

Setting up Keynotes

The purpose of keynotes is to reduce the clutter of text on plan views. From demolition to new work sheets, there are different keynotes for each mechanical discipline, all with varying annotation tags.

Note that for each phase in the model there are separate keynote families, with individual types, for demolition and all the new construction work sets. **IDS_Anno – Keynote** and **IDS_Anno – Keynote (A)/(B)/(C)**.



IDS_Anno - Keynote	IDS_Anno - Keynote (A)
D1	D1
F1	F1
G1	G1
H1	H1
M1	M1
P1	P1
S1	S1

The letters designation for the keynotes and associated types shown above are illustrated below.

Demolition – “D”

Mechanical – “M”

Sheet Metal – “S”

HVAC Piping – “H”

Plumbing – “P”

Fire Protection – “F”

Medical Gas – “G”

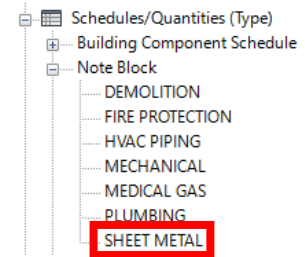
This procedure illustrates how you add keynotes to your **sheet metal** drawings. However, this same procedure can be followed for any other mechanical discipline.

1. Open the **sheet metal** drawing you plan to add keynotes to.
2. In the upper right-hand corner, you will see this alignment tool. Match this placement for all your sheets. (Keynote schedules can be copied and pasted from sheet to sheet).



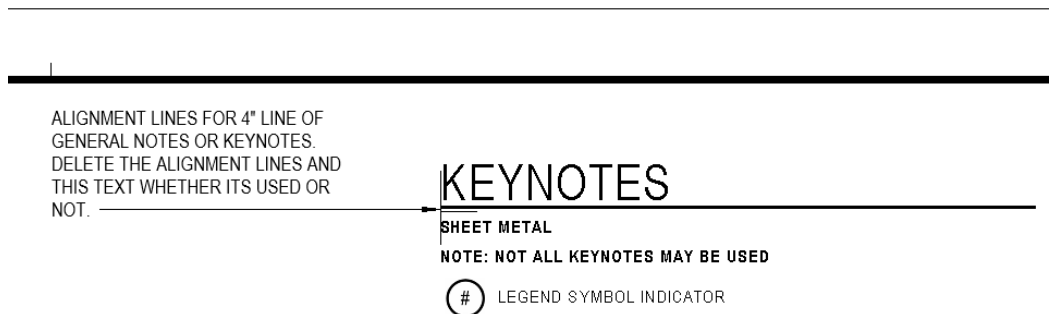
Setting up Keynotes

3. In the *Project Browser*, from the *Schedules/Quantities (Type)* you will see the **Note Block** category. For sheet metal drawings you will use the associated **SHEET METAL** note block.



4. You will then click and hold the associated “**SHEET METAL**” note block and drag it onto your sheet.
5. Once it is on your sheet, drag and align the note block to the annotation tool that was added to each view in the project to add “alignment” from sheet to sheet of the keynotes position. See step two of this procedure.

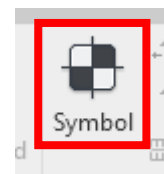
Note: If you have *General notes* on your sheet, they are placed above the keynotes.



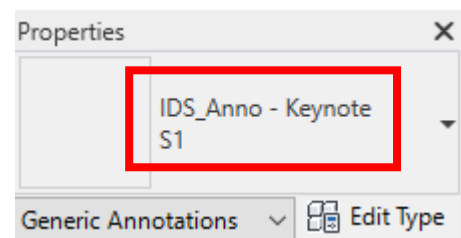
6. Once the *keynote note block* is added. You can then select the alignment note and delete it from the sheet.
7. After that, select the *keynote note block* on the sheet and pin it in place.



