



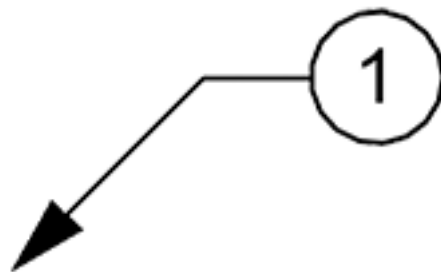
REVIT PURE PRESENTS

PAMPHLETS



ISSUE #8 / SPRING 2018

PLAN NOTES



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WHAT IS THIS “PAMPHLET” ?

Revit Pure Pamphlets are published 4 times a year by email. Each edition covers a very specific Revit theme.

We like to pick themes that are complex and confusing. Our job is to make these topics simple for you.

Here are all pamphlets published so far:

Pamphlet #1 - Summer 2016 - **Worksets**

Pamphlet #2 - Fall 2016 - **Schedules**

Pamphlet #3 - Winter 2017 - **Phases**

Pamphlet #4 - Spring 2017 - **CAD**

Pamphlet #5 - Summer 2017 - **Filters**

Pamphlet #6 - Fall 2017 - **Virtual Reality**

Pamphlet #7 - Winter 2018 - **3D Views**

Pamphlet #8 - Spring 2018 - **Plan Notes**

Go to revitpure.com to subscribe and receive all pamphlets.

WHY PLAN NOTES?

The last two issues of Pamphlets focused on the design and presentation aspects of Revit, with 3D Views and Virtual Reality. In this issue, we are back to the technical stuff! This is a tutorial to create an efficient plan note system. You will also learn how to create an elevation material legend.

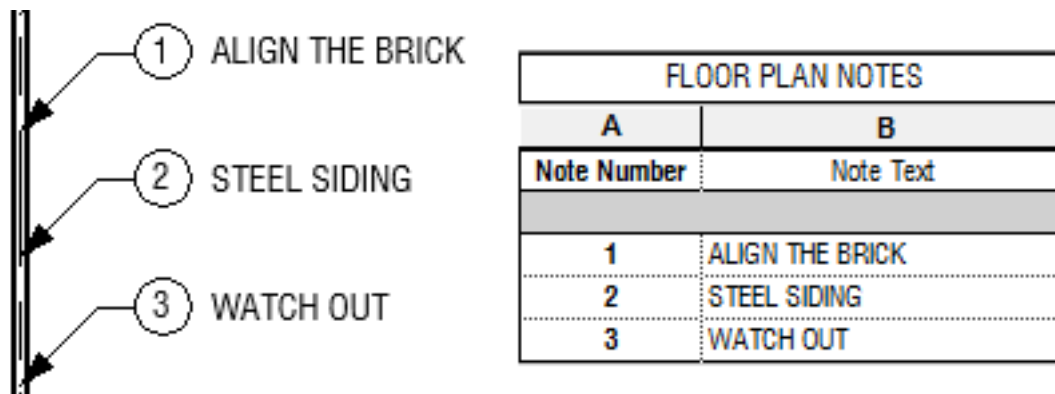


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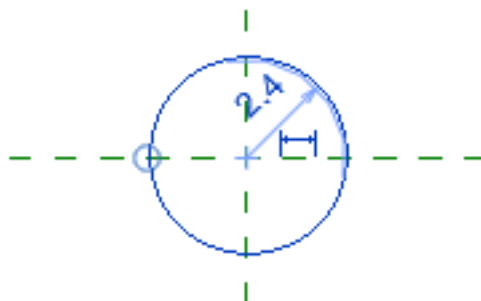
6 STEPS TO CREATE EFFICIENT PLAN NOTES

This guide will teach you all the steps required to create a plan note system using a **Generic Annotation** family and the **Note Block** tool. While it is possible to create a similar system using Keynotes, it is much more complicated and we recommend the Note Block technique for most users.



1- CREATE A BUBBLE GENERIC ANNOTATION FAMILY

Create a new **Generic Annotation** family. Draw a circle bubble or any shape that you want for your note number, using the **Line** tool or a **Masking Region** if you want it to be opaque.





