

Revit Project Cover Sheet



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The following information is subject to change.

Overview

There are several procedures required to properly set up a Project Cover Sheet. It is essential that they be completed correctly. Each project is different. There may be project conditions not covered by this document. Contact the Project BIM Coordinator with questions and clarification.

The IDS Revit Architectural Project Model contains one Cover Sheet family, named IDS_Std Cover 30x42, used for all Construction Documents. It has been developed to accommodate multiple configurations for multiple projects within one Revit model. Do not rename the family or load a different Cover Sheet family into the Project Model. Doing so will circumvent the existing predeveloped Cover Sheets and their project sheet phase development.

The A/M/E Project Models has five phases named Existing, New Construction, New Construction (A), New Construction (B), and New Construction (C). The last three phases are placeholders for possible future phases of design. Having multiple project phases in each Project Model is an essential component of the IDS design process. To accommodate multiple projects for a single Revit building model, the IDS_Std Cover 30x42 family has been developed with four family types. Each type correlates to a project design phase. These names may be different depending on the project, but for documentation purposes we will use these family types and phase names.

Family Type	Sheet Phase
• New Construction	New Construction
• New Construction (A)	New Construction (A)
• New Construction (B)	New Construction (B)
• New Construction (C)	New Construction (C)

By having one Construction Document Cover Sheet family, IDS_Std Cover 30x42, with multiple Family Types, only one Cover Sheet family is needed in the Project Model to document each project. If there is another project within the Project Model, the next Family Type is used for these sheets.

Each family type controls the visibility of the text elements that indicates the following:

- Project Design Firms
- Project Name
- Project Number

These text elements overlay each other so that, from within the Project Model, when a sheet is assigned to one Family Type only the information relevant to that Family Type is displayed.

While the project design firms may or may not be the same for all design phases of a project, the project name, and project number are typically different for each project within the model.

This documentation is written for editing the elements associated to the Project Cover Sheet Family Type: New Construction. However, the same procedures can be used to edit the other Cover Sheet Family Types.

Mechanical or Electrical Project Cover Sheet

There is no Cover Sheet in either the Mechanical or Electrical project models. For a Mechanical and/or Electrical project where no Architectural model exists, a Cover Sheet will need to be loaded into the appropriate project model and established for the project.

1. From the *Insert* ribbon, select **Load Family**. The *Load Family* dialog appears.
2. Navigate to the J:\Standards\Corporate\IDS_Covers and Borders\2023 folder. Then select **IDS_Std Cover 30x42.rfa**. Select **Open**. The *Load Family* dialog closes and the family is loaded into the project model.

Cover Sheet Size

As stated previously, in the Architectural Project Model there is one Construction Document Cover Sheet Family, IDS_Std Cover 30x42. However, there are two other Cover Sheet Families, IDS_Std Cover 24x36 and IDS_Std Cover 36x48, available when required that are not loaded into the Project Model. These families have been developed in the same manner as the IDS_Std Cover 30x42 family.

This procedure illustrates how to change the IDS_Std Cover 30x42 family to the IDS_Std Cover 36x48 family.

1. From the Project Model *Project Browser*, expand *Families > Annotation Symbols*. Then, right-click on **IDS_Std Cover 30x42**. From the popup menu, select **Rename**. The family name, *IDS_Std Cover 30x42*, is highlighted for editing in the Project Browser.
2. Rename it to IDS_Std Cover 36x48.
3. Right-click on **IDS_Std Cover 36x48**. From the popup menu, select **Reload**. The Open dialog appears.
 - a. Navigate to the location of the Cover Sheet Family by the exact same name.
Note: The default location of the Revit 2023 Cover Sheet Families is
J:\Standards\Corporate\IDS_Covers and Borders\2023
 - b. Select it, then select **Open**. The *Open* dialog closes, The *Family Already Exists* dialog appears.
 - i. Select **Overwrite the existing version and its parameter values**.

Note: In the Architectural project model, all Cover Sheets in the Project Model will now be the IDS_Std Cover 36x48.

