

# D.TO Platform User Manual

## 01 Introduction

Welcome to D.TO, a platform designed to streamline architectural workflows, especially during the Design Development (DD) and Construction Documentation (CD) phases. D.TO supports architects with tools for managing and indexing intellectual assets, assisting in product selection, and providing detailed construction guidance—all seamlessly integrated into your BIM environment.

Tutorial Video 1: [https://youtu.be/m3lVzFWsydg?si=r4Z7RZCGiBZuJk\\_S](https://youtu.be/m3lVzFWsydg?si=r4Z7RZCGiBZuJk_S)

## 02 Getting Started

### Creating a D.TO Account:

- Go to [D.TO's website](#) and click on the "Sign In" button.
- Then click on the link "Sign up now".
- Input your email address and send the Verification Code. Check your email for a verification code and enter it.
- Create a password and fill in the required fields to create your account.
- Once completed, you can log in to the Web platform using your credentials.

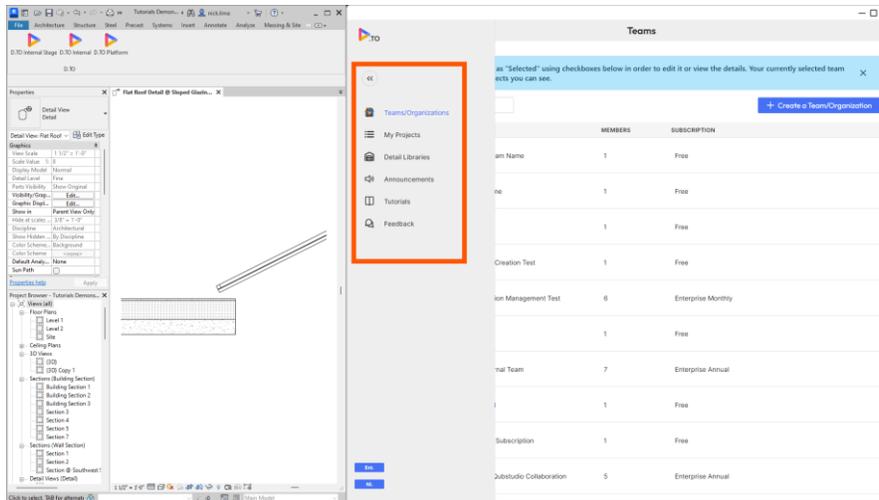
### Installation and Launch of the Revit Add-in:

- Visit [D.TO's website](#) download the Revit Add-in installer.
- **Close Revit Applications**
- Run the downloaded installer and follow the instructions to complete the installation.
- **Launch D.TO in Revit:**
  1. Open Revit and select "Always Load" when prompted to load D.TO's application.
  2. Access the D.TO platform from the D.TO tab on the Revit Ribbon.

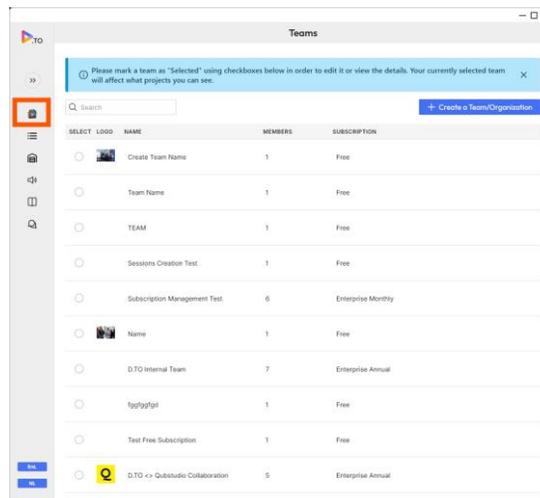
## 03 User Interface Overview

The platform's user interface is designed for simplicity and efficiency. You can dock D.TO side by side with Revit while keeping everything connected and accessible as you work.

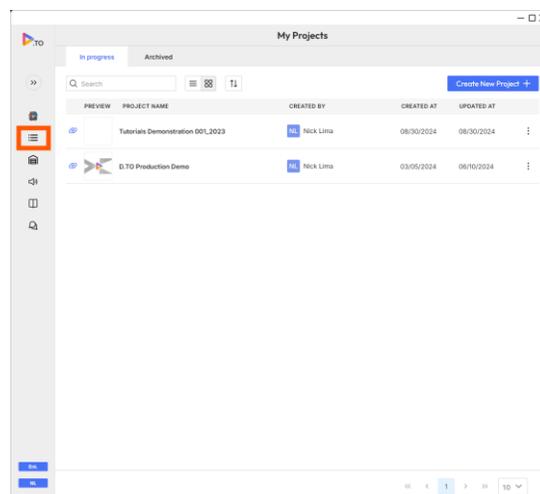
On the left, you'll find a side ribbon that gives you quick access to key areas within D.TO:



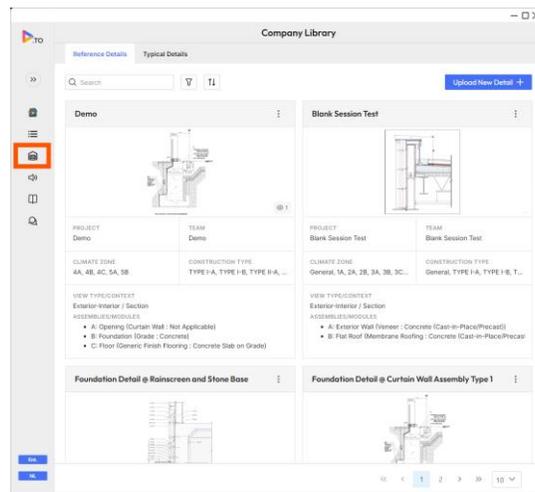
- **Teams/Organizations:** Manage your company’s subscriptions, invite team members, and assign licenses.



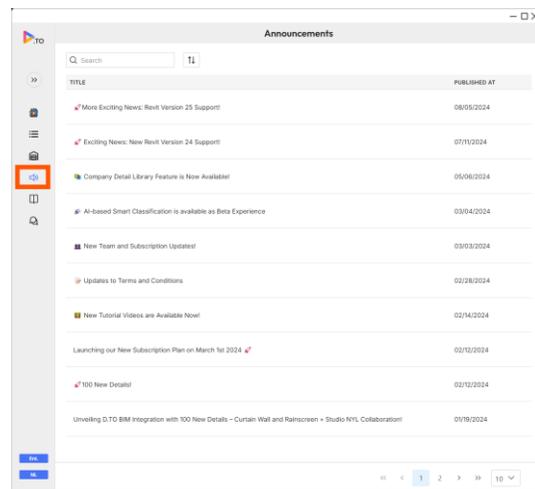
- **My Projects:** Oversee all your D.TO projects, whether they’re active or archived.



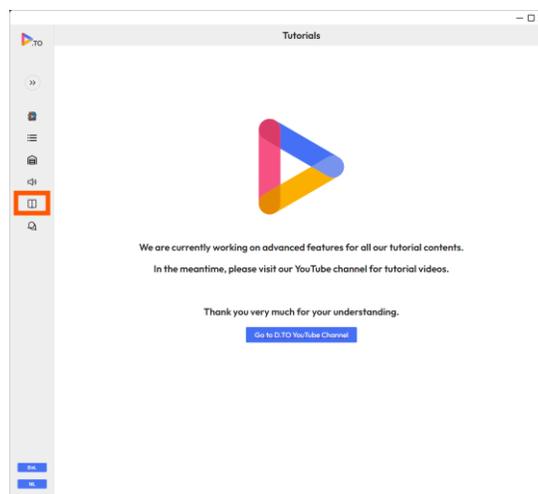
- **Detail Libraries:** Upload and manage your firm's details and company library content.



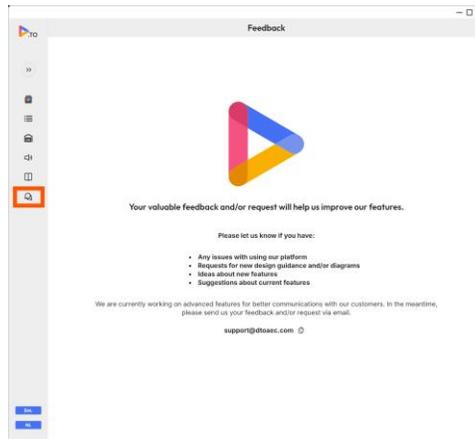
- **Announcements:** Stay informed with updates, such as new features or content releases.



- **Tutorials:** Link to D.TO YouTube channel for video guides to help you navigate the platform.



