

STEP-BY-STEP GUIDE: SETTING UP A TEMPLATE AUTODESK REVIT

1



Start with a New Template

- Open Revit.
- Under models select new
- Choose an appropriate template to start with.
- Select create new project template.
- Press ok

2



Configure Project Settings

- On the Manage tab click Project Units and set your desired units for length, area, volume, etc.
- Go to an elevation view & create or adjust levels as per your typical project requirements.
- Go to a floor plan view & create grid lines to match your standard project layouts.



3



Annotation Styles

- Text Styles - On the annotate tab click on Text and Edit Type. Modify existing text styles or create new ones.
- Dimension Styles - Click on Aligned Dimension. Select Edit Type and adjust settings like text size & line weights.
- Tags - Customise tags by going to Annotate > Tag Edit Family. You may need to load a tag family.

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Set Up View Templates

- Go to the View tab.
- Click on View Templates > Manage View Templates.
- Create new view templates or modify existing ones to standardise view settings like visibility, graphics, and annotations.
- This may take a while but it is worth spending time getting this just how you want it.

5



Load and Configure Families

- Go to the Insert tab.
- Click on Load Family and browse to find the families you frequently use.
- Load these families into the project.
- Customise these families by going to Family Editor if necessary.
- Try not to add too many families because it will increase the file size.

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Create Views and Sheets

Standard Views:

- Create typical views like floor plans, elevations, and sections
- Go to View tab > select either plan, elevation, section or 3D to create these views.

Sheets:

- Go to the View tab and click on Sheet > New Sheet or load
- Set up the title block.

7



Save the Template

- Go to the File menu.
- Select Save As > Template.
- Name your template file and choose a location to save it.
- Click Save.

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Test and Refine

- Open a new project using your newly created template.
- Test the settings and configurations to ensure they meet your requirements.
- Refine and adjust as necessary, saving any changes to the template file.