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## MasterKey Set Up & Use Manual

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# 1. Introduction

1.1. MasterKey is a Revit Plug-in developed by Masterspec. The tool simply replaces the background text file used to derive keynotes with an online database generated by your projects specification. The plug-in use the same Keynote by Element, Material or User tools as come standard with Revit but provides some additional functionality. It is a project specific tool, meaning that keynotes will vary between projects but will be linked directly to the projects specification selections.

1.2. Risks and benefits:

Pros (MasterKey)	Cons of current system (excel spreadsheet)
Specification started earlier on in a project	Only one person being able to write a keynote in current system.
Masterspec maintaining it	A person has to maintain the spreadsheet and doesn't get updated with suppliers information which changes all the time
Only writing it once. Update done once too.	Double up of work as writing in specification and writing in excel spreadsheet
Direct Connection between project specification and project drawings	To many lines in the current excel spreadsheet to choose from
Staff can only choose products specific to a project	Staff working in Revit can choose 'any' keynote in the spreadsheet rather than being limited to products and materials on project.
Focuses builder to read specification on site, next version will have hyperlinks	A lot of families need to be maintained to ensure the CBI numbers up to date and specification keynotes are correct.
More reference to specification and supplier's info rather than on drawings	To much keynoting for one product, there are also risks that a supplier may have changed methods and this has not been updated in the spreadsheet.
	To detailed at concept/prelim/developed design when materials are still being worked through

## 2. Initial Set Up

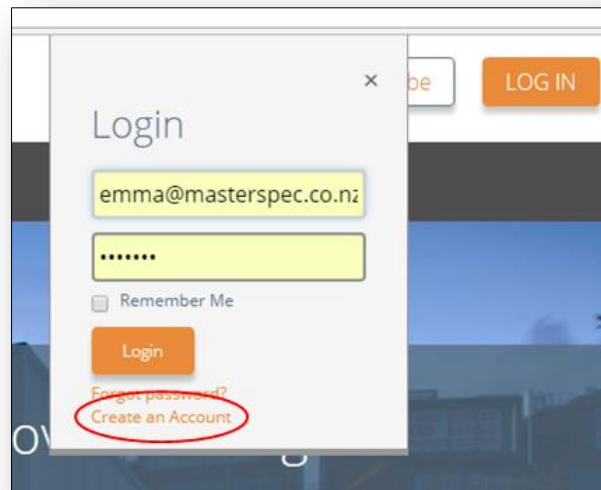
- 2.1. If you have an existing Masterspec Login please go to **3 Revit Setup**. If not please read on.

Click on below link to set up a Masterspec account and connect to the online specification database.

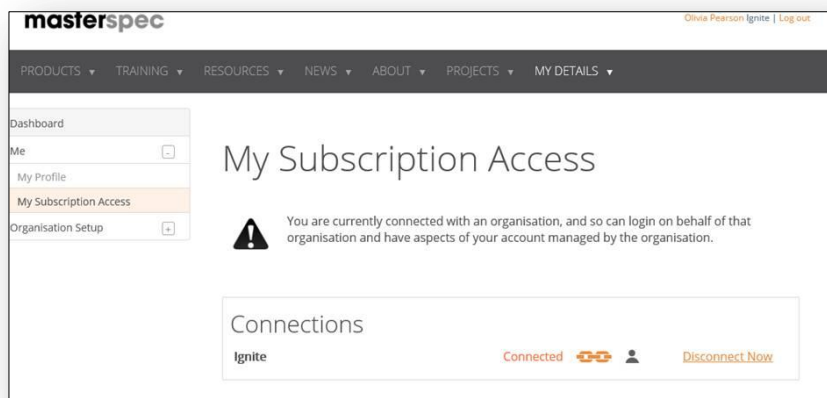
Ensure you open Masterspec in Google Chrome, as it works best in this browser.

<https://masterspec.co.nz/>

- 2.2. Enter your email address and a password. **\*\*Note the passwords are viewable by Masterspec staff so don't use your bank passwords etc\*\***



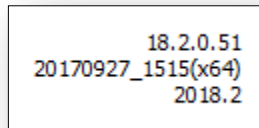
- 2.3. Navigate to My Details, My Subscription Access and click on connect to your company.