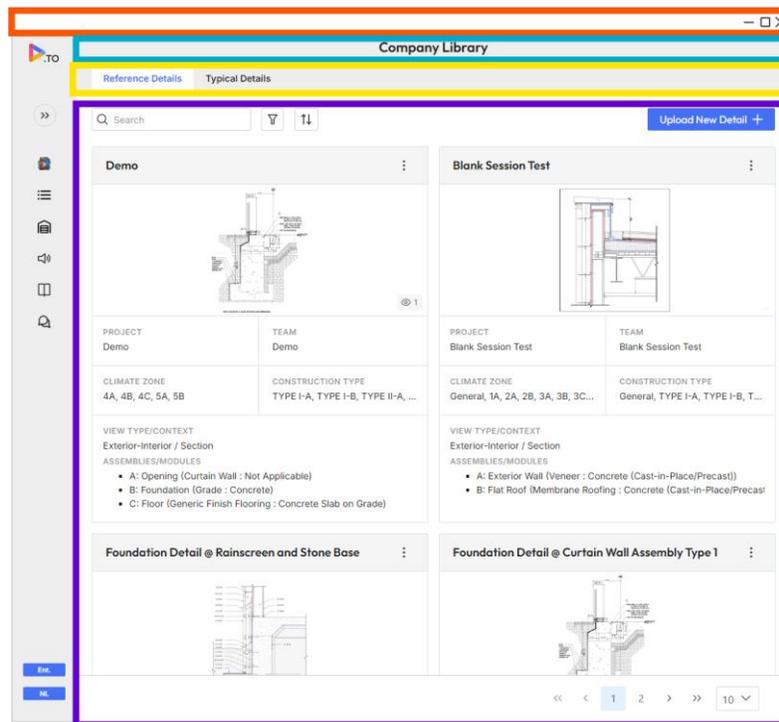
- **Feedback:** Share your requests for new features or content—our development roadmap is shaped by what the industry needs most during DD and CD phases.



## Common Elements

There are some interface items that remain constant between these tabs.

- **Application Bar:** Fixed at the top across all levels.
- **Title Bar:** Displays the current level's title, Revit link status, edit menu, and previous screen arrow.
- **Menu Ribbon:** Contains tabs for various subsections of the current level.
- **Body:** Displays the content relevant to the current level or sub-level.



Tutorial Video 3: <https://youtu.be/skCqXw4q8Cs?si=UszsX2n9Na3gR1Ib>

## 04 Navigating the D.TO Platform

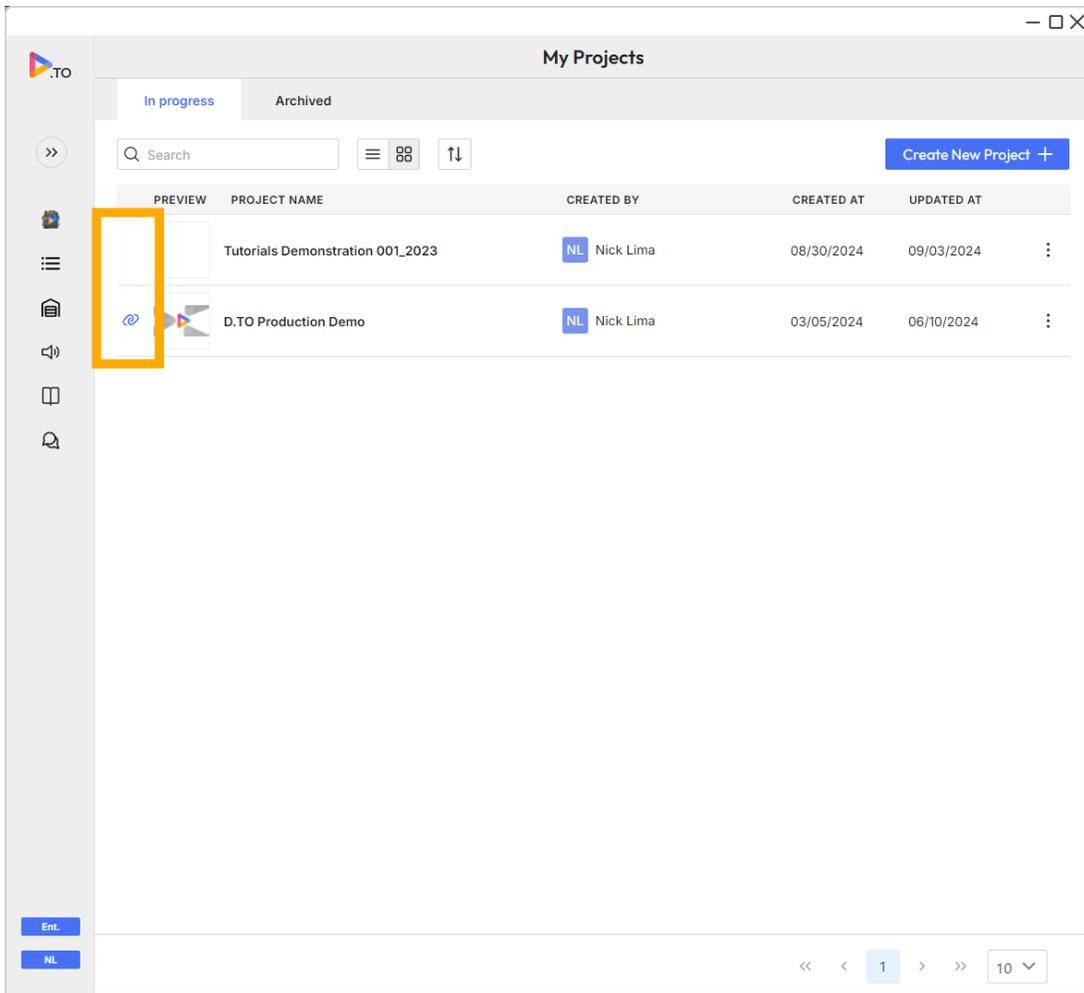
### My Projects Interface

The My Projects interface is used for creating and managing D.TO projects.

- **Project Management:** Organize and manage in-progress and archived D.TO projects.
- **Search and Sorting:** Search projects by keyword, sort projects, and view them in list or card formats.
- **Project Actions:** Create new D.TO projects, and edit, archive, or delete existing projects.
- **Archiving:** Archived projects can be viewed in the archived menu tab and unarchived if needed. Deletion will remove projects permanently.

### Revit Project to D.TO Link Status

- **Chain Link Symbol:** Indicates whether the open Revit project is linked to the D.TO project.
  1. **Blue:** Linked
  2. **Not Visible:** Not linked



The screenshot displays the 'My Projects' interface. At the top, there are tabs for 'In progress' and 'Archived'. Below the tabs is a search bar and a 'Create New Project +' button. The main area contains a table with the following columns: PREVIEW, PROJECT NAME, CREATED BY, CREATED AT, and UPDATED AT. The table lists two projects:

PREVIEW	PROJECT NAME	CREATED BY	CREATED AT	UPDATED AT
	Tutorials Demonstration 001_2023	NL Nick Lima	08/30/2024	09/03/2024
	D.TO Production Demo	NL Nick Lima	03/05/2024	06/10/2024

The blue chain link icon in the preview column of the 'D.TO Production Demo' project is highlighted with an orange box, indicating it is linked to the D.TO project. The interface also includes a sidebar with navigation icons and a footer with user information (Ent., NL) and pagination controls (1 of 10).

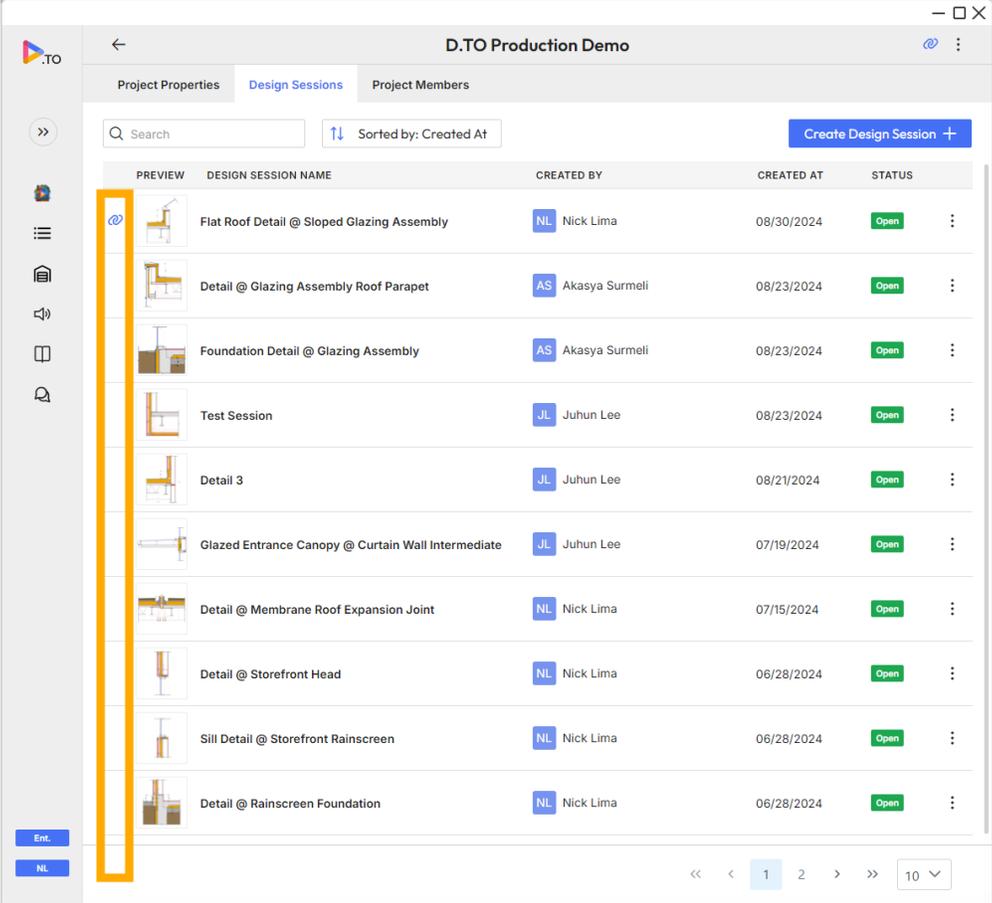
## Project Interface

Click on any project from the My Projects list to access the Project interface.

