project Configurations.

**A:** The settings for the Sync Traffic Control can be configured within Project Configurations.

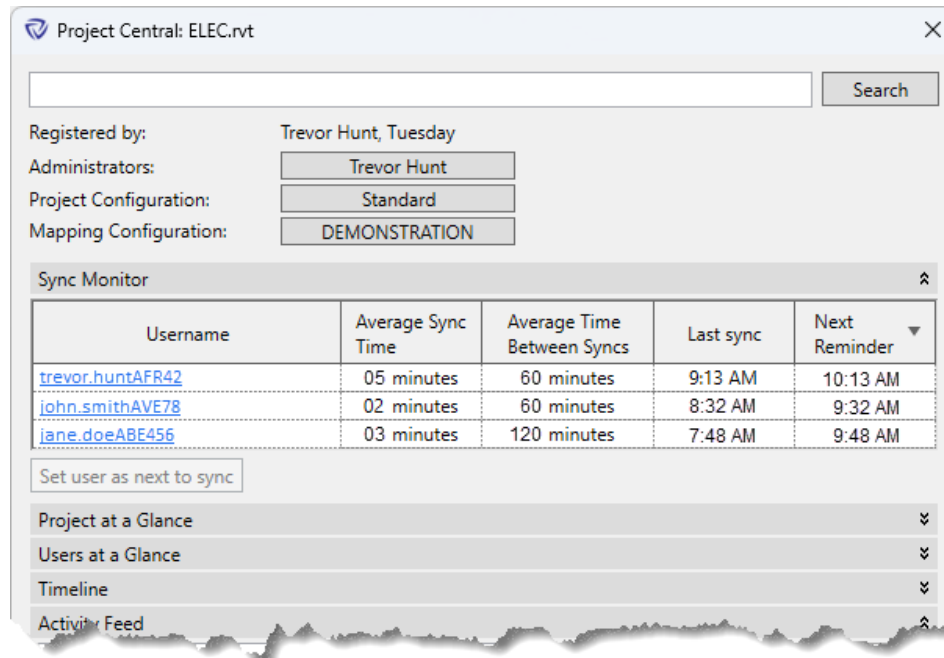
**B:** Guide or Prevent dialogs can be enabled for users when trying to synchronize a file while it is being synced by another user. When this occurs, the user trying to sync will be placed in a queue and will be notified when the file is free to be synced.

**C:** Sync reminders can be enabled and have custom messages created. The interval at which reminders are presented to the users can also be customized. Once a user snoozes the reminder, it will remind again at the next set time interval. The last time interval will repeat until the file is synchronized. Once synchronized, the reminder intervals will reset.

Sync reminders have the option to sync along with the relinquish options found in the Revit synchronize with central dialogs.

**D:** The sync reminders will time-out after a set period of time. Once timed-out, the reminder will either snooze or synchronize the file depending on the options set.

Compacting Revit models over time can help to reduce filesize and sync times. To help manage this, we have included an option to automatically enable the 'Compact Model' option on the sync reminders after a set number of syncs have occurred.