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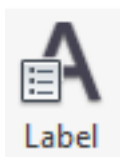
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2- ADD THESE 4 TYPE PARAMETERS

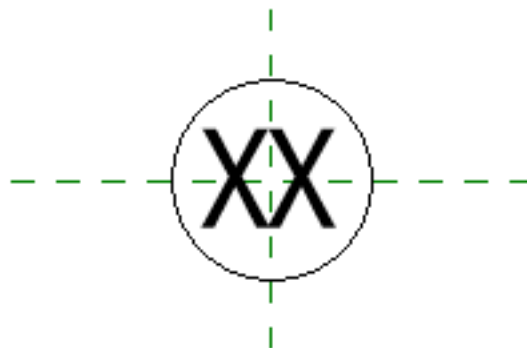
Go to the Generic Annotation type properties and add these 4 parameters. All of them are instance parameters. “Text Visibility” is a Yes/No type parameter that is grouped by Visibility.

Parameter	Value
Text	
Note Number (default)	
Note Text (default)	
View Type (default)	
Visibility	
Text Visibility (default)	<input checked="" type="checkbox"/>

Create a label in the center of the circle. Use the new “Note Number” parameter.



	Parameter Name	Spaces	Prefix	Sample Value
1	Note Number	1		XX



CREATE A LABEL WITH «NOTE NUMBER» PARAMETER



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Add another label next to the bubble symbol. Use the **Note Text** parameter. Then, set the **Text Visibility** parameter to control the visibility of the text. That is used to be able to open and close the label with a single click.

	Parameter Name	Spaces	Prefix	Sample Value
1	Note Text	1		ENTER DESCRIPTI



ADD «NOTE TEXT» PARAMETER

3- USE THE SYMBOL TOOL TO CREATE A NOTE BUBBLE

Go to the Annotation tab and click on Symbol. Select your new generic annotation family and click on the plan to create a note bubble.





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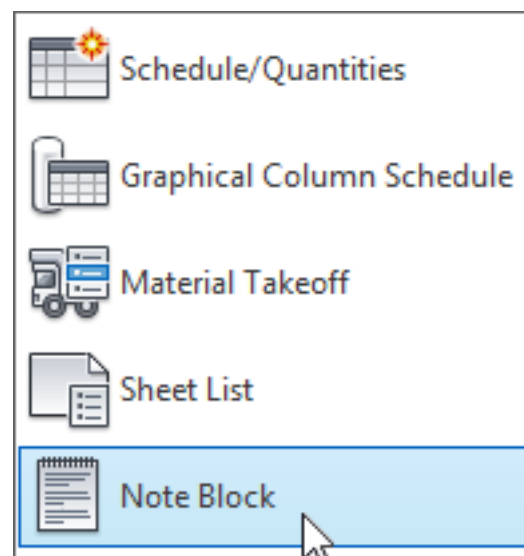
Fill out all the information directly on the view or in the instance properties. Make sure to select a View Type that match the view you are in. In this cas, we select Floor Plan. You can check and uncheck Text Visibility to hide the text description in the view.

Generic Annotations (1)		Edit Type
Text		
Note Number	1	
Note Text	AWESOME WALL	
View Type	Floor Plan	
Visibility		
Text Visibility	<input checked="" type="checkbox"/>	

FILL ALL THE INFORMATION IN THE PROPERTIES

4- CREATE NOTE BLOCK SCHEDULE

In the View tab, click on the schedule and select the **Note Block** tool. Select the new Bubble generic annotation you've just created and type a name.