- **Title Bar:** Displays the project name, Revit link status, edit menu, and previous screen arrow.
- **Menu Ribbon:** Tabs for design sessions, project properties and project members.
- **Design Sessions:** Represent D.TO's workflow and correspond to Revit detail callouts.
- **Search and Sorting:** Search design sessions by keyword, sort them, and create new design sessions.
- **Session Actions:** Edit, archive, or delete design sessions.
- **Project Members:** Invite team/organization members to join your project and manage permissions.

## Revit View to D.TO Design Session Link Status

- **Chain Link Symbol:** Indicates the link status between the Revit project and D.TO project.
- **Blue:** Linked
- **Red:** Not linked
- **Design Session Link Status:** Indicates the link between Revit callout views and D.TO design sessions.



The screenshot displays the 'D.TO Production Demo' interface. At the top, there are tabs for 'Project Properties', 'Design Sessions', and 'Project Members'. Below the tabs is a search bar and a 'Sorted by: Created At' dropdown. A 'Create Design Session +' button is located on the right. The main content is a table with the following columns: 'PREVIEW', 'DESIGN SESSION NAME', 'CREATED BY', 'CREATED AT', and 'STATUS'. A yellow box highlights the chain link symbols in the 'PREVIEW' column. The table contains 11 rows of design sessions, each with a preview image, name, creator, date, and status.

PREVIEW	DESIGN SESSION NAME	CREATED BY	CREATED AT	STATUS
 	Flat Roof Detail @ Sloped Glazing Assembly	NL Nick Lima	08/30/2024	Open
 	Detail @ Glazing Assembly Roof Parapet	AS Akasya Surmeli	08/23/2024	Open
 	Foundation Detail @ Glazing Assembly	AS Akasya Surmeli	08/23/2024	Open
 	Test Session	JL Juhun Lee	08/23/2024	Open
 	Detail 3	JL Juhun Lee	08/21/2024	Open
 	Glazed Entrance Canopy @ Curtain Wall Intermediate	JL Juhun Lee	07/19/2024	Open
 	Detail @ Membrane Roof Expansion Joint	NL Nick Lima	07/15/2024	Open
 	Detail @ Storefront Head	NL Nick Lima	06/28/2024	Open
 	Sill Detail @ Storefront Rainscreen	NL Nick Lima	06/28/2024	Open
 	Detail @ Rainscreen Foundation	NL Nick Lima	06/28/2024	Open

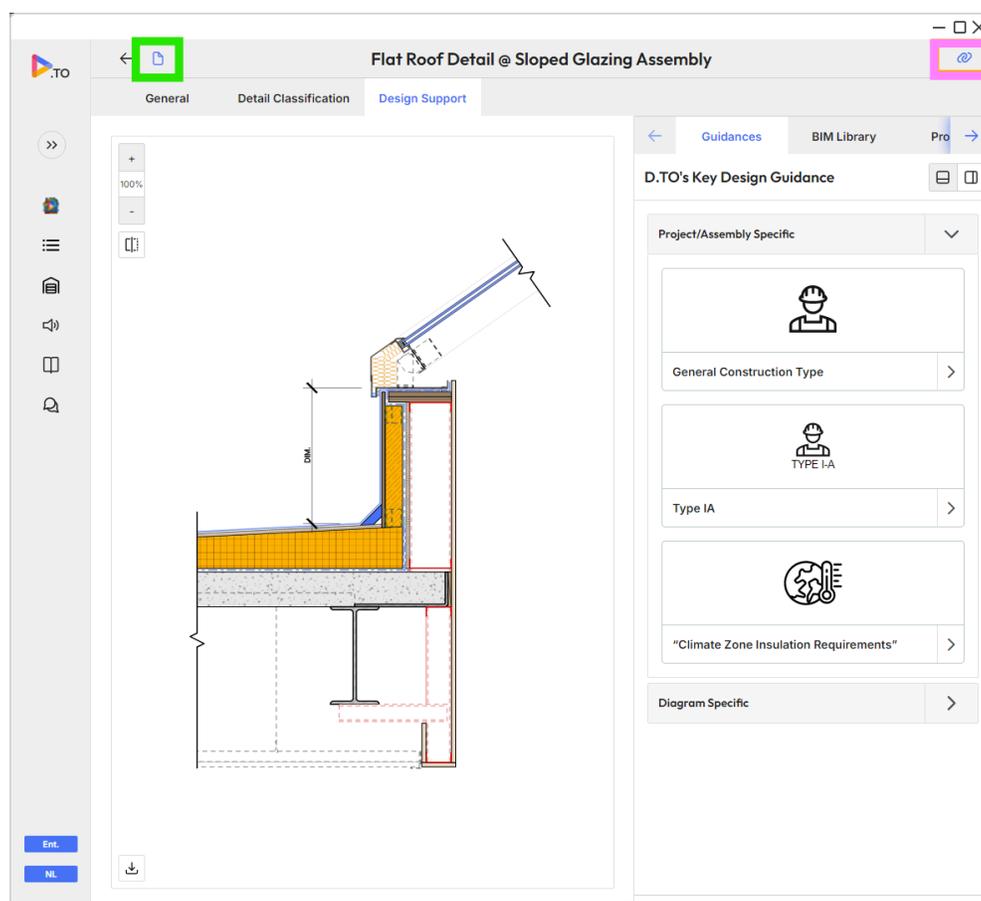
## Design Session Interface

Click on any design session in your project to enter the Design Session interface.

- **Title Bar:** Displays the view name, Revit view link status, edit menu, and previous screen arrow.
- **Menu Ribbon:** Tabs for general information, design guidance, and detail classification.
- **Design Guidance:** Interactive detail diagrams and design guidance cards coordinated with the diagram.
- **Session Actions:** Edit or delete design sessions.

## Revit Design Session Link

- **Chain Link Symbol:** Indicates the link status between the Revit view and D.TO design session.
  1. **Blue:** Linked
  2. **Red:** Not linked
- **Paper Symbol:** Can be used to “fetch” or open the Revit callout view without navigating the Revit project browser to find your view.



Tutorial Video 4: <https://youtu.be/skCqXw4q8Cs?si=UszsX2n9Na3gR1Ib>

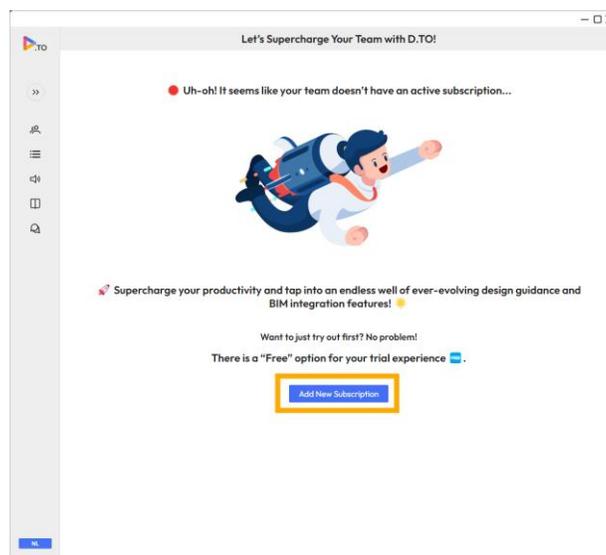
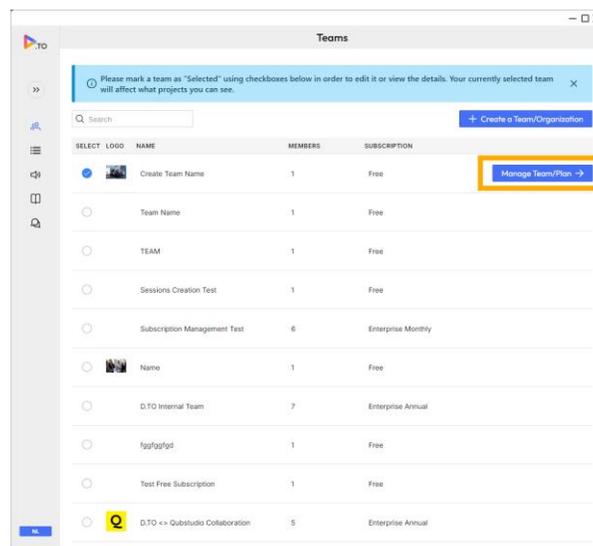
## 05 Team Organization and Subscription Management

### Creating a New Team/Organization

- Select +Create a Team/Organization
- Enter your team or organization's name.
- Specify the industry and provide an optional description.
- Upload images for the thumbnail and logo.
- Complete the address fields.
- Click "Create a Team/Organization" to set up your team.

### Adding and Managing Subscriptions

1. Navigate to the "Teams List" and select the team you want to add subscriptions
2. Once selected, click "Manage Team/Plan and Add New Subscription"



3. Select the monthly or annual option at the top.
4. Choose a subscription plan: Free Trial, Essentials, or Premium
5. Choose the quantity and enter promotional code if available.
6. Enter in Quantity, Select payment method and fill out required fields.
7. Complete the purchase by clicking "Subscribe."

## Managing Team Plan

- **Access:**
  1. Ensure your team is selected.
  2. Click "Manage Team Plan."
- **View and Edit Information:**
  1. View team and subscription details in the "Properties" tab.
  2. Click the three dots in the top right-hand corner to edit.

