DATUM

DATUM BIM · REVIT TEMPLATE

Revit Template Checklist

Build a template in 15 steps — in the order that saves rework

Work through the steps in order: each one leans on the one before. Every line says where to find it in Revit. Tick the boxes right in the PDF — or print it and keep it next to the screen.

TEMPLATE	REVIT VERSION	DATE	CHECKED BY

Before step 01 — template vs project

- A template is an ordinary Revit file saved as .rte. Every new project is a copy of it (File → Save As → Template).
- Changes to the template never reach projects already started — use Manage → Transfer Project Standards for those.
- Set it as the default: File → Options → File Locations → Project template files.
- Never draw a project inside the .rte itself — always start a new project from it.

PART 01

GRAPHIC STANDARD

How every drawing looks — before the first wall is drawn.

01 Language and naming

File → Save As → Template

- [ ] Language decided before the first parameter — names are the hardest thing to change later
- [ ] One prefix for everything of yours (types, families, patterns, parameters), e.g. DTM_
- [ ] No spaces and no local characters in parameter names — formulas, add-ins and colleagues abroad need them clean

02 Project Information and units

Manage → Project Units · Project Information

- [ ] Project units set once: length, area, volume, slope
- [ ] Project Information filled in one place: project, client, address, stage
- [ ] A start view the project opens on (Manage → Starting View)

03 Lines and pens

Manage → Additional Settings → Line Weights · Styles · Patterns

- [ ] Line weights set before Object Styles — Object Styles only point to a pen number
- [ ] Line styles named after their pen: Pen 01 … Pen 10, plus Dash / Red / Blue variants
- [ ] Pen 1 is the thinnest — Revit draws material hatches with it

04 Fill patterns and materials

Manage → Additional Settings → Fill Patterns · Materials

- [ ] Fill patterns first, then materials — the material carries the cut and surface pattern
- [ ] Pattern names you can say out loud: _Bricks_1, _Section_Concrete, _Grass_1
- [ ] As few materials as possible; every downloaded family's materials purged

05 Object Styles

Manage → Object Styles

- [ ] Weight, colour and pattern set for every Model, Annotation and Imported category
- [ ] No extra subcategories — every one is one more row to maintain
- [ ] Lines from foreign subcategories moved into the standard ones, the foreign ones deleted

06 Text and dimensions

Annotate → Text · Dimension → Edit Type

- [ ] Picking the right style is faster than making a new one
- [ ] Style name = size + colour: 2.5mm_Black, 2.5mm_Blue, 2.5mm_Red
- [ ] Dimension styles for linear, angular, radial, spot elevation and an ordinate type with no lines (value only)

07 Tags and symbols

Annotate → Tag □ → Loaded Tags and Symbols

- [ ] Every tag you plan to use is loaded, with all the types you need: doors, windows, rooms, areas
- [ ] Tags assigned in Loaded Tags — Tag by Category and Tag All pick the right one by themselves
- [ ] Levels, grids, elevation and section marks speak one graphic language

PART 02 DATA AND FAMILIES

What the model knows — and what it is built from.

08 Parameters

Manage → Shared · Project · Global Parameters

- [ ] Shared — only when the parameter is tagged or goes into a schedule
- [ ] Project — for data about views, sheets and the project itself

- [ ] Global — values written once that drawings follow (e.g. terrain level)
- [ ] One shared parameter file for all families and tools; keep the list short

09 Families

Edit Family → Family Types · Manage → Purge Unused

- [ ] Every downloaded family cleaned: materials, nested families, subcategories
- [ ] Shared parameters that are never tagged turned into family parameters
- [ ] Prefix in the name, sizes in the type name
- [ ] Tested in an empty project: plan, section and schedule
- [ ] Families developed in the template file itself — copying between files breeds "Type 1", "Type 2"

PART 03 VIEWS

How the model becomes a drawing — and how you find it in the browser.

10 View Templates

View → View Templates → Manage View Templates

- [ ] A view template for every kind of view: site plan, floor plans, roof, existing, areas, presentation
- [ ] Each template holds Visibility/Graphics, scale, detail level and phase
- [ ] Template assigned to the view type (View Template applied to new views)
- [ ] Templates locked on sheet views, left open on working views

11 Project Browser

View → User Interface → Browser Organization

- [ ] Views grouped by purpose — areas, presentation, permit set, existing, demolition
- [ ] Sorted by a view parameter, not by name — the browser sorts itself

PART 04 DOCUMENTATION

Legends, schedules, sheets — and a test on a real project.

12 Legends and detail items

View → Legends · Annotate → Detail Component

- [ ] Legends ready before the first sheet: walls, site, elevations and sections, general notes
- [ ] Wall legend built with Legend Components — change the wall type, the legend follows
- [ ] 2D graphics that are not model kept as prefixed detail components

13 Schedules

View → Schedules → Schedule/Quantities

- [ ] Working schedules — edit the model through the table
- [ ] Check schedules — show what is missing
- [ ] Documentation schedules — go on the sheet: doors, windows, areas, finishes, sheet list, revisions
- [ ] An area / indicator schedule as the best model check: a strange number means a wrong model

14 Sheets and title blocks

View → Sheet · Insert → Load Family

- [ ] One parametric title block with yes/no switches instead of five separate ones
- [ ] Ready sheets from site plan to sections, with views already placed
- [ ] Schedule frames waiting in the template

15 Test and automate

Manage → Transfer Project Standards

- [ ] The template drawn through one real project end to end
- [ ] A list of fixes kept during the project
- [ ] Fixes carried back into the template once, at the end
- [ ] Repetitive steps (tags, dimensions, sheets) handed to a plugin or script

AVOID

Six common mistakes

1. **Local characters and spaces in parameter names**
   hard on formulas, add-ins and colleagues abroad
2. **Downloaded families not cleaned**
   materials, subcategories and shared parameters everywhere
3. **Too many project parameters**
   easy to add, hard to remove
4. **Views without a View Template**
   every change by hand, view by view
5. **Tags missing from the template**
   every project loads them again — differently
6. **A "finished" template never used on a real project**
   the mistakes show up on the first drawing set

Skip the 15 steps?

DATUM templates for Revit come with all of the above already set up — graphic standard, families, view templates, schedules and sheets.

datumbim.com/templates →