For all sheets that have been predeveloped, the notes and schedules will need to be moved to the appropriate location on the new Cover Sheet.

Edit the Cover Sheet Family

1. From the Project Model *Project Browser*, expand *Families > Annotation Symbols*. Then, right-click on **IDS_Std Cover 30x42**. From the popup menu, select **Edit**. The *Revit Family Editor* opens with the IDS_Std Cover 30x42 family in it.

Project Design Firm, Project Name, and Project Number

Because the Project Design Firms, Project Names, and Project Numbers are overlayed four times, once for each Family Type, you will need to use the following procedure to isolate the text elements designated for the New Construction phase for editing.

1. From the *Create* ribbon, *Properties*, select **Family Types**. The *Family Types* dialog appears.
 - a. From the *Type name* field, verify that **New Construction** is displayed.
 - b. Select **OK**. The *Family Types* dialog closes.
2. From the *View Control Bar*, select **Preview Visibility On**. The Project Design Firms, Project Names, and Project Numbers for the New Construction (A), (B), and (C) phases, as well as other elements, are no longer visible.
3. Modify the Project Design Firm, Project Name, and Project Number text as needed for the project.
4. From the *View Control Bar*, select **Preview Visibility Off**. All element that were previously not visible are now visible.

Do not delete the text that represents the Project Design Firms, Project Names, and Project Numbers of the other phases. Doing so will eliminate their use for future projects within the Project Model.

Client Logo

An area for the Client Logo has been designated, by the words Client Logo in a box, within the Project Title area of the Cover Sheet. Import and place an image for the client in this area.

1. From the *Insert* ribbon, select **Import Image**. The *Import Image* dialog appears.
2. Navigate to the location of the image. Select the image, then select **Open**. The *Import Image* dialog closes and an image preview indicator appears on the Revit screen as a dashed X.
3. Place the image to the right of the Cover Sheet near the Client Logo area. The image appears.
4. With the image selected, from the *Modify | Raster Images* ribbon, select **Move**.

5. To change the image size, snap to the upper right corner of the image. Then move the image snapping to the upper right corner of the Client Logo box.
6. With the image selected, select the lower left corner of the image, and drag it to either the bottom or left line of the Client Logo box. It may not snap to the line, so position it the best you can to align with the line.
7. Once the image is in place, select the Client Logo text and the box, from the *Modify* ribbon, select **Delete**.

Client Name and Project Address

The Client Name and Project Address are Project parameters. Their values are set within the project, not the Cover Sheet family.

North Arrow

The North Arrow is a nested generic annotation family in the Cover Sheet family. Typically, the North Arrow points up. However, when it needs to point in a different direction, select the North Arrow and use the Rotate function to rotate it as needed while keeping the center of the North Arrow in place.

1. Select the North Arrow family. From the *Modify | Generic Annotation* ribbon, select **Rotate**.
2. From the *Options* bar, deselect **Copy**.
3. Maintain the center of rotation on the North Arrow, then rotation the family as needed.

Saving the Cover Sheet to Autodesk Construction Cloud (ACC)

BIM 360 has been rebranded as Autodesk Construction Cloud (ACC)

All Revit models and AutoCAD drawings relevant to the project are to be maintained on ACC. The project Border family should also be maintained on the project ACC in the Border subfolder. If there is no Border subfolder for the project, contact the BIM Coordinator to create it.

1. From the *File* tab dropdown, select **Save As > Family**. The Save As dialog appears.
 - a. From the *Save in* drop-list, select **This PC > Autodesk Docs > Integrated Design Solutions**.
 - b. From the *Name* list of Client, double-click the **Client Project**. Then, double-click **Project Files**.
 - i. The Building Name should be listed. Double-click the **Building Name**. Navigate to and open the **Border** folder.
 - ii. Verify that the *File name* remains IDS_Std Cover 30x42.rfa. Then select **Save**. The Save As dialog closes.