## Inviting and Managing Users

- **Invite Users:**
  1. Switch to the "Users" tab.
  2. Enter email addresses and click "Invite Users +".
- **Assign Seats:**
  1. Ensure users have accepted invitations and have a D.TO account.
  2. Assign seats to users, including yourself as the owner of the team.
- **Manage Invitations:**
  1. Use envelope and trash can icons to send reminders or remove users.
- **Reallocate Seats:**
  1. Unassign a user to free up a seat.
  2. Assign the seat to another team member.
  3. Assigned users can access "My Projects", create D.TO projects and access "Detail Library".

Tutorial Video 5: <https://youtu.be/bxbeZGdyQ9E?si=DHMCgQ3vftqUmS-x>

## 06 Creating a New D.TO Project

### Checking Project Linkage

- **Verify Revit Project Linkage:**
  1. Open the My Projects interface.
  2. Look for the chain link symbol next to your Revit project. This indicates an existing linkage.
  3. If no chain link symbol is visible, you either have to open the linked project or create a new D.TO project.

## Creating a New D.TO Project

- **Start a New Project:**
  1. Click the “**Create New Project**” button.
  2. Enter your project's properties in the provided fields.
- **Linking Revit Projects:**
  1. Click the **Link Revit Project** button.
  2. Select an open Revit project from the drop-down menu.
  3. To link additional Revit projects, repeat these steps.
  4. You have the option to overwrite or retain information from the previously linked project.
- **Unlinking Revit Projects:**
  1. To unlink a Revit project from your D.TO project use the trash can next to the linked model to remove it.

The screenshot displays the 'D.TO Production Demo' interface. At the top, there are navigation tabs for 'Project Properties', 'Design Sessions', and 'Project Members'. The 'Project Properties' tab is active, showing a 'Linked Revit Project Info' section with a 'Link Revit Project' button. Below this is a table with two columns: 'REVIT PROJECT' (Tutorials Demonstration 001\_2023) and 'REVIT FILE VERSION' (Autodesk Revit 2023). The 'General Information' section includes a 'PROJECT NAME' field (D.TO Production Demo) and a 'PROJECT THUMBNAIL (OPTIONAL)' section with an 'Upload image' button. The 'Project Classification' section features dropdown menus for 'CLIMATE ZONE' (5A), 'CONSTRUCTION TYPE' (TYPE I-A), and 'USE & OCCUPANCY' (E Educational). The 'Additional Info' section has a toggle switch for 'Share additional info with manufacturers' and fields for 'PROJECT NUMBER (OPTIONAL)' (2023-008) and 'DESCRIPTION (OPTIONAL)'. At the bottom, there are buttons for 'Ent.', 'NL', 'Cancel', and 'Save Changes'.

**D.TO Production Demo**

Project Properties | Design Sessions | Project Members

**Linked Revit Project Info** ⓘ

The file version and URL are updated automatically after you've relinked the Revit project  
Requires Revit for linking

Link Revit Project

REVIT PROJECT	REVIT FILE VERSION
Tutorials Demonstration 001_2023	Autodesk Revit 2023

**General Information**

PROJECT NAME  
D.TO Production Demo

PROJECT THUMBNAIL (OPTIONAL)  
Upload image

It is recommended that you choose an image that showcases your project's main idea.

**Project Classification**

CLIMATE ZONE: 5A  
CONSTRUCTION TYPE: TYPE I-A  
USE & OCCUPANCY: E Educational

**Additional Info** ⓘ

Share additional info with manufacturers

PROJECT NUMBER (OPTIONAL): 2023-008

DESCRIPTION (OPTIONAL)

Ent. NL Cancel Save Changes

## Project Properties

- **General Information:**
  1. Name your D.TO project.
  2. Upload a thumbnail image for display on the My Projects list.
- **Project Classification:**
  1. Input details such as climate zone, construction type, and use and occupancy.
  2. These parameters help D.TO provide tailored guidance for your project.
- **Additional Info (Optional):**
  1. The project number and client name are pre-populated from your Revit Project Information parameters.
- **Finalize Project Creation:**
  1. Click **Create a New Project** to add it to the My Projects list.
  2. The chain link symbol will appear, indicating successful linkage.

## Reviewing and Editing Project Properties

- **Accessing Project Details:**
  1. Click on the new project card in the My Projects list.
  2. Review and edit project properties by selecting the edit project button.
- **Starting Design Sessions:**
  1. Navigate to the **Design Session** tab to create your project's design sessions.

Tutorial Video 6: [https://youtu.be/5aAniyN\\_NFQ?si=HccSiysYth2zPo8p](https://youtu.be/5aAniyN_NFQ?si=HccSiysYth2zPo8p)

## 07 Creating a New D.TO Design Session

### Overview

Design sessions in D.TO are integral to the workflow, corresponding directly with Revit detail callouts, both 3D and referenced drafting views. Before initiating design sessions, it is recommended that you add Revit callouts for all plan and section details. Each Revit callout will be linked to a specific D.TO Design Session throughout the project's lifecycle.

### Creating a New Design Session

- **Open the D.TO Project**
  1. Open the D.TO project that is linked to your Revit project.
  2. Navigate to the Design Sessions tab.
- **Open a Callout View**
  1. Access a callout view within your Revit project.
- **Initiate a Design Session**
  1. Click the "Create Design Session" button.
- **Click the "Link Revit View" button.**
  1. **Option 1:** Click "Link with the Active View" to link the current view.
  2. **Option 2:** Use the drop-down menu to select a specific callout from your project.

- **Enter Session Details**
  1. **Session Name:** The callout name will automatically be used as the session name.
  2. **Description:** An optional description can be added.
- **Click the "Next Step" button.**

Foundation Detail @ Glazing Assembly

General **Detail Classification** Design Support

VIEW TYPE  
Section

**View Context**  
Design Guidances for Exterior-Exterior and Interior-Interior are coming soon! [Clear View Context](#)

VIEW CONTEXT  
Exterior-Interior

**Assembly Types**  
\*Assembly Types\* refer to building assemblies such as Exterior wall, Roof, Exterior Soffit, Foundation [Clear Assembly Types](#)

ASSEMBLY A: Opening  
ASSEMBLY B: Foundation  
ASSEMBLY C: Floor

**Condition**  
\*Conditions\* is when two or more \*Assembly Types\* come together to make a condition. Select a \*Condition\* related to the \*Assembly Types\* above.

Module

Cancel Save Changes

Foundation Detail @ Glazing Assembly

General **Detail Classification** Design Support

**Modules**  
\*Modules\* refer to the \*Assembly Types\* construction makeup. Each \*Assembly Type\* includes an \*Outer Module\*, \*Inner Module\* and \*Additional Module\*. [Clear Modules](#)