8. Next we can begin adding keynotes annotations to the sheet. From the *Annotate* ribbon, select **Symbol**.

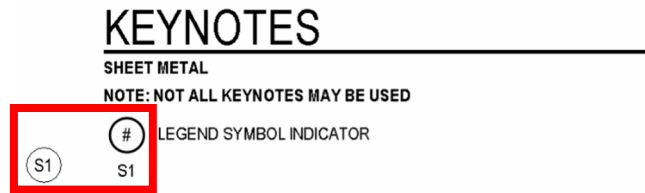


9. From the *Properties Browser*, click the drop-down menu and select the **IDS_Anno – Keynote, S1**.

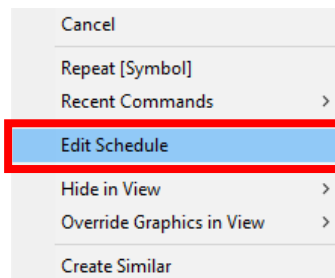


10. Once selected, click anywhere on your sheet. You will then see an **S1** keynote annotation populate on your view, simultaneously populating an **S1** on your *keynote note block*.

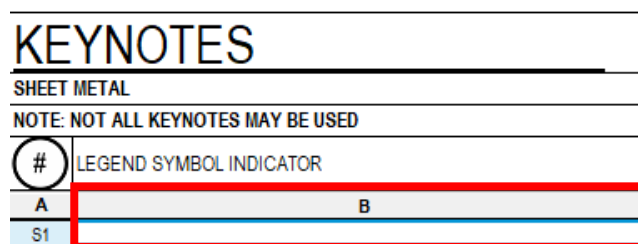
Setting up Keynotes



11. Next, there are three ways to activate the note block to edit and add text. One way is to right click, and press **Edit Schedule** as shown below. Another way is to double click the keynote **Note Block**, then the following window will populate as shown below in step 12. The last way is to press edit type in your *Properties* menu illustrated in step 18 below.

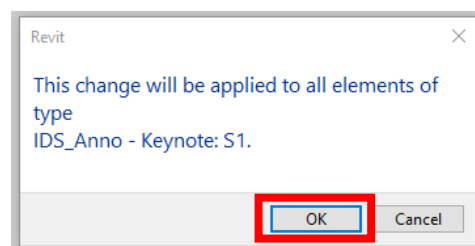


12. You will then select column B to add your text specific to **S1**.

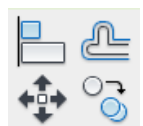


13. After you are done adding your note, press enter on your keyboard. This *Revit* pop up will come up on your screen. You can press "OK" or simply press enter again.

Note: This alert is simply letting you know that you have made a change that will apply to **S1**.

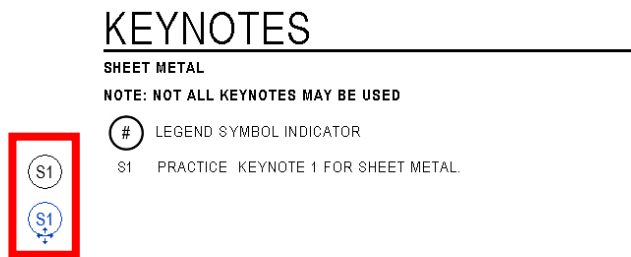


14. Once you have finished the associated steps above, adding keynote **S1**. We can then begin the steps of creating additional keynotes.
15. For this procedure I will show you how to create **S2**. You can then follow these steps again to create any many keynotes you wish to have on your sheet.

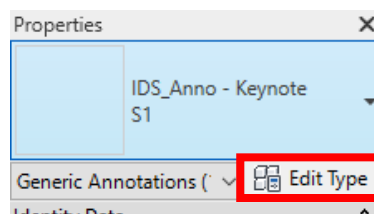


Setting up Keynotes

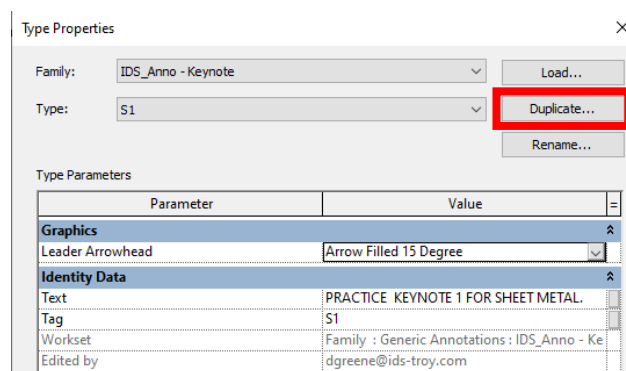
16. To begin, on your view, select the **S1** keynote annotation and copy it to have two on your sheet.