Loading the Updated Cover Sheet Family into the Project Model

1. With the Project Model open in the same session of Revit, from the Family Editor *Create or Modify* ribbon, *Family Editor* area, select **Load into Project and Close**. The *Family Already Exists* dialog appears.
 - a. Select **Overwrite the existing version and its parameter values**. The *Noneditable Family* dialog appears.
 - b. Select **Yes**. The *Noneditable Family* dialog closes and the Cover Sheet in the Project Model is updated with the one saved within the ACC Project Border folder.

Finalizing the Project Cover Sheet in the Project Model

Establish the Project Data for the Project Cover Sheet

As stated previously, the Client Name and Project Address are Project parameters. This procedure will establish this parameter values as well as the Project Administrator, Project Architect, Q.M. Reviewer, and Approver.

The values entered for these parameters are displayed on all relevant sheets regardless of the Project Phase.

Note: This may have been completed during the Revit Project Cover Sheet procedure.

1. From the Project Model, *Manage, Settings* area, select **Project Information**. The *Project Information* dialog appears.
2. From the *Other* area, for the **Client Name**, enter the appropriate value.
3. For the **Project Address**, from the *Value* column, select in the field the states "**Enter address here**". You can't actually enter a value directly in this field. To the right of the text, the *Ellipses* appears. Select the **Ellipses**. The *Edit Text* dialog appears.
 - a. Enter the appropriate value for the address. Then select **OK**. The *Edit Text* dialog closes.
4. Enter the appropriate values for the **Project Administrator**, **Project Architect**, **Q.M. Reviewer**, and **Approver**.
5. Select **OK**. The *Project Information* dialog closes and the Cover Sheet is updated with the Client Name and Project Address. The Project Cover Sheet is updated with the data entered.

Creating a Mechanical or Electrical Project Cover Sheet

As previously stated, there is no Cover Sheet in either the Mechanical or Electrical project models. For projects where there is no Architectural project model, a sheet will need to be created in one of these project models and the Cover Sheet family applied to it.

1. From the *Project Browser*, right-click on **Sheets (Sheet Folders)**. From the pop-up list, select **New Sheet...** The *New Sheet* dialog appears.
2. Select **IDS_Std Cover 30x42 : New Construction**. Then select **OK**. The *New Sheet* dialog closes and the Cover Sheet appears in the Revit Design window.
3. From the *Properties* palette, from the *Sheet Folder* parameter dropdown list, select **Construction**.
 - a. From the *Sheet Phase* parameter dropdown list, select the appropriate value.
 - b. From the *Sheet Number* parameter, enter **COVER**.
 - c. From the *Sheet Name* parameter, enter **Cover**.

Note: Leave the Dept Code parameter blank. Cover Sheets do not have a value for the Dept Code.

4. Place the appropriate Sheet List schedules on the Cover Sheet.

Re-edit the Cover Sheet Family

Use this procedure to re-edit the Cover Sheet Family.

1. From the *File* tab dropdown, select **Open > Family**. The *Open* dialog appears.
2. From the *Look in* dropdown list, select **This PC**.
3. From the list, double-click on **Autodesk Docs**.
4. From the list of files and folders, there may be more than one design firm listed. Double-click on the appropriate one, e.g., **Integrated Design Solutions**. A list of ACC clients appears in the list of files and folders.
5. Double-click on the appropriate one. The *Project Files* folder appears in the list of files and folders.
6. Double-click on the **Project Files** folder. One or more building folders appear in the list of files and folders.
7. Navigate to the *Borders* folder. Then, select **IDS_Std Cover 30x42.rfa**. The *IDS_Std Cover 30x42.rfa* opens.
8. Make any modifications necessary to the Cover Sheet.
9. From the *File* tab dropdown, select **Save**.
10. From the *Modify* ribbon, select **Load into Project and Close**. The *Family Already Exists* dialog appears.
11. Select **Overwrite the existing version and its parameter values**. The *Noneditable Family* dialog appears.
12. Select **Yes**. The *Noneditable Family* dialog closes and the Cover Sheet in the project is updated with the one on ACC.