

# How to Save a Revit Family



The following information is subject to change.

## Overview

Use this procedure when saving a newly created family or when saving an existing family that has been updated. This procedure will set the view up as the thumbnail preview and ensure that the families file size is as small as possible.

1. Open either a *3D* or *Floor Plan* view.
2. Use **Visibility Graphics** to turn off dimensions, reference planes, etc. within the view.
3. If there are any other unwanted elements visible, select them then use **Hide Elements**.
4. One-by-one, select each 3D element.
  - a. From the *Properties* pallet, verify that any **Materials** listed are set to *<By Category>*. Take note of any that are set to a specific material other than *<By Category>*.
5. From the *Create* ribbon, select **Family Type**. The *Family Type* dialog appears.
  - a. See if there is a *Materials and Finishes* category. If there is, take note of the material applied.
6. From the *Manage* ribbon, select **Materials**. The *Materials Browser* dialog appears.
  - a. One-by-one, select a material, right-click and select **Delete**. If there were any entries listed from step 5.a., do not delete the material.
  - b. Select **OK**. The *Materials Browser* dialog closes.
7. From the *Manage* ribbon, select **Purge Unused**. The *Purge Unused* dialog appears.
  - a. Select **OK**.
8. Repeat step 7 until all elements have been purged from the family.
9. From the *File* ribbon, select **Options**. The *Options* dialog appears.
  - a. From the list on the left, select **Graphics**.
    - i. From the *Colors* area, select **Background**. The *Colors* dialog appears.
      1. Select **white** from the list of colors.
      2. Select **OK**. The *Colors* dialog closes.
    - ii. From the *Options* dialog, select **OK**. The *Options* dialog closes.
10. From the *File* ribbon, select **Save As > Family**. The *Save As* dialog appears.
  - a. Navigate to the location where the family is to be saved.
  - b. From the lower-right corner of the *Save As* dialog, select **Options**. The *File Save Options* dialog appears.
    - i. From the *Thumbnail Preview > Source* dropdown, select **Active view/sheet**.
    - ii. Select **Regenerate if view/sheet is not up-to-date**. Then select **OK**. The *File Save Options* dialog closes.
  - c. If the family already exists in the folder you navigated to in step 9.a., the file name listed in the *File Name* field should be changed by adding a suffix of 1. This will create a new family, in most cases, with a smaller file size than the original family.
  - d. Select **Save**. The *Save As* dialog closes.
11. Close the family in Revit.
12. If you performed step 10.c. then, from *Windows Explorer*, navigate to the location where the family is to be saved.
  - a. Select the original family and delete it.
  - b. Select the newly created family and rename it by removing the suffix 1.
13. Use *Windows Explorer* to delete any family backup files. They will have a suffix beginning as .0001.rfa, .0002.rfa, etc.