Note: If you are unable to see a connection then please contact Masterspec to update the office permissions to include you as a user.

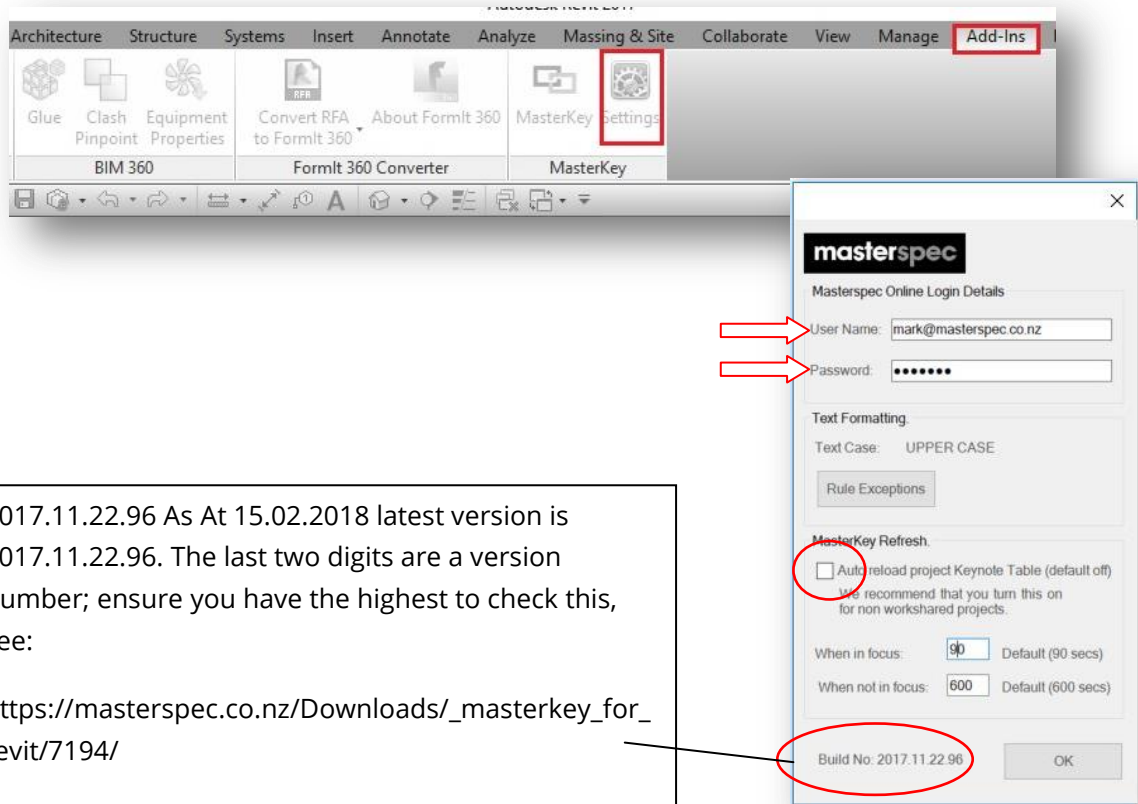
### 3. Revit Setup

- 3.1. Check that the Revit Build number installed is the most current one that the office is using and that all members of the project team have the same build: Go to the pull down menu next to the question mark in the top right corner of Revit, Select About Autodesk Revit 20XX.X and check the details in top right. Below is an example



- 3.2. Click on the Add-ins tab, Find the MasterKey section and select settings. (Note if this is not visible the plug-in needs to be installed by ICT first)

Enter your Masterspec login details ie: using the same user name and password that you just created in the Masterspec website. Ensure refresh option is un-ticked and check that the MasterKey build number is the current one:



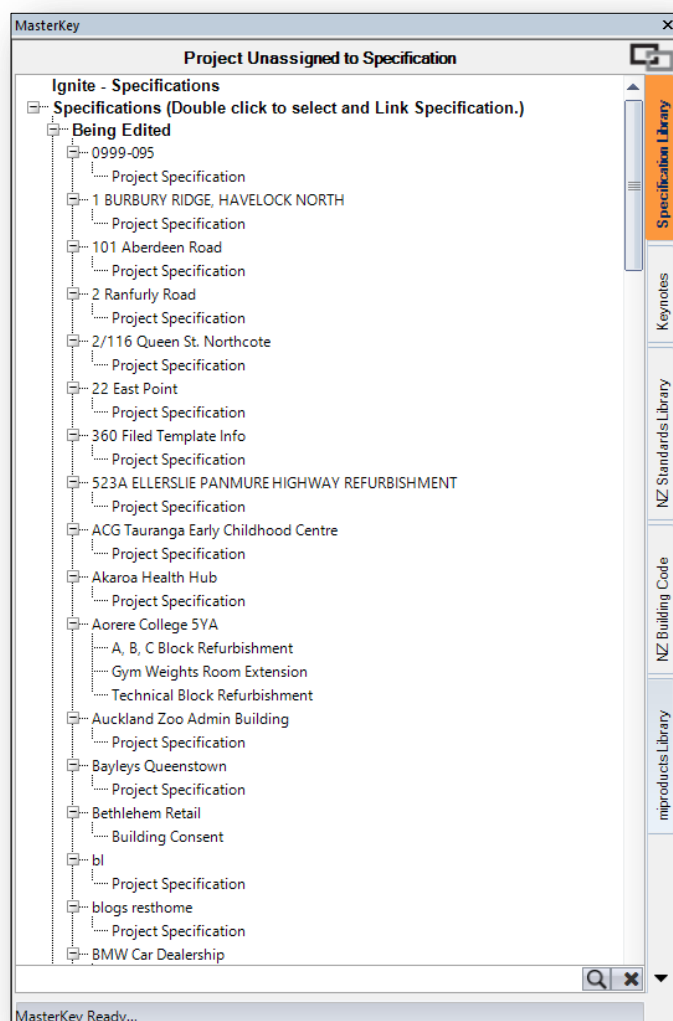
2017.11.22.96 As At 15.02.2018 latest version is 2017.11.22.96. The last two digits are a version number; ensure you have the highest to check this, see:

[https://masterspec.co.nz/Downloads/\\_masterkey\\_for\\_revit/7194/](https://masterspec.co.nz/Downloads/_masterkey_for_revit/7194/)

Ensure all project members are on the same version, as being on different versions may lead to inconsistent results.

Note: All Project team members must have the same build number. Please check this regularly during the projects lifecycle.

- 3.3. Click on MasterKey and dock in the Revit window. Please dock if possible on the same page as the drawing space as a TAB. Revit can create issues for any add in that is docked on another screen.