**Assembly A: Opening**

OUTER MODULE: Curtain Wall

INNER MODULE: Select a Module

ADDITIONAL MODULE (OPTIONAL): Select a Module

**Assembly B: Foundation**

OUTER MODULE: Grade

INNER MODULE: Concrete

**Assembly C: Floor**

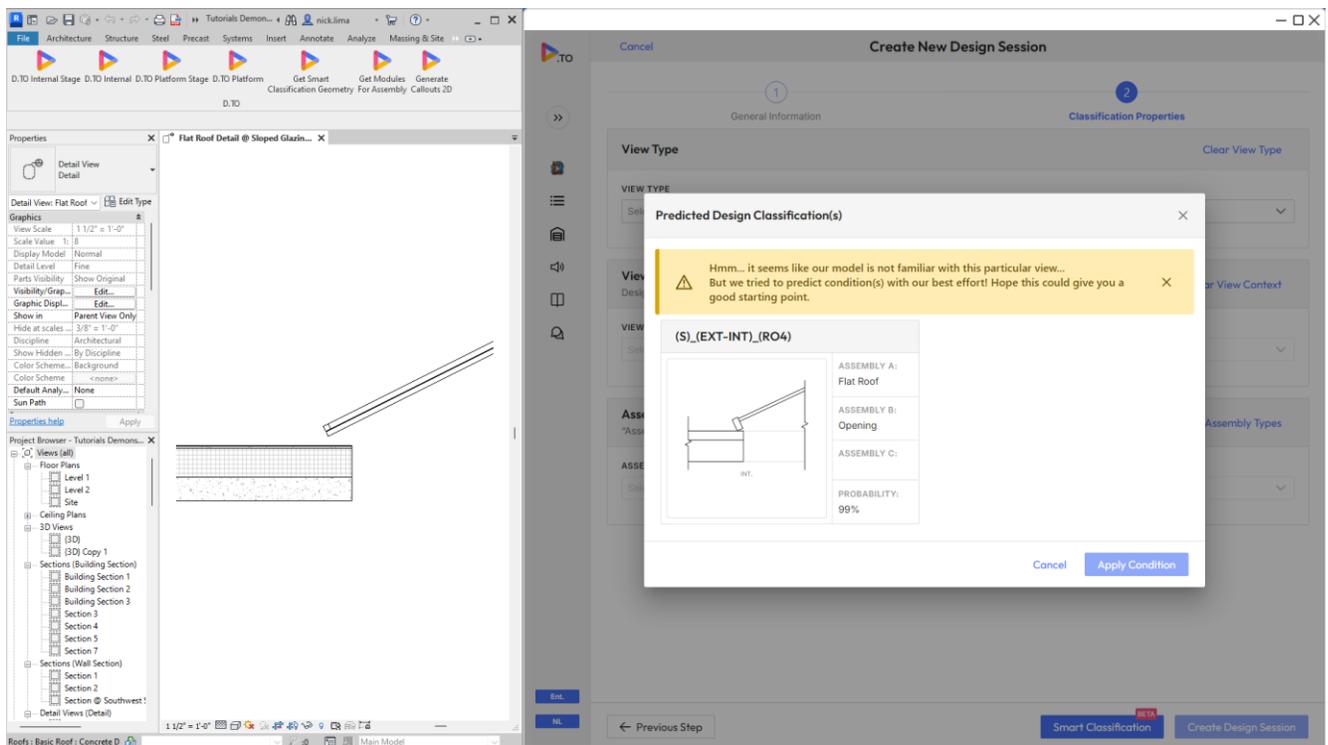
OUTER MODULE: Generic Finish Flooring

INNER MODULE: Concrete Slab on Grade

Cancel Save Changes

## Detail Classification

- **Smart Classification Beta**
  1. When in a Revit Callout, that has 3D geometry you can classify a detail utilizing Smart Classification.
  2. To activate Click “Smart Classification” at the bottom of the screen
  3. Select the Condition to Classify
  4. Some classifications may not be available, but we are constantly working to improve our AI agent.
- **Select View Type**
  1. Choose between section and plan.
- **Select View Context**
  1. Select the View context for you detail, Interior, Exterior or Building Envelope.
- **Select Assembly Types**
  1. **Assemblies:** Choose from Assembly A, Assembly B, and occasionally Assembly C.
- **Select a Condition**
  1. Select a condition that best represents the detail. Conditions represent transition types between assemblies.
- **Select Modules:**
  1. Define the D.TO modules. Each assembly includes outer and inner modules, with some combinations having additional modules.
- **Click the "Create Design Session" button.**



Tutorial Video 7: <https://youtu.be/gqoz2sah4hA?si=dpDcvFH8UHxno7rh>

## 08 Assemblies, Conditions, and Modules

### Overview

D.TO continuously expands its interactive design guidance to cover a comprehensive range of building assemblies and detail transitions. Understanding the classification of D.TO assemblies, conditions, and modules is crucial for accurate design outcomes. This tutorial will guide you through the fundamental principles of working with these components.

### Classifying Assemblies and Conditions

When starting a new design session, the selection order of assemblies will change the proposed conditions for the interactive diagram.

#### Example Scenario

You are working on a Roof Parapet Detail:

- Select **Flat Roof** for Assembly A.
- Select **Exterior Wall** for Assembly B.
- In this sequence, **Assembly C** is not used.

This provides a detail for a flat roof to exterior wall end wall. Which is a condition then what you were trying to classify.

D.TO diagrams are oriented with the building exterior on the left. It's essential to classify your assemblies from left to right to ensure accurate design outcomes.

To get the Roof Parapet the order of selections:

- Select **Exterior Wall** for Assembly A.
- Select **Flat Roof** for Assembly B.

This sequence will provide the correct condition options and guide you to the desired parapet interactive design guidance.

### Classifying Modules

Modules are subtypes of assemblies and are categorized into three types:

- **Outer:** Defines the exterior system of the assembly.
- **Inner:** Defines the core, sheathing, moisture, and thermal layers.
- **Additional:** Available for some assemblies.

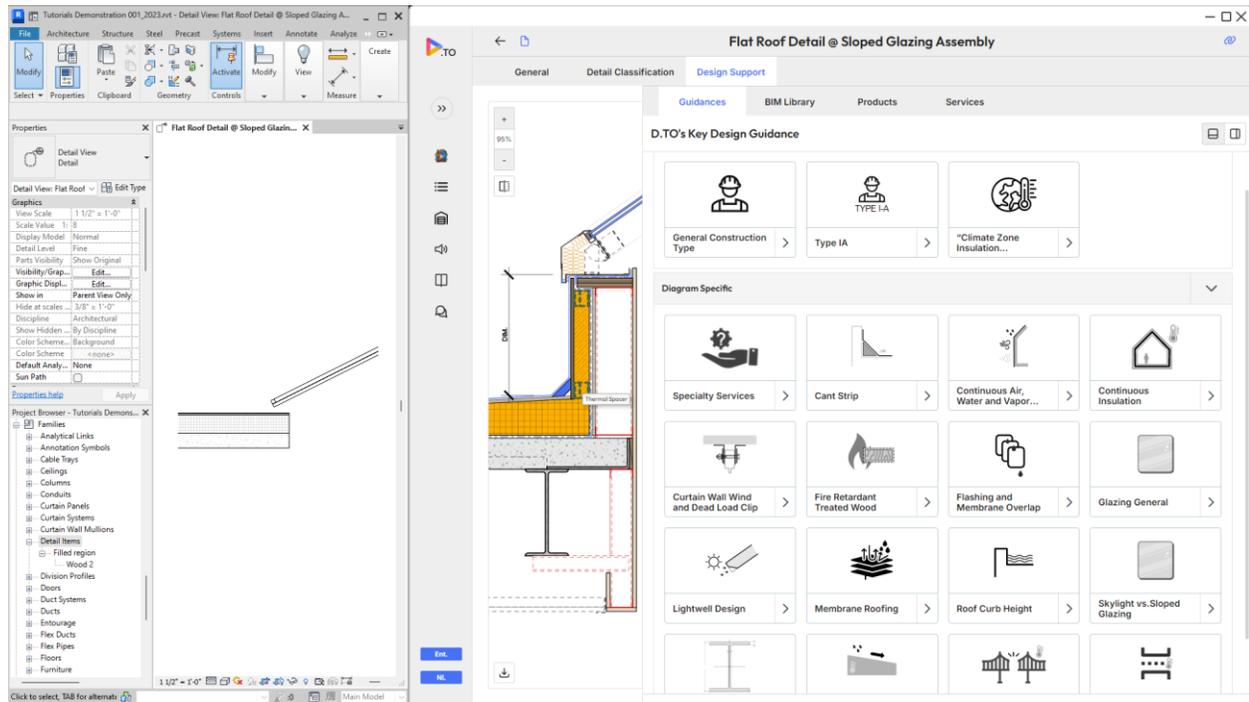
Proper classification of modules is essential for receiving specific design guidance relevant to the detail being worked on.

Tutorial Video 8: <https://youtu.be/O-Ppdv1zHRc?si=nW3TvILL1bevdGlc>

# 09 Interactive Design Guidance

## Overview

D.TO's Interactive Design Guidance provides an advanced approach to building assembly design, offering users comprehensive industry knowledge through interactive detail diagrams. This guide will help you navigate and utilize the interactive features effectively.



## Interactive Detail Diagrams

- **Hover and Click:** Explore interactive detail diagrams by hovering over their components. Click on a component to isolate it and view key design considerations related to that element.
- **Clear Selection:** Click anywhere in the white space to clear your current selection and return to the full diagram view.

## Design Guidance Cards

- **View Cards:** Access additional design guidance cards by pulling up the window. Click on a card to isolate its associated components.
- **Expand and Dock:** Expand the window and dock the design guidance to the right side for an enlarged view of diagrams.

## Diagram Navigation

- **Panning and Scrolling:** Use the mouse wheel to pan and scroll through diagrams. Zoom in and out using the available buttons.

- **Orientation Adjustment:** Use the flip vertical and flip horizontal buttons to adjust the diagram orientation to match your Revit callout. Rotate buttons are available for further alignment with Revit details.

## Plan View Adjustments

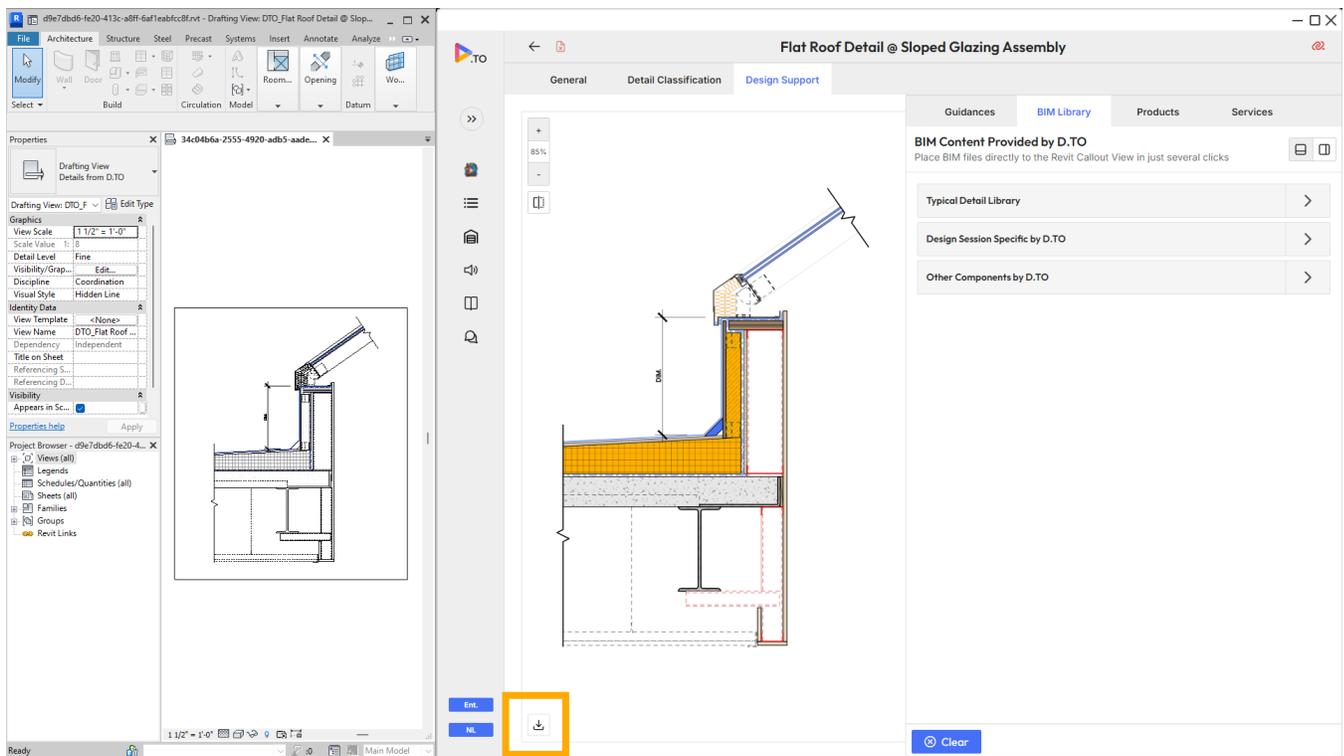
- **Match Orientation:** When working in plan view, utilize the flip vertical, flip horizontal, and rotate buttons to align the diagram with your Revit detail orientation.