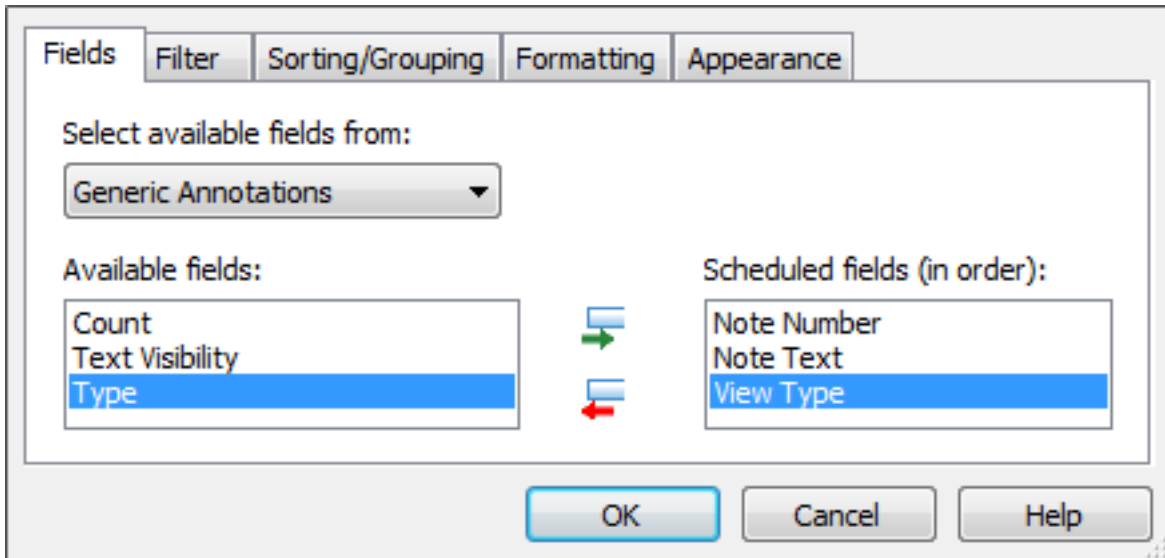




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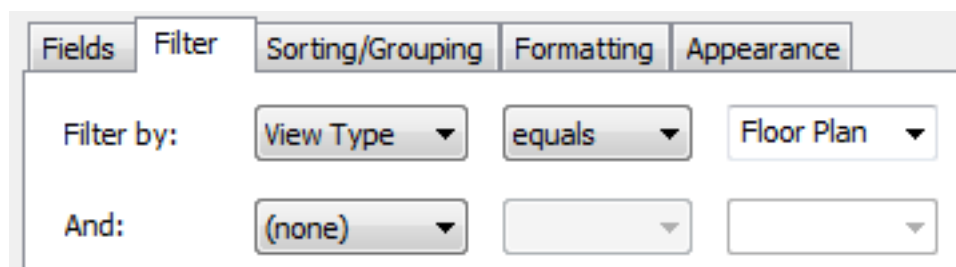
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Add the 3 parameters in the schedule like in the image below.



ADD THESE 3 PARAMETERS

Next, you have to filter the Note Block using the **View Type** parameter. In this case, this specific schedule will be used for Floor Plan notes, so View Type has to equal Floor Plan.



FILTER BY FLOOR PLAN



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Then, go to the **Sorting/Grouping** menu. Sort by **Note Number**. Then, sort by **Note Text**. If you don't do that, the Note Text will disappear in the schedule if you have multiple notes using the same numbers but with different text.

Fields Filter **Sorting/Grouping** Formatting Appearance

Sort by: Note Number ☒ Ascending ☐ Descending

☐ Header ☐ Footer: ☐ Blank line

Then by: Note Text ☒ Ascending ☐ Descending

☐ Header ☐ Footer: ☐ Blank line

☐ Itemize every instance

OK Cancel Help

SORT BY NOTE NUMBER THEN NOTE TEXT UNCHECK ITEMIZE EVERY INSTANCE

The final step is to check the Hidden Field box for View Type in the Formatting menu of the Note Block. We need this field to filter the schedule, but it has to be invisible in the schedule itself.

Fields Filter **Sorting/Grouping** **Formatting** Appearance

Fields:

- Note Number
- Note Text
- View Type**

Field formatting:

☒ Hidden field

Field Format... Conditional Format...

