

☰ View Templates/Filters, Revit

This is mostly a personal reference, which is currently viewable to others with a link. It is EVOLVING and NOT the only way to do things and is not necessarily grammatically correct.

Related docs:

☰ Revit Tips /Tricks ;

Video Snippets (highly recommended) gain better understanding

☰ View Filter / Template Deeper Knowledge ☰ View Templates/Filters, Revit ☰ Filters (trick & general), Revit

WORKING ON CURRENTLY

Adjusting filters to control View callouts/tags (Section/Callout/Elevation/Detail) show

Using shared/project parameters to hide instances - working thoughts in another doc.

- ☰ thinking Filters to CTRL views show up in views, Revit

Visibility/Graphics Overrides (per view controls)

Note: Global controls (per project) are controlled via Object Styles (more to come)

These can be controlled in two or three ways.

- Element or category overrides (right click selected objs override element or category)
- Visibility/Graphics Overrides ([VV] or [VG] >Graphics>Visibility/Graphics)
 - Then adjust different categories¹
 - Also consider filters²
- View template - like Visibility/Graphics Overrides but can be applied to multiple view and can be put