Tutorial Video 9: <https://youtu.be/u1XW7tluDD8?si=ECN1DKTLDz7tvSmM>

## 10 BIM Integration: Interactive Diagrams

### Overview

D.TO's BIM integration allows seamless incorporation of interactive diagrams into your Revit project, facilitating efficient design detailing and customization. This guide will walk you through integrating these diagrams into your Revit environment.



### Download the Interactive Diagram

1. To download click the button in the bottom left corner of the diagrams interface.
2. Agree to the terms and conditions presented.
3. A new temporary Revit project will open, with the D.TO diagram in a drafting view composed of parametric Detail Items.

## Integrate Diagram into Your Project

1. Select all the detail components from the temporary Revit project.
2. Copy and paste these components into your project.
3. Or save the temporary Revit project and use Insert from File to bring in the Drafting View.

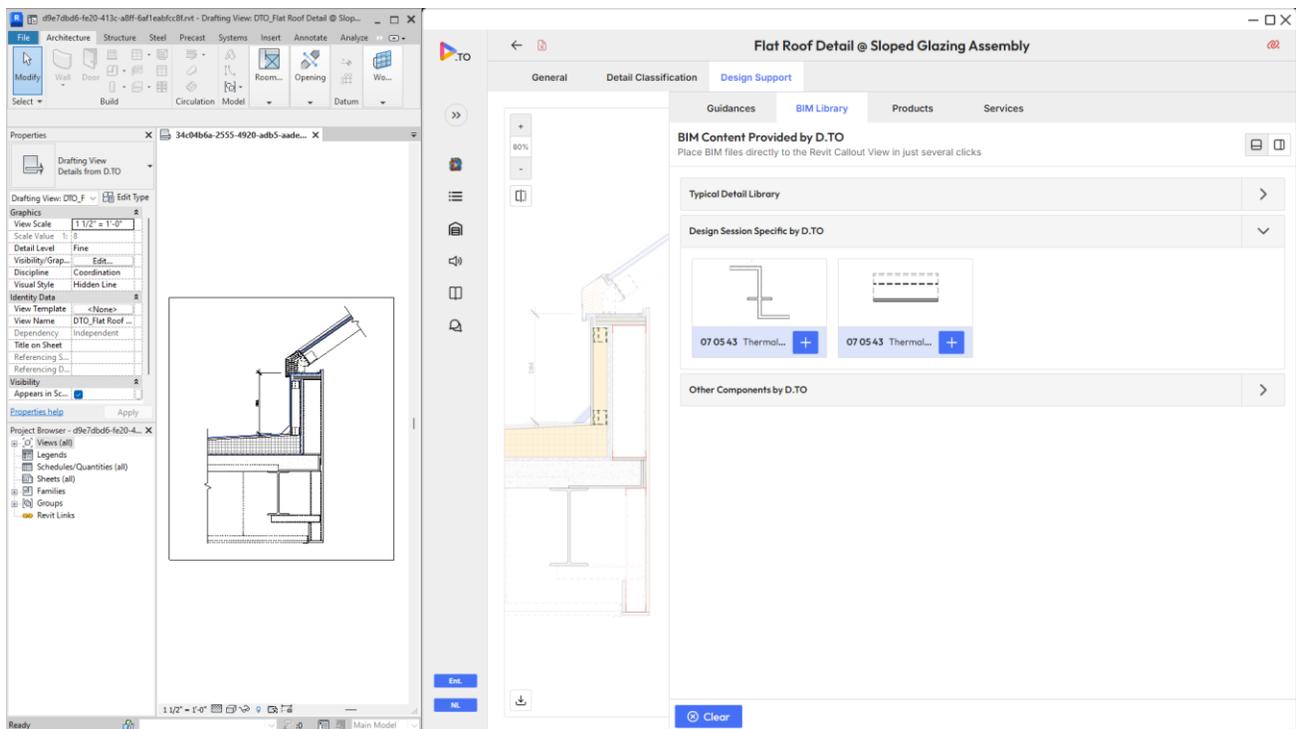
These details serve as a foundational starting point, which you can customize based on your project's specific requirements. The components come with dimensional and keynote parameters based on the CSI Masterformat.

Tutorial Video 10: <https://youtu.be/guc6Flu7LF4?si=wKDprTKcavT-3nvZ>

## 11 BIM Integration: Individual Components

### Overview

In this section, you will learn how to access and integrate additional individual components into your Revit projects using the D.TO BIM Library.



### Accessing the BIM Library

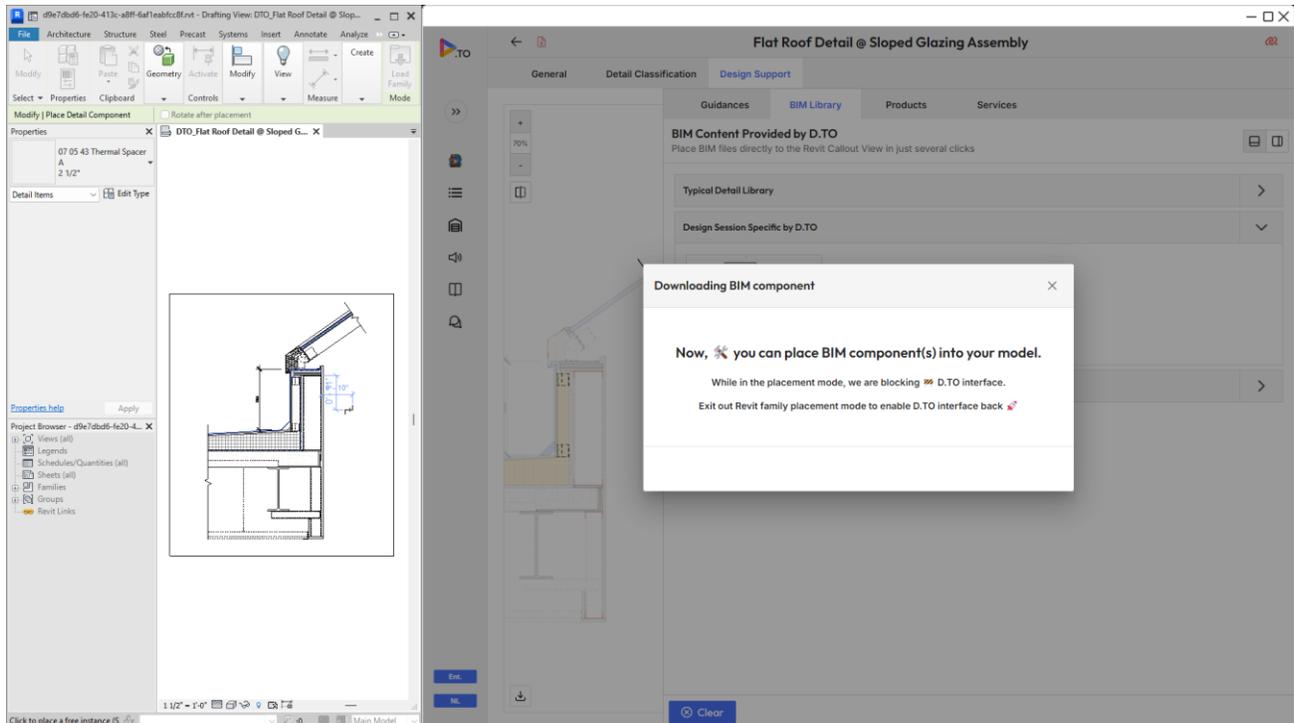
1. Navigate to the BIM Library within a Design Session.
2. The BIM Library includes your company's "Typical Detail Library", "Design Session Specific Components by D.TO", and "Other Components by D.TO".

## Locating Components

1. Scroll through the BIM Library or use the interactive diagram.
2. Click on a diagram component to isolate its related BIM components.

## Activating Components

1. Select a BIM component to activate it within your Revit project.
2. If applicable, choose a Component Type.
3. Place the component in your project detail.