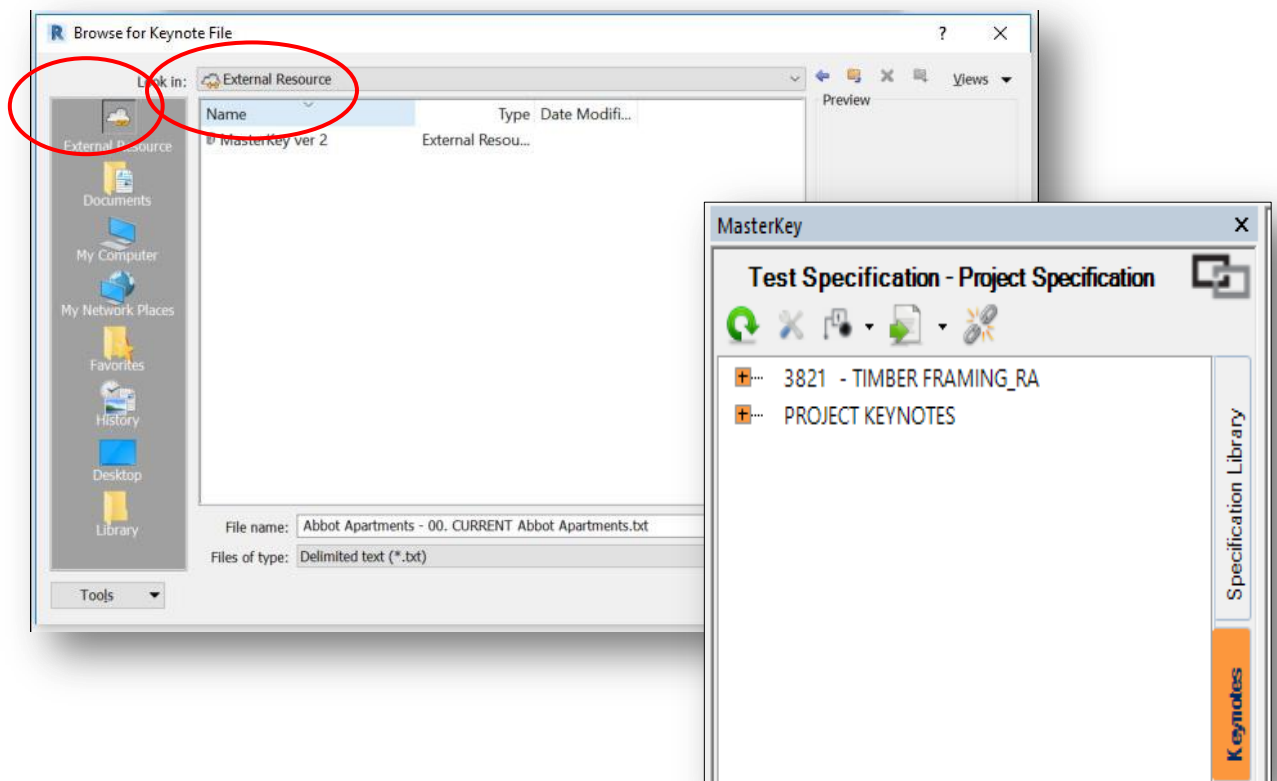


## 4. Link Revit and Spec

Note: The following assumes that your specification has been started.

The following is a onetime process to be completed at initial setup by the projects model manager.

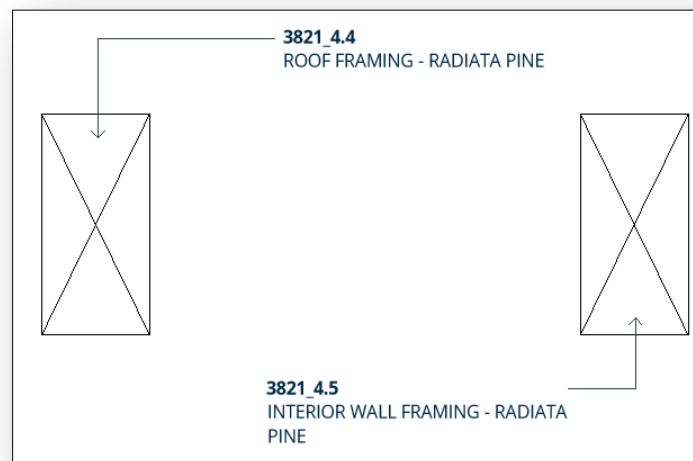
- 4.1. Ensure no other users are in the file, and then open the central file of your model.
- 4.2. In the MasterKey Palette, click the Specifications Library Tab, and either using the search function or by scrolling find and double click on your projects specification. It is important here that the correct spec is located.  
Note: the specification should be named in the format 00\_“Project Name”\_Live
- 4.3. Press SAVE!! This is important otherwise step 4.4 and 4.5 cannot occur.
- 4.4. Once loaded the Palette will default to the Keynotes tab and display the keynotes available for the selected spec
- 4.5. Now Select the Annotate tab, Keynotes dropdown and Keynote Settings
- 4.6. Select Browse, Select External Resource from the menu on the left, Select Masterkey ver 2 in the browser window and your spec, Click Open.
- 4.7. Sync to central and close the file. All team members can now open new local files and keynotes will be available for use and the location of the keynotes will be consistent for the project team. The location of the keynotes will be consistent for the project team.



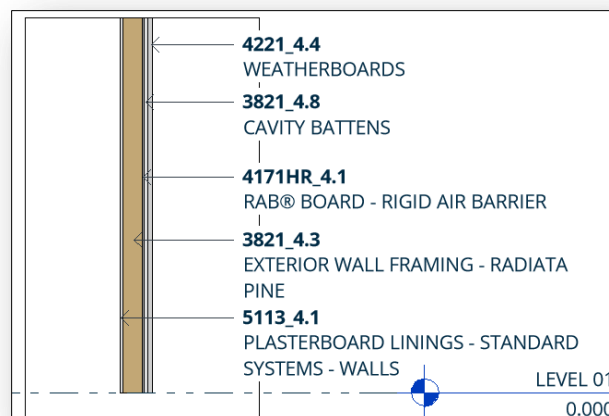
## 5. Keynote Use

Keynotes use should be limited to Element and Material types. Use of "User" keynotes is to be avoided. User notes are instances based and when you make changes you then have to apply them on a case by case basis. User notes are only useful if it a unique note only used once.

5.1. Element Keynotes tag Modelled "elements" and Detail components. Note the keynote attaches to all instances of that type in the model, therefore if you require a different keynote a duplicate or alternative element is required as below. If you overwrite the existing keynote this will overwrite all instances within the project so be careful!!



Material Keynotes tag an elements material. In the below example each layer of the wall has had a material specified which can then be keynoted:





## 6. Specification writing

6.1. Additional training will be provided for Specification writers however there are a few items which do affect MasterKey.

- Avoid deletion of clauses in Section 4: Selections, instead replace the title with deleted and add any new or replacement keynotes to the end of the existing selections list. This ensures that keynote numbering is not affected on the drawings. Revit users will need to replace any keynotes displaying deleted with specified replacement, a one click process.
- Check you don't have any double ups of text and material ie: H3.2 Plywood in roofing section & H3.2 Plywood in Timber section.

## 7. MasterKey Approach during different design phases.

### 7.1. Concept/Preliminary Design

- The top level of numbering to be used during concept/prelim design/beginning of developed design ie either 43 roof cladding, or 4311 profiled metal roofing, 42 wall cladding or 4221 timber board cladding etc. If a more specific material is known then specify it, ie 4221-4.1 Cedar Cladding

### 7.2. Developed/Detailed Design

- Then move on to using the specific numbers once a material and supplier has been chosen during developed/detailed design. Swap the spec section and keynote ie 4311\_4.1 Euramax smartray lock seam roof cladding, 4221CH\_4.1 Cedarscreen rusticated weatherboards.

## 8. Keynotes vs Tags vs Families

- Keynotes should be used to describe Materials and Selections. Tags and notes should be used to describe the construction, methodology and specifics of a detail.
- Existing families and container families. These can still be used as usual; the keynote just needs to be redirected to the new keynote.
- It's also easy to tell if the keynotes have not been redirected, see below difference.

Example of old keynote:

**3821-06 TIMBER FRAMING - WALLS**

Example of new keynote:

**3821\_4.4**  
ROOF FRAMING - RADIATA PINE

## Common Error Messages

Figure 1 indicates MasterKey is not installed, Figure 2 indicates that MasterKey is installed but you have not logged in.

Figure 1

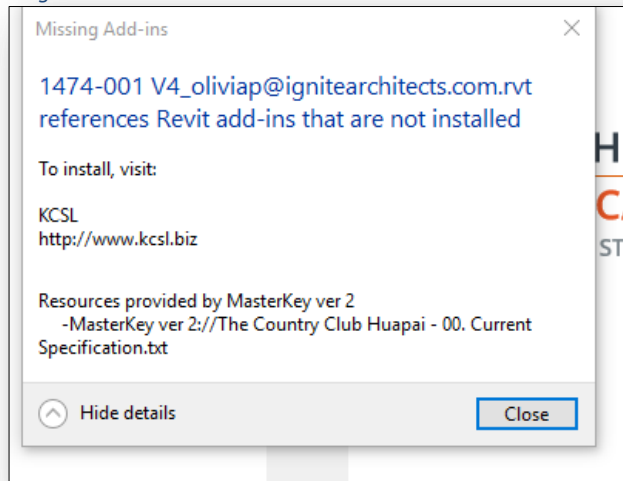


Figure 2