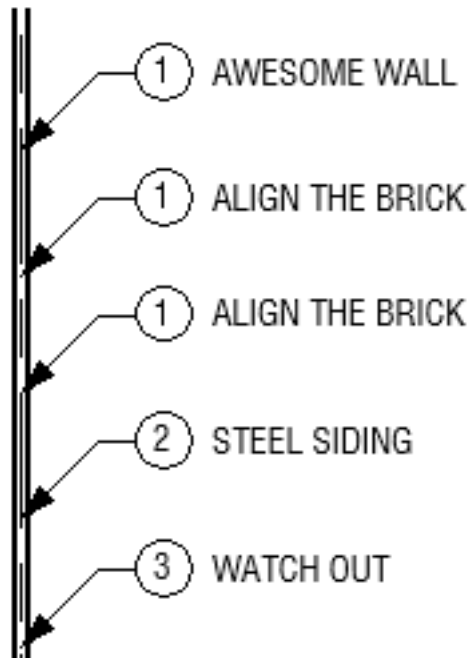


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5- CREATE NOTES AND ADJUST THE SCHEDULE

You can now start creating all the notes for your views. There is a couple things you need to know with these notes. Like you see below, if you have a note that appears multiple times in a project and share the same number and text, the multiple instances will be grouped in the schedule.



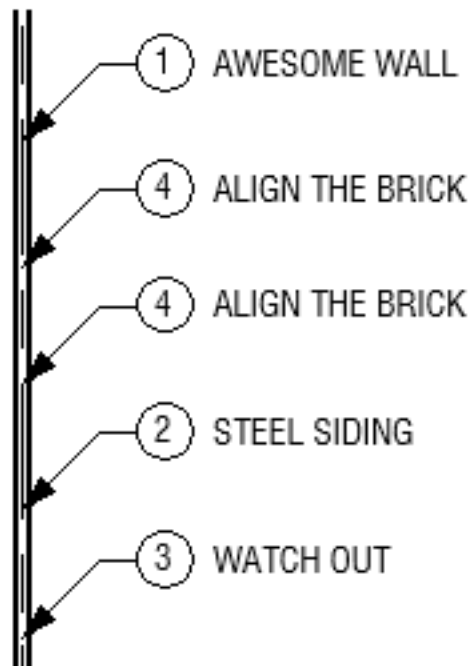
FLOOR PLAN NOTES	
A	B
Note Number	Note Text
1	ALIGN THE BRICK
1	AWESOME WALL
2	STEEL SIDING
3	WATCH OUT



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In the example below, we change the number for note #1 - ALIGN THE BRICK. As you see, all instances of this note number are adjusted. The strength of this note system is that changing numbers and text is extremely fast, easy and efficient. If you realize you have been using the same number for multiple descriptions, it can be fixed instantly.