## Note: Already Loaded Components:

- If a component already exists in the project:
  - Using the BIM Library to place the same component will utilize the version from your project.
  - For example, if you edit a family and make updates (such as changing the filled region), these updates will be maintained when loading it back into your project, as long as you use the same family name.

Tutorial Video 11: [https://youtu.be/vWWyBS1u3LI?si=\\_ekhGEjJGZWM0rd-](https://youtu.be/vWWyBS1u3LI?si=_ekhGEjJGZWM0rd-)

# 12 BIM Integration: Loading Content/Managing Duplicated Revit Families

## Overview

This tutorial addresses common issues encountered when loading Revit families and managing them within a project using D.TO's BIM integration features. Specifically, it tackles the scenario where a warning message indicates that a family already exists in the project and will be renamed to avoid conflicts. Such warnings typically arise due to:

- Upgrading a family from an earlier version.
- Saving a family with the same name to a different location.
- Copy-pasting families with identical names into the project.

This guide provides workflows to effectively manage these scenarios.

## Steps to Manage Duplicated Revit Families

### Scenario 1: Inserting Components from D.TO's BIM Library

When using D.TO's BIM library to place components that are not yet in the project:

- 1. Insert Diagram Components:**
  - If you download and copy-paste an entire diagram into your project, duplicated components will be renamed.
  - Review your project browser for any duplicated components immediately after insertion.
- 2. Replace Duplicated Components:**
  - Select all instances of the duplicated component.
  - Replace them with the original component in the project.
  - Delete the duplicated component from the project.

**Note:** Instance parameters will reset to their default values when replacing duplicated components.

- 3. Prevent Duplication:**
  - Download diagrams into your project first.
  - Use the BIM library to insert individual components afterward.

### Scenario 2: Revit Workshare Projects

In a workshare project, multiple users may download diagrams containing identical components or place the same family from the BIM Library simultaneously:

- 1. Sync After Download:**
  - Each user should sync immediately after downloading a diagram.
  - Alternatively, assign one user to download all design sessions before the rest of the team uses the BIM library.
- 2. Load Components Without Placement:**

- Load the component but refrain from placing it in the project.
- Press escape to cancel placement, leaving the component loaded.
- Sync immediately to allow the team to place the same component without warnings.

## Updating Components

D.TO will periodically provide new and updated content based on user needs. When loading an updated component:

1. **Automatic Renaming:**
  - If an older version of the component exists in the project, it will be automatically renamed.
2. **New Solution:**
  - An icon will be added to identify updated components.
  - Users will have two options when loading a component:
    - Overwrite the existing component.
    - Download the latest version.

**Tip:** To keep both the updated and existing components, rename the components in your project before loading the new version.

Tutorial Video 12: [https://youtu.be/jNWd2khIPfM?si=\\_p3lzqXA0l0CrTVG](https://youtu.be/jNWd2khIPfM?si=_p3lzqXA0l0CrTVG)

## 13 Company Library: Preparing Your Company Details for Upload

### Introduction

D.TO offers a comprehensive tutorial to guide you through preparing and uploading your company details. This process is crucial for ensuring that your details are compatible and organized in a manner that integrates seamlessly with the D.TO platform.

### Supported Versions

D.TO supports Revit versions starting from 2023 and all subsequent versions. Ensure that you are managing your detail library in the earliest Revit version used by your firm to maintain compatibility.

### Uploading Methods

D.TO provides two methods for uploading details:

1. **Direct Import from Revit View:** Import details directly from a Revit view.
2. **File Browsing:** Upload other supported file types by browsing through your files.

### Classification System

D.TO employs a specific classification system aligned with design sessions, which includes six key components:

1. **Project Parameters:** Define selections such as climate zone and construction type.
2. **View Context:** Categorize details into:
  - **Exterior to Exterior:** Exterior details.
  - **Exterior to Interior:** Building envelope details.
  - **Interior to Interior:** Interior details.
3. **View Type:** Includes:
  - **Plan:** Plan details.
  - **Section:** Section details.
4. **Assemblies:** Typical building systems.
5. **Conditions:** Transitions where two or three assemblies meet.
6. **Modules:** Components of an assembly, including finish, backup system, and additional options.

## Best Practices

1. **Organization & Naming Conventions:** Develop your firm's organization and naming conventions based on the D.TO classification system to streamline the uploading process and simplify future maintenance.
2. **Existing Details:** If details are stored in Revit container files, ensure they are organized according to the D.TO classification system for a smoother upload process. For details extracted from previous projects, adjust them in the project file's detail view before uploading.
3. **Starting a New Library:** Utilize D.TO's design sessions and BIM Library to build details from scratch or convert existing CAD details into BIM details.

Tutorial Video 13: <https://youtu.be/aiNEj1W8cJg?si=zcxRUJV3d4jX9O6s>

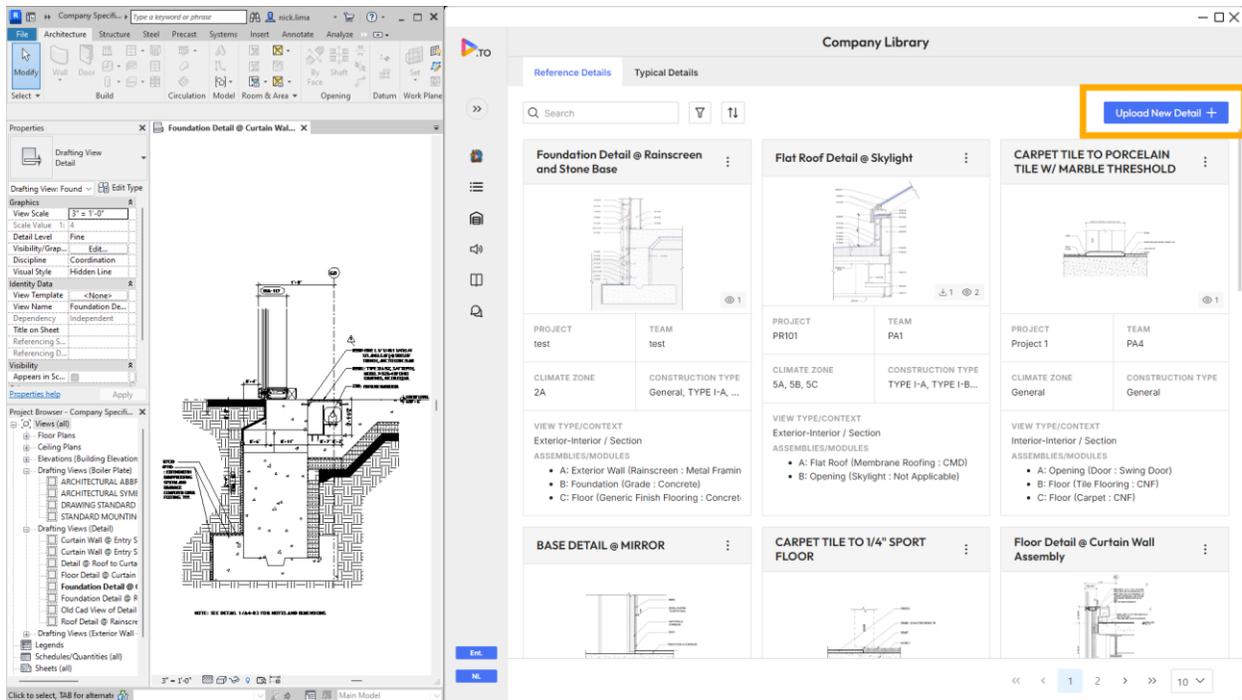
## 14 Company Library: Uploading Details to Your Company Library

### Overview

This document provides a step-by-step guide for uploading details to your D.TO company library. Follow these instructions to ensure that your details are properly classified and available for use.

### Accessing the Upload Function

1. **Open Revit View**
  - Begin by opening the Revit view that contains the detail you wish to upload.
2. **Navigate to D.TO Company Library**
  - Go to the homepage of your D.TO company library.
3. **Start Upload Process**
  - Click the "Upload New Detail" button to initiate the classification and upload process.



## Filling Out General Information

### 1. Detail Information

- Enter the detail name.
- Specify the project name.
- Indicate the team name.
- Provide the location of the project.

### 2. Classification

- Select all relevant climate zones and construction types for the detail. If applicable categories are not available, choose "General."

## Selecting View, Assembly and Condition Classification

### 1. View Context and Type

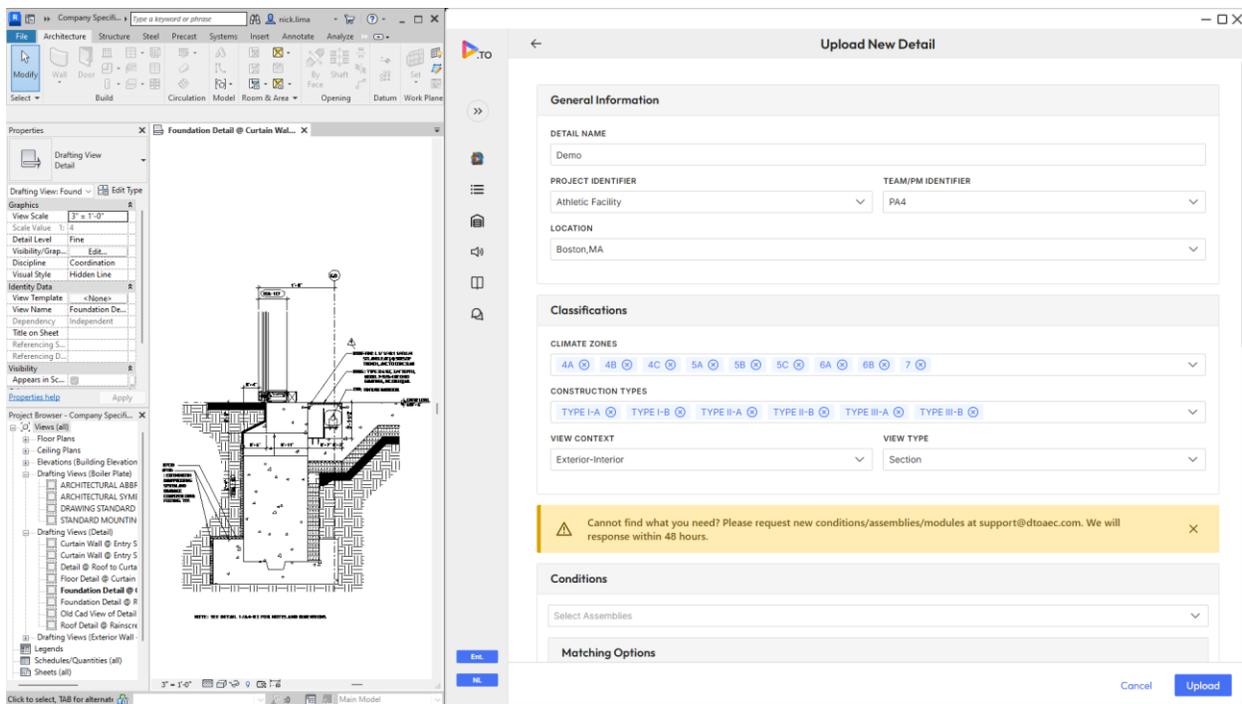
- Choose the view context and view type that correspond to your detail.

### 2. Assembly Selection

- Select the appropriate assemblies for isolating applicable conditions.
- If you cannot find the necessary assemblies in the classification system, contact support at support@d.to.

### 3. Condition and Module Selection

- Choose the corresponding condition for the detail.
- This will activate module selections for each assembly.
- For each assembly, select both the outer and inner modules. Optionally, you may also select additional modules.



## Providing Detailed Information

### 1. Description Section

- Enter company-specific design guidance for this condition.
- Include sketches, images of the construction process, or other resources that will assist users in applying this detail to their projects.

## Uploading Files

### 1. Add Files

- Click "Add Files" to upload documents.
- Choose "Export from Revit" to directly import your Revit detail view into the library.

### 2. Thumbnail Selection

- Select "Set as Thumbnail" if you want this view to be the thumbnail image.
- If you prefer a different image, navigate to the classification page and select "Update Thumbnail."

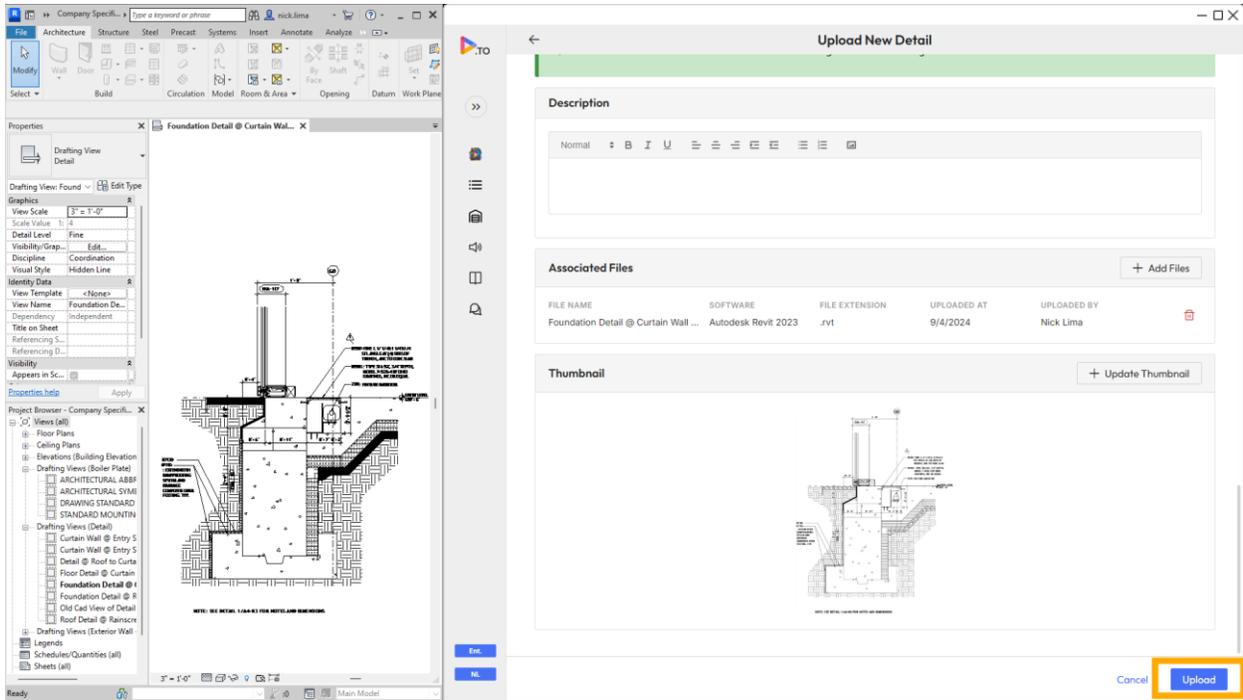
### 3. Additional Files

- Browse files to add other types of resources that users can access while working on their projects.

## Completing the Upload

### 1. Review and Upload

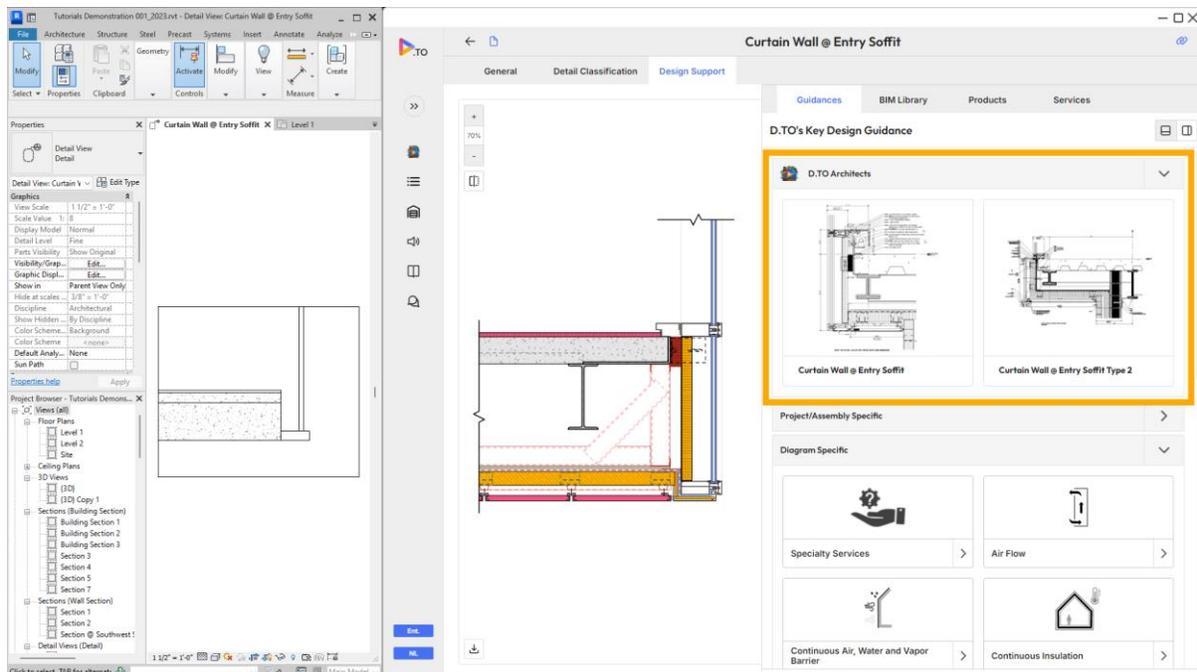
- After completing the classification, click "Upload" to add the detail to your company library.
- Review your upload by selecting the detail card in the detail library.



Tutorial Video 14: <https://youtu.be/1u5NX6GKCKQ?si=-r8UqSlRQcT3RPqr>

## 15 Company Library: Accessing Your Company's Library from a Project Introduction

The D.TO Company Library empowers your team with curated content, providing immediate access to both D.TO's interactive design guidance and your firm's unique details and guidance.



## Accessing Your Company's Detail Library

- When a design session is classified in D.TO, users gain access to specialized industry knowledge, including high-performance building science concepts. Once your company's details are uploaded, they become available through D.TO's logical delivery system, eliminating the need for time-consuming searches.
- Users can access the Company Detail Library by clicking on the 'Detail Libraries' tab in the side menu. Use filters to refine selections based on D.TO's classification system and project details. Select the desired detail card and import it into your Revit project.

Tutorial Video 15: <https://youtu.be/g-dk2tNdbaA?si=lTXhdYJRxlYKNiQq>

## D.TO Support

For further assistance, contact D.TO Support: [support@dtoaec.com](mailto:support@dtoaec.com)