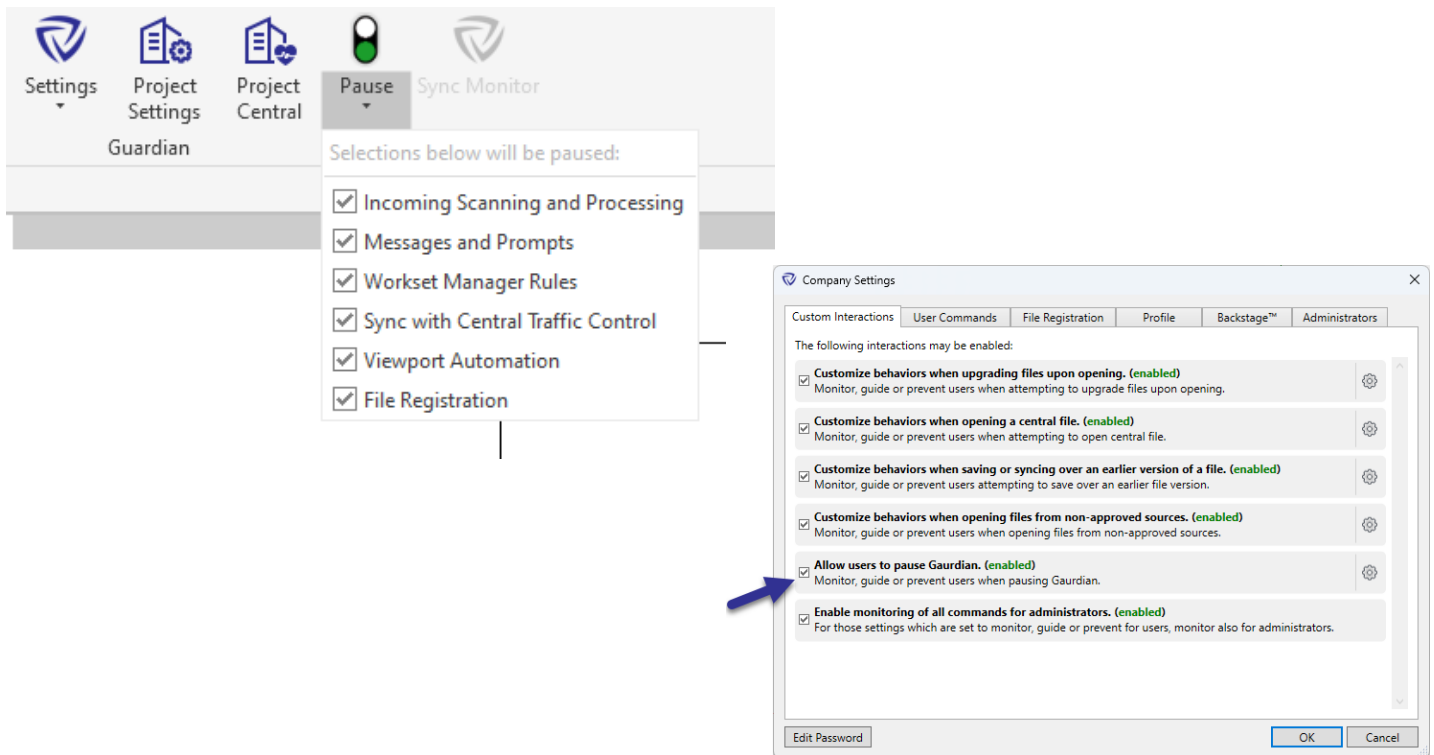


### Sync with Central Traffic Monitor: Monitoring

#### Feature Description:

Administrators can track user sync activity through Project Central. Within the Sync Monitor section, user data for sync times, times between syncs, and upcoming reminders can be seen. Within the Project Central, admins can also prompt users to sync by using the **Set user as next to sync** option. When used, that user will get a prompt to sync once the sync queue is clear.

Project Central will also be accessible for any non-open files through the Projects dialog. This will allow project managers the ability to monitor multiple files without the need to actually open them.



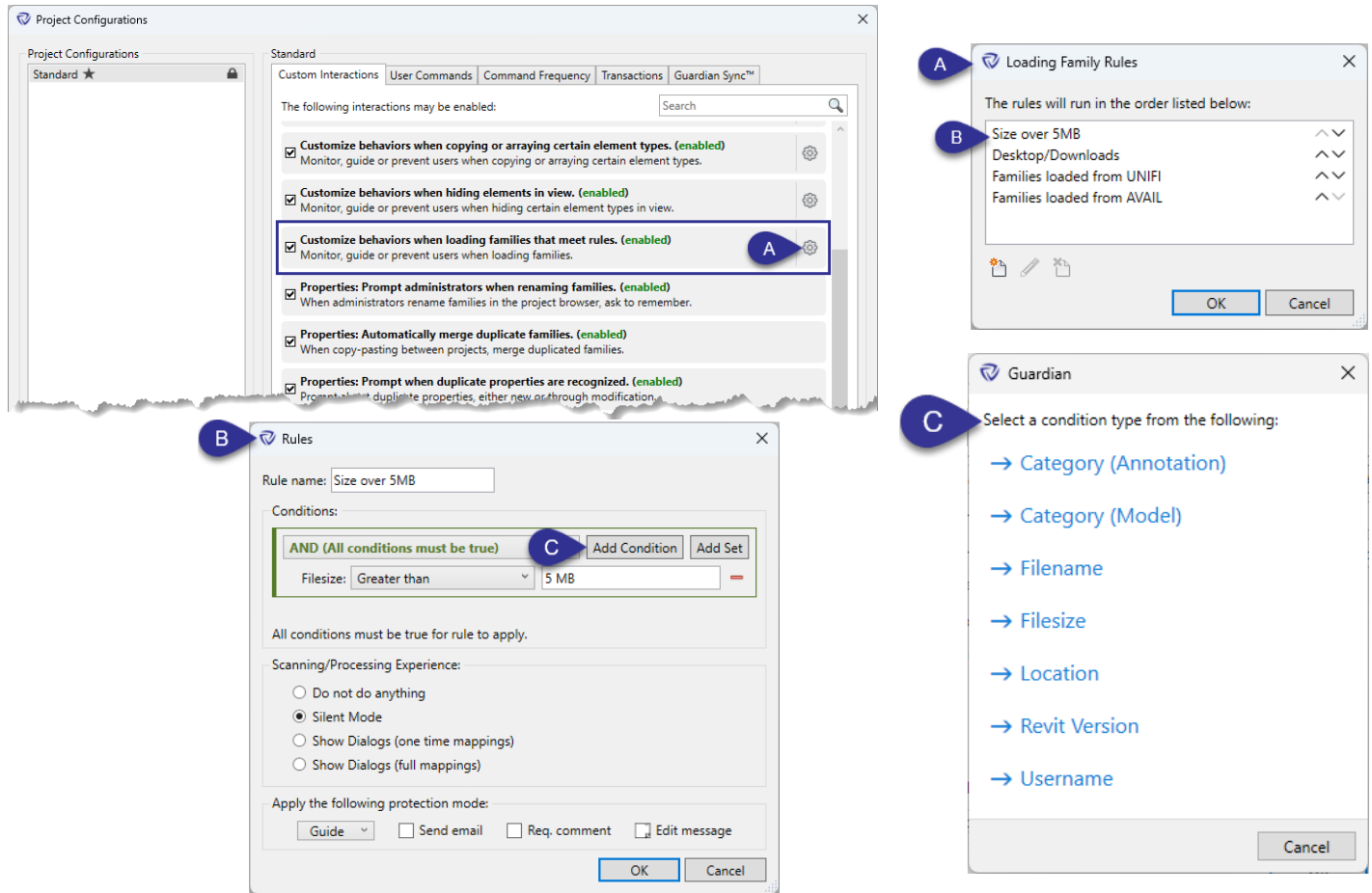
## Pausing Guardian

### Feature Description:

The Guardian pause feature has been enhanced so that specific areas and features of Guardian can be temporarily suspended. In addition, an option to allow end-users to pause Guardian is also now available. This can be enabled in the Company Settings.

In the dropdown menu for the Pause feature, admins (or users) can select features of Guardian to be affected. Once the pause feature is enabled (by clicking the pause button) any selected features will be suspended. The different features of Guardian that can be paused include:

- Incoming Scanning and Processing
  - The scanning and mapping of incoming properties will be suspended.
- Messages and Prompts
  - No Guide, Prevent, or other prompt dialogs from Guardian will appear.
- Workset Manager Rules
  - The automatic assignment of worksets upon placement of elements will be suspended.
- Sync with Central Traffic Control
  - Sync reminders and protections will be suspended.
- Viewport Automation
  - Automatic viewport type assignment upon placement of views will be suspended.
- File Registration
  - Automatic registration of files upon opening will be suspended.



### Loading from Non-Approved Sources

#### Feature Description:

With this release, advancements have been made to the loading families from non-approved sources feature. We have expanded on this to allow for customization of the user experience based on rules for different loading scenarios.

With this feature, multiple rules can be created to specifically tailor the experience for different loading paths, categories, or even for specific users.

**A:** The rules for the Loading Families can be configured within Project Configurations. The created rules will run in order from top to bottom until one meets the condition of the family being loaded. If multiple families are being loaded, they will be compared against the rules separately.

**B:** Within each rule, multiple AND and OR conditions can be created. There are a variety of conditions available to allow for the configuration of any scenario.

For each rule, the scanning/processing experience can be customized. This will determine the user experience for each of that families that are loaded into a file. If loading from an approved source, the experience can be set to 'Do not do anything' which will not perform any mappings.

When set to 'Silent Mode' the scanning and processing will occur in background (typical end-user experience).

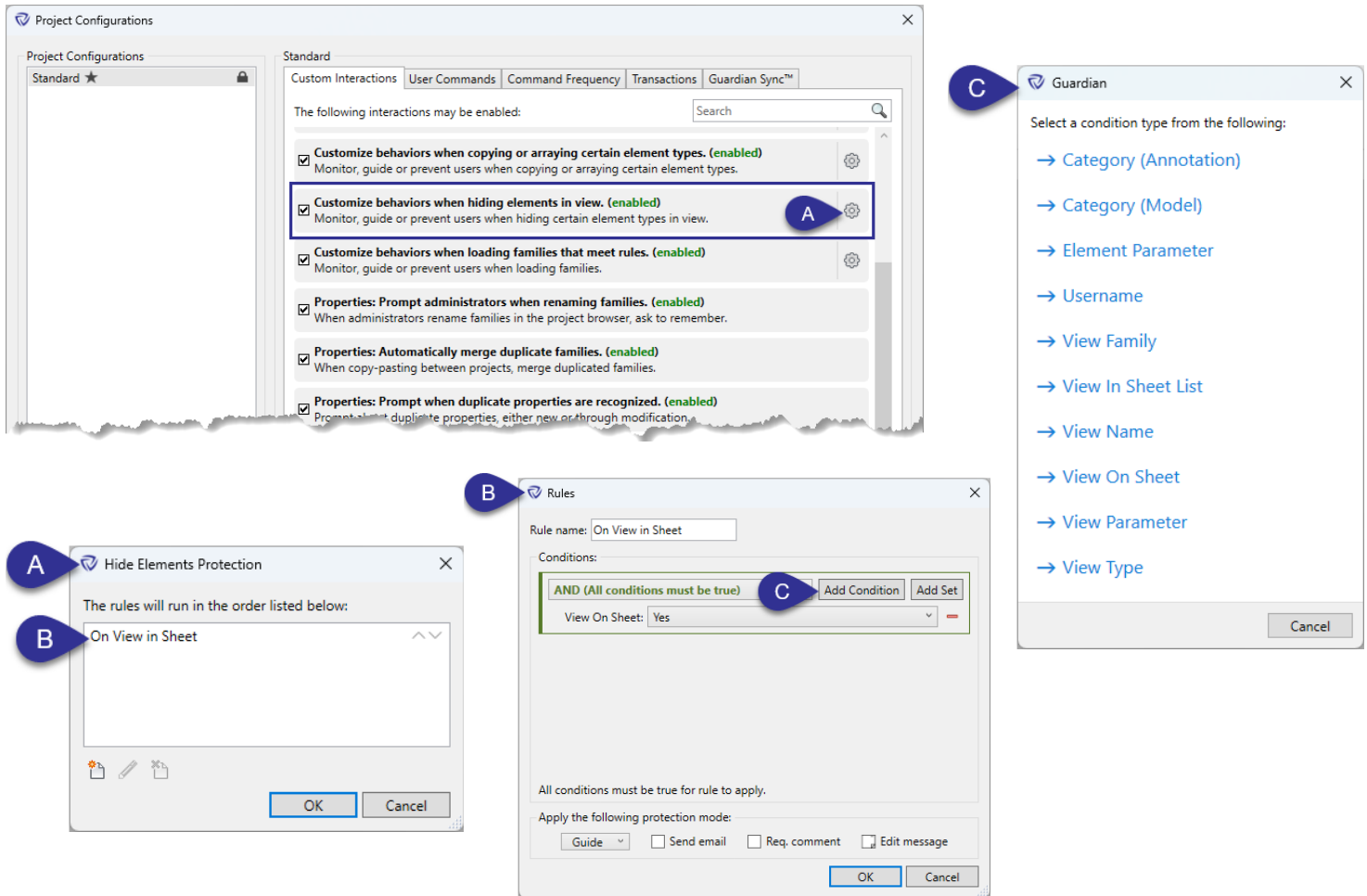
The 'Show dialogs' options will allow users to view the incoming properties and make mappings of their own.

The Protection Mode can also be set if the rule is pertaining to a restricted source.

**C:** There are many different conditions that can be used for the rules. These include Category, Filename, Filesize, Locations, and Username.

Most of the conditions are related to the family itself that is being loaded with the exception of the Username condition. The Username condition can be used to make the rule be specific to (or exclude) specific users.





### Hide Elements in View

#### Feature Description:

A new protection has been added to better apply protection against users hiding elements in view. We have seen that a blanket solution for this isn't always the best approach so we have added a system of rules so that the protection can be customized based on your specific needs.

**A:** The rules for the Hiding Elements in View can be configured within Project Configurations. The created rules will run in order from top to bottom until one meets the condition of the element being hidden. If multiple elements are being hidden, they will be compared against the rules separately.

**B:** Within each rule, multiple AND and OR conditions can be created. There are a variety of conditions available to allow for the configuration of any scenario.

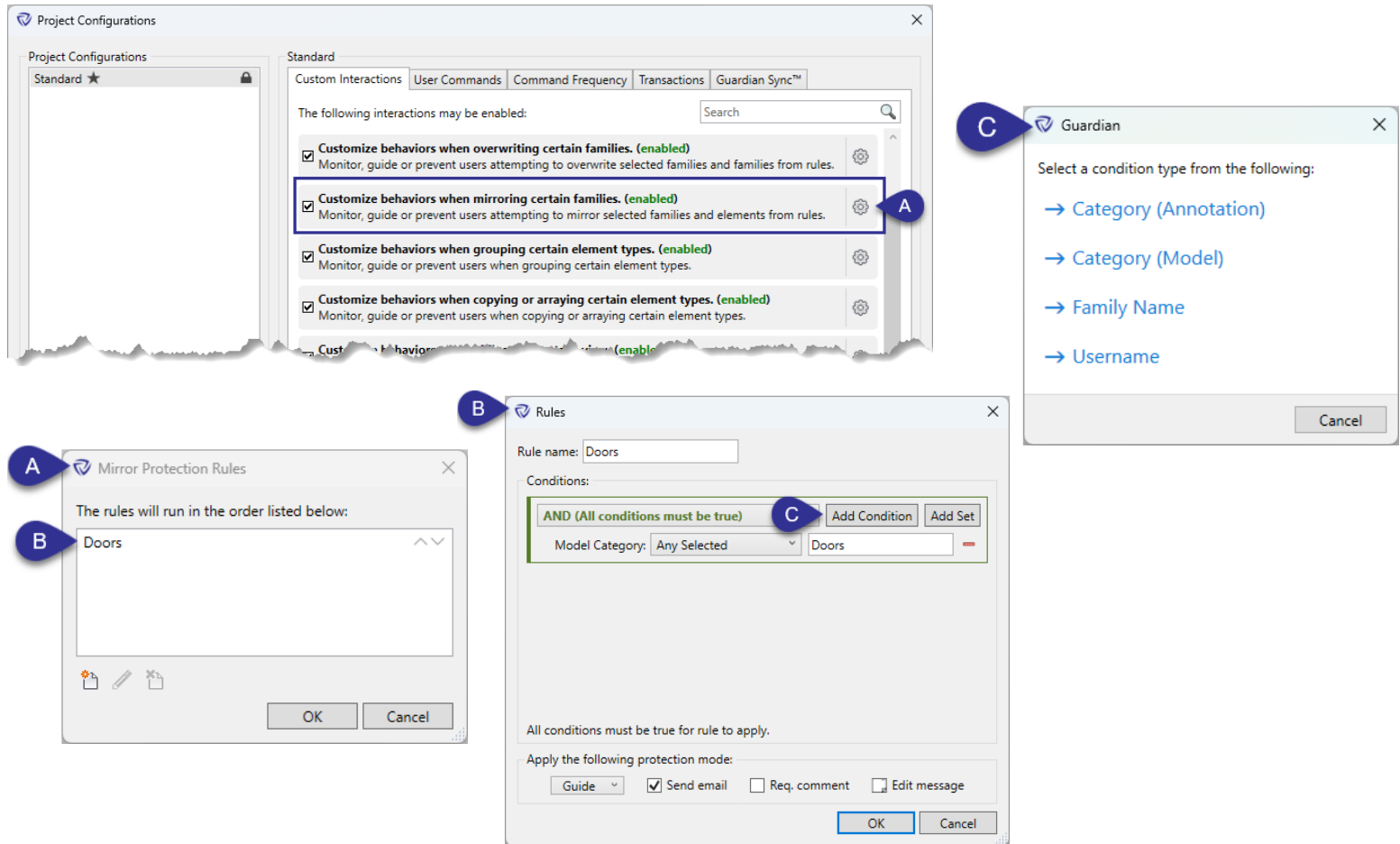
The Protection Mode can be customized for each rule. More strict protections can be applied for more important elements and less important ones can simply be monitored.

**C:** There are many different conditions that can be used for the rules. These include Category, Element Parameter, Username, View Family, View In Sheet List, View Name, View On Sheet, View Parameter, and View Type.

The Category and Element Parameter conditions are pertinent to the specific elements trying to be hidden.

The Username condition can be used to make the rule be applied specific users.

The View conditions will apply the protection to any elements trying to be hidden in a view that matches the conditions. In the example shown 'On View in Sheet', this will protect all elements from being hidden in a view where that view is currently being used on a sheet.



## Mirror Protection Rules

### Feature Description:

The Mirror Protection feature has been updated to allow for rules to be created to automatically protect certain elements from being mirrored. Specific families can still be protected by selecting them in the Mirror Protection dialog.

**A:** The rules for the Mirror Protection can be configured within Project Configurations. The created rules will run in order from top to bottom until one meets the condition of the element being mirrored. If multiple elements are being mirrored, they will be compared against the rules separately.

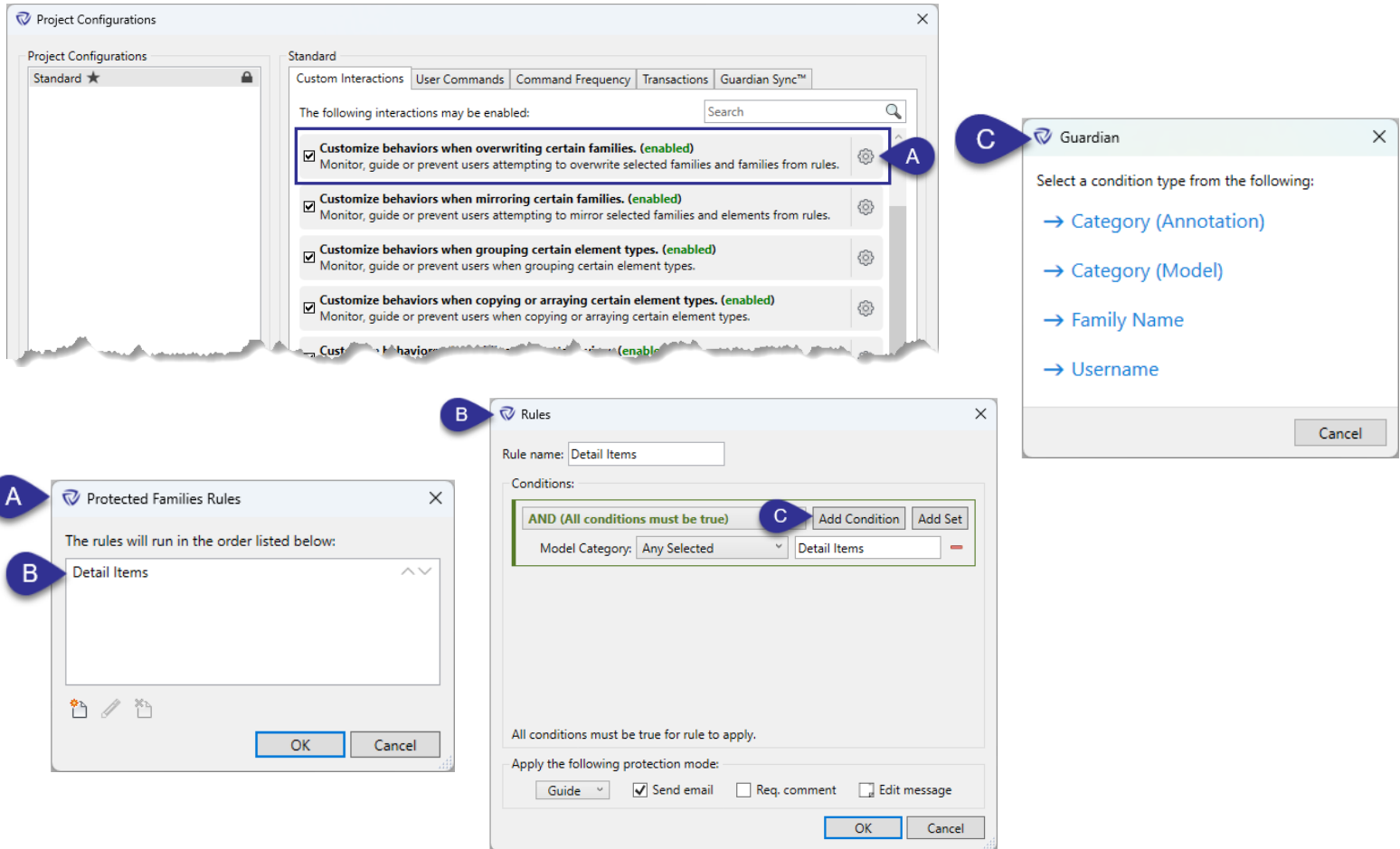
**B:** Within each rule, multiple AND and OR conditions can be created. There are a variety of conditions available to allow for the configuration of any scenario.

The Protection Mode can be customized for each rule. More strict protections can be applied for more important elements and less important ones can simply be monitored.

**C:** There are many different conditions that can be used for the rules. These include Category, Family Name, and Username

Most of the conditions are related to the family itself that is being mirrored with the exception of the Username condition. The Username condition can be used to make the rule be applied to specific users.





## Family Override Protection Rules

### Feature Description:

The Family Override Protection feature has been updated to allow for rules to be created to automatically protect certain elements from being overridden. Specific families can still be protected by selecting them in the Family Protection dialog.

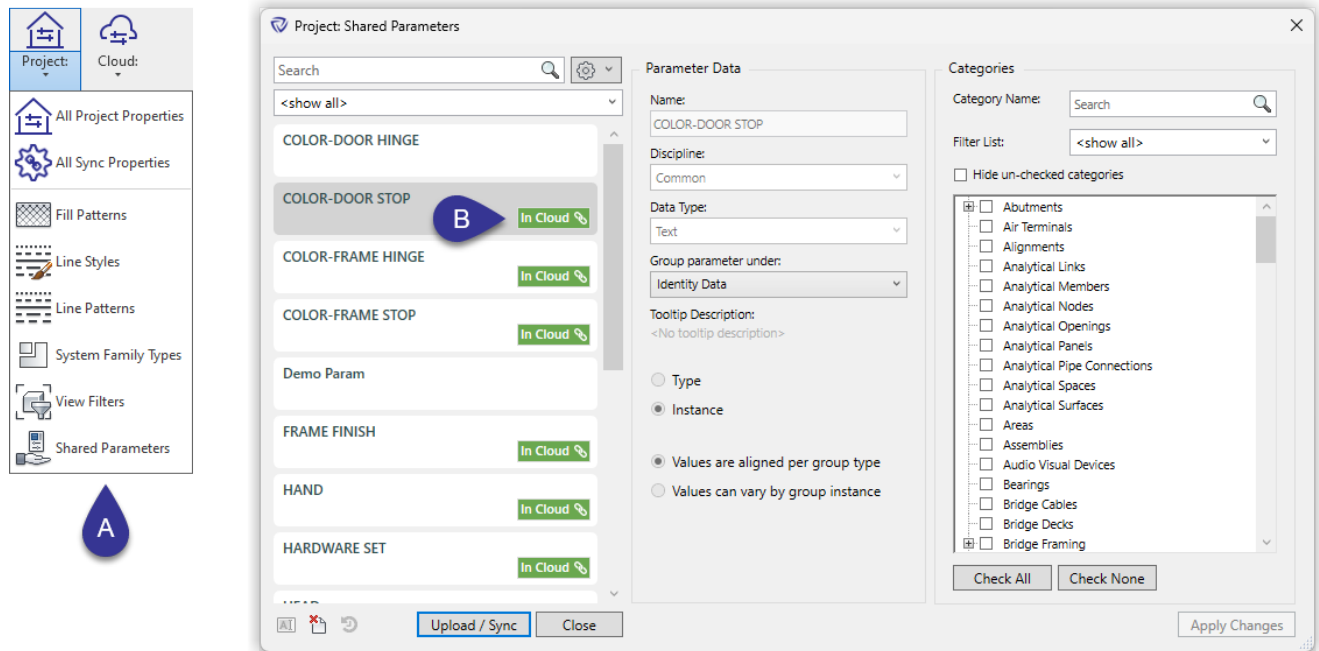
**A:** The rules for the Family Override Protection can be configured within Project Configurations. The created rules will run in order from top to bottom until one meets the condition of the element being overridden. If multiple elements are being overridden, they will be compared against the rules separately.

**B:** Within each rule, multiple AND and OR conditions can be created. There are a variety of conditions available to allow for the configuration of any scenario.

The Protection Mode can be customized for each rule. More strict protections can be applied for more important elements and less important ones can simply be monitored.

**C:** There are many different conditions that can be used for the rules. These include Category, Family Name, and Username

Most of the conditions are related to the family itself that is being mirrored with the exception of the Username condition. The Username condition can be used to make the rule be specific to (or exclude) specific users.



### **New Guardian Sync™ Property: Project Parameters**

#### **Feature Description:**

You can now identify your standard project parameters with Guardian Sync™! You'll also be able to keep parameters consistent across projects and access them in files where the parameter doesn't exist yet.

As with all Guardian Sync™ properties, these maintain their relationships with other Sync™ properties. For example, if you upload a View Filter which uses a project parameter, that parameter will be uploaded as an independent property and these relationships are maintained and visible by scanning for usage. This will be increasingly important as we begin to support even more properties and types with Guardian Sync™

**A:** Project Parameters can be viewed and uploaded by using the 'Project' menu and downloaded from the 'Cloud' menu. We currently only support Project Parameters which are based on Shared Parameters. Non-Shared Parameter based parameters are not supported due to limitations with the Revit API.