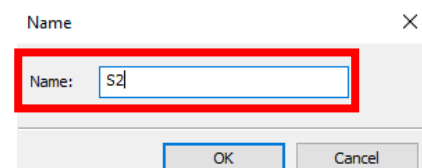
17. Once selected, head over to the *Properties browser* and select **Edit Type**.



18. Then the *Type Properties* of that keynote **S1** will come up. You will then click **Duplicate**. Note that during this step you can also update the text for that keynote.



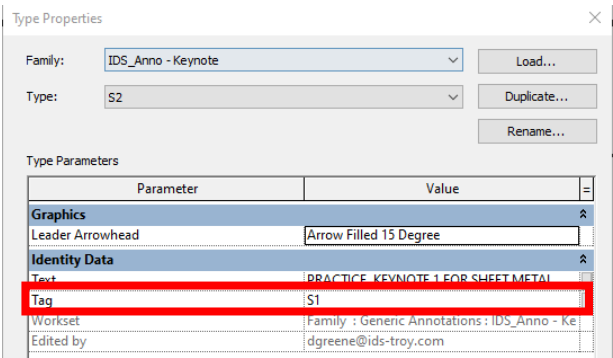
19. Rename the duplicated "S1 2" to your next keynote, **S2**.



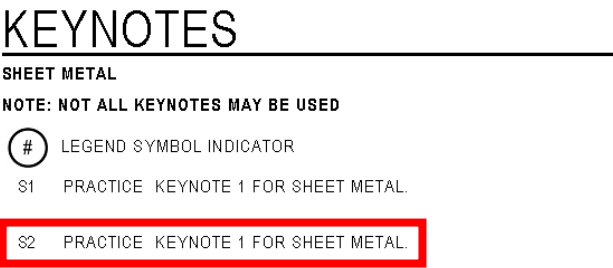
Setting up Keynotes



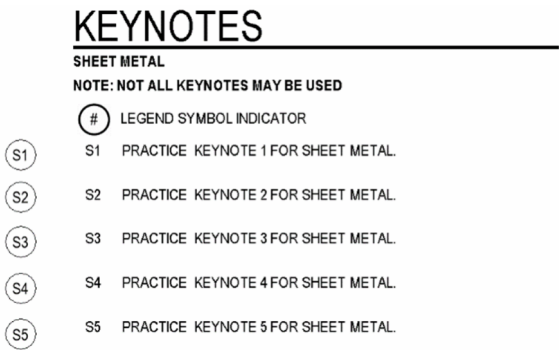
20. You need to then change the **Tag** from S1 to S2 to match the **Type**. Simply click here and rename to **S2**. Then press OK in the lower right-hand corner of the *Type Properties* tab you are working in.



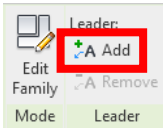
21. Then you can see in the *keynote note block*, a populated **S2** keynote with the same note from that of **S1**.



22. Follow **steps 11-12** of this procedure to alter the note of **S2**.
23. Repeat this procedure for every sheet you need keynotes for. Add as many keynotes as needed.



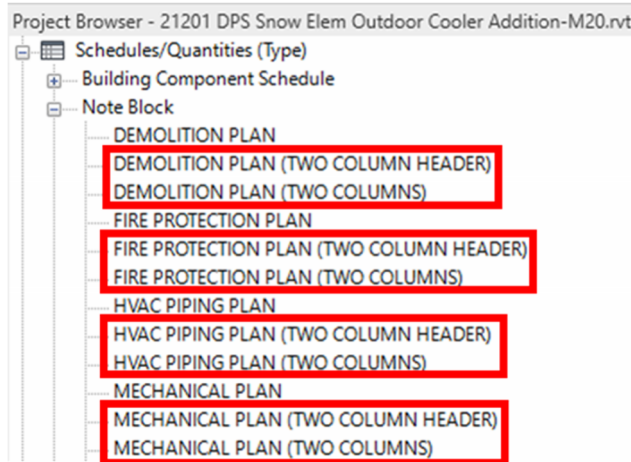
Note: To add a leader, select the Keynote on the sheet and press **Add** under the *Modify/Generic Annotation* tab.