<FLOOR PLAN NOTES>	
A	B
Note Number	Note Text
1	AWESOME WALL
2	STEEL SIDING
3	WATCH OUT
4	ALIGN THE BRICK

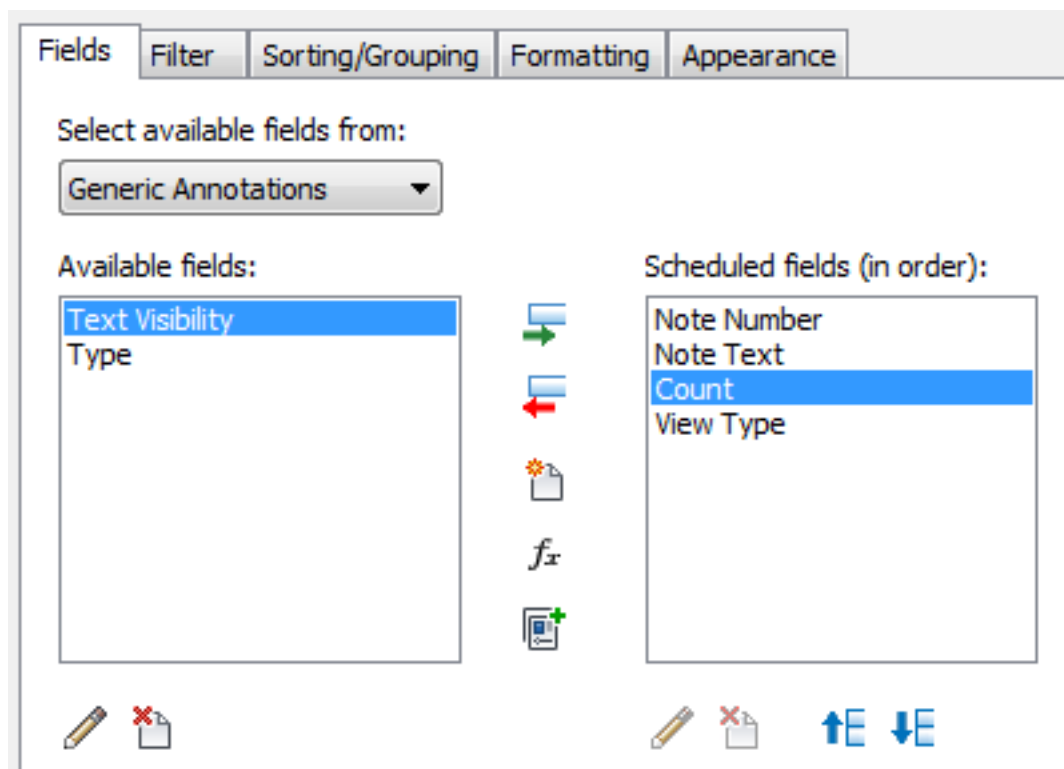


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6- CREATE AN «ALL NOTES» SCHEDULE TO MANAGE

Finally, to keep track of all the notes in the project, create another **Note Block** schedule with the same parameters as the other one, but this time add the **Count** parameter. You can remove the **View Type** filter we used in the other Note Block.



ADD COUNT PARAMETER



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In the **Sorting/Grouping** menu, sort by **View Type** and check the **Header** box. Then, sort by **Note Number** and **Note Text**. Make sure to keep the **Itemize Every Instance** box unchecked.

Fields Filter **Sorting/Grouping** Formatting Appearance

Sort by: View Type ☒ Ascending ☐ Descending

☒ Header ☐ Footer: ☐ Blank line

Then by: Note Number ☒ Ascending ☐ Descending

☐ Header ☐ Footer: ☐ Blank line

Then by: Note Text ☒ Ascending ☐ Descending

☐ Header ☐ Footer: ☐ Blank line

☐ Grand totals:

Custom grand total title

☐ Itemize every instance



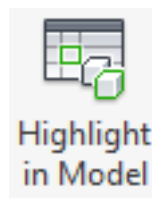
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As you see in the image below, this result in a schedule containing all notes from all view types. It also display the **Count** parameter, which indicate how many instances of each note exist in the project. This schedule is usually not placed in a sheet. It is used internally to keep control over the project.

<ALL NOTES>		
A	B	C
Note Number	Note Text	Count
Elevation		
1	FLASHING 0.5mm	1
2	AUTOMATIC DOORS	2
3	ALUMINUM SIDING	1
Floor Plan		
1	ALIGN THE GYPSUM	1
1	AWESOME WALL	1
2	STEEL SIDING	1
3	WATCH OUT	1
4	ALIGN THE BRICK	2

You can select a note in the schedule and use the **Highlight in Model** tool to show each note in a view.





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CREATE AN EXTERIOR MATERIAL LEGEND

While the plan notes system works great for specific notes, there is an even better technique available to tag exterior materials. You have to create a **Material Tag**, then create a **Material Takeoff** schedule.

CREATE A «MARK» MATERIAL TAG

The first step is simple: create a *Material Tag*. Use the *Mark* parameter in the label. Use the tag in elevations to annotate your exterior materials. You can fill the material mark number you wish to use directly in the tag.

In the example below, we tag the walls and assign mark BR1 to the brick material and WD1 to the wood siding.



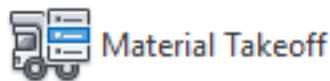


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CREATE A MATERIAL TAKEOFF SCHEDULE

To create the schedule that will be used as a legend, use the **Material Takeoff** type in the schedule sub-menu. Then, add all the parameters like in the image below.



Fields Filter Sorting/Grouping Formatting Appearance

Select available fields from:

Multiple Categories

Available fields:

- Assembly Code
- Assembly Description
- Category
- Comments
- Cost
- Count
- Description
- Manufacturer
- Mark

Scheduled fields (in order):

- Material: Mark
- Material: Name
- Material: Manufacturer
- Material: Model
- Material: Comments
- Material: Description
- Material: URL

Then, add a filter for **Material:Name** containing EXT, or any abbreviation you would like to use.

Fields Filter Sorting/Grouping Formatting Appearance

Filter by: Material: Name contains EXT



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FIT MATERIAL FIELDS WITH DESIRED LEGEND HEADERS

Here is the tricky part: you cannot add new parameters to materials. And you can't rename the existing parameters. In the image below, you can see the material properties and how we map the existing parameters. Make sure to add the **EXT** prefix in the name of your material if you want it to show up in the schedule.

The screenshot shows a material property form with the following fields and annotations:

- Name:** EXT-BR1
- Descriptive Information:**
 - Description:** 90x76x230 (Annotated with **DIMENSIONS**)
 - Class:** Masonry
 - Comments:** RED (Annotated with **COLOR / FINISH**)
 - Keywords:**
- Product Information:**
 - Manufacturer:** BRICK KING
 - Model:** AMBASSADOR
 - Cost:**
 - URL:** 1 (Annotated with **NOTES**)
- Revit Annotation Information:**
 - Keynote:**
 - Mark:** BR1 (Annotated with **TYPE**)



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This is the result once you have filled all the fields. Every time you want to add a new material to this schedule legend, you have to actual add it inside the project. Then you have to make sure the prefix EXT is used in the material name.

EXTERIOR FINISH LEGEND					
A	B	C	D	E	F
TYPE	MANUFACTURER	MODEL	COLOR / FINISH	DIMENSIONS	NOTES
BR1	BRICK KING	AMBASSADOR	RED	90x76x230	1
WD1	QUEEN WOOD	BEVELED 2	DARK BROWN	100x25x1000	2

THANKS FOR READING !

Did you like this Pamphlet? We've got more content for you. The Revit Pure **DESIGN** Package will be released in a few months, probably in June.



DESIGN PACKAGE

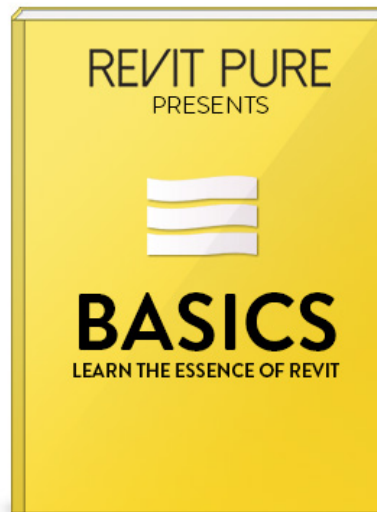
JUNE 2018



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THANKS FOR SUPPORTING BASICS PACKAGE



Almost a year ago I launched the Revit Pure **BASICS** package. The package is a complete success! I am blessed almost every week with emails from people that managed to get rid of CAD and finally learn Revit. A few days ago I received this email from Nick, a BIM manager based in Dallas, Texas:

Just wanted to email to let you know that your learning package rules! I have been searching for a long time to find something that can help with the basics and also keep it simple for the folks in our office that need training in a bit more than the basics. This has made it so simple and easy that I am fairly certain it will be a big hit with some of our employees that constantly ask the simple Revit questions.

How cool is that? Since you are a loyal pamphlet reader, get **15% off** with code **learn**. Check out the package at revitpure.com/basics.