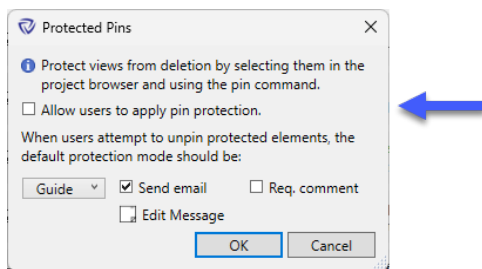
**B:** Once uploaded, Guardian Sync™ appear as shown. You can multi-select properties to batch upload, fix sync relationship, etc.

You may also customize the category assignment and group in the right side of the dialog. These changes can be applied to the cloud/project counter parts by clicking the green tag.

### General Improvements:

Check out some of the more notable general improvements we've made to Guardian!

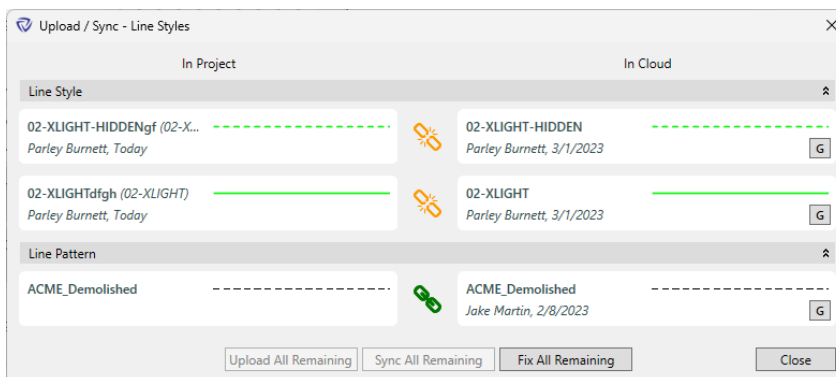
- The Projects dialog has been updated to allow for more advanced filtering and sorting for the different columns.
- New columns will be available to be added/swapped out for the Projects dialog.
- The Project Central will be accessible for registered files through the Projects dialog. (coming during beta)
- Automatic registration rules can be applied when worksharing is enabled (for files not yet registered).
- **Pin protection can be applied to Views, Legends, Sheets, and even Families in the Project Browser.**
- **Users can apply pin protection if enabled through the Pin Protection feature.**



- Track activities of administrators in Monitor mode (Company Settings):

☒ **Enable monitoring of all commands for administrators. (enabled)**  
For those settings which are set to monitor, guide or prevent for users, monitor also for administrators.

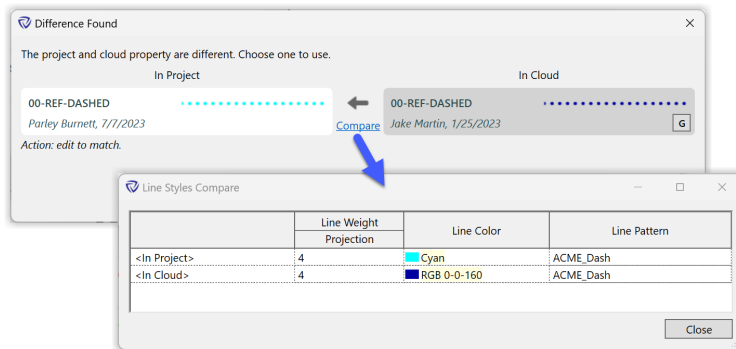
- Screenshot images in Project Central activity logs can be zoomed and panned.
- Screenshot images in Project Central activity logs will automatically be opened (by default image application) when downloaded.
- Missing links will be shown in Project Central: Project at a Glance.
- Support added for Revit 2024
- Added 'Fix All Remaining' button to all upload/download dialogs:



- Normal users can now 'Fix Sync Relationships' for properties in projects. This will push from cloud.
- New command added to User Commands: Save As Template

## General Improvements (continued):

- When 'fixing sync relationship' between project and cloud, you can now compare the two versions and view their differences.



## Bug Fixes:

- Duct Insulation, Duct Linings, and Pipe Insulation will not be included in the Delete Notifications when deleting Duct or Pipe runs with Insulation (or Linings) applied.
- Workset Manager: Only Allow rules will not be applied to elements that are set to workset of views; such as callouts.
- Issue resolved concerning mapping properties of the same name but different casing.
- Issue resolved with file registration rules using the filename condition not working for detached files.
- Bug fixed where files were not registering automatically when no Mapping Configuration is applied in registration rule.
- Bug fixed where Room Separation lines and Area Boundary lines weren't being automatically assigned to worksets upon placement.
- Error resolved when enabling worksharing and having default worksets replaced by ones that have the same name but different casing.
- Resolved some issues with mapping Shared Parameters.