Setting up Keynotes

24. The following steps are used only if you have several keynotes that end up overlapping your plans due the length of the single column. In the updated mechanical template, there are several **Note Blocks** for each discipline with the option to have Two Columns.

Note: When we transitioned to this multiply columns or more option, the header and columns ended up becoming separate *Note Blocks* so that each of the columns do not have a header, just the furthest left column.



25. Placing these individual *Note Blocks* on your sheets are very similar to steps 3 through 8 above with some minor changes.
26. First drag the **SHEET METAL PLAN (TWO COLUMN HEADER)** on to your sheet.

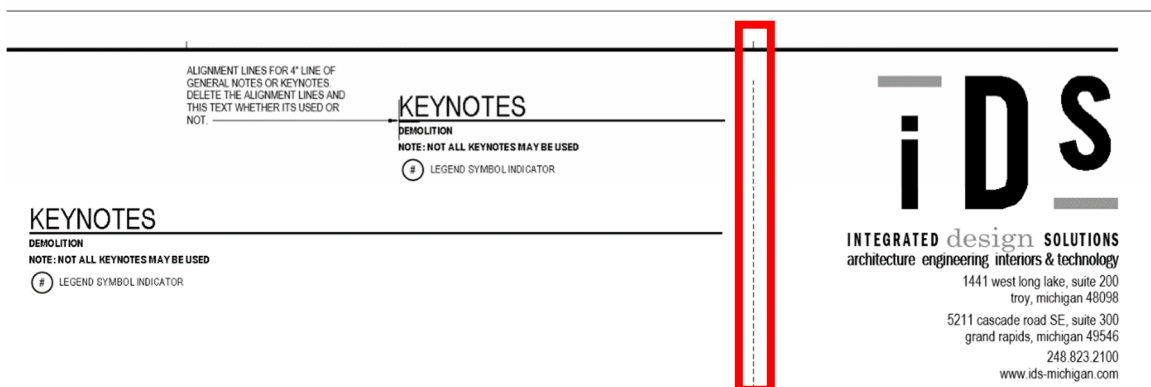
KEYNOTES

PLUMBING

NOTE: NOT ALL KEYNOTES MAY BE USED

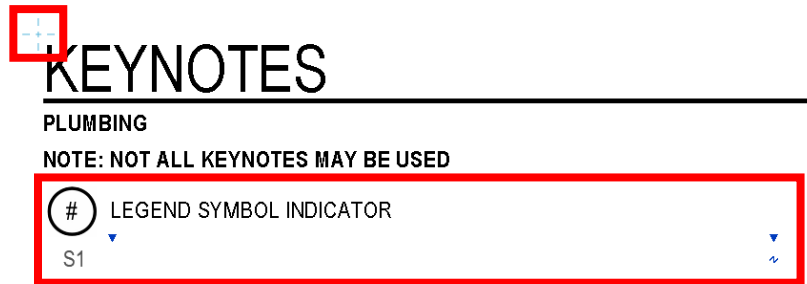
LEGEND SYMBOL INDICATOR

27. Align the new two-column header with the standard keynote **Note Block**, right justified as well as horizontally. Note that you cannot go beyond the hidden line to the right as shown below designated from the tick at the top right of the sheet.



Setting up Keynotes

28. Next you must bring over the second half of the Note Block, **SHEET METAL PLAN (TWO COLUMNS)** to complete the note block with the Header. Drag the **Note Block** over from the *Project Browser* and before placing it on the sheet, you will note that you can align that **Note Block** with the Header as shown below. Once you see the blue alignment in the top left corner you can finish placing the block.



29. After placing these on your sheets that require two columns, pin them in place as outlined in step 7 above.
30. Note that if your sheets allow the single column **Note Block**, you should be using that as your first option. It is acceptable to have sheets that have some double columns while others maintain the single option. There is no need to have one or the other for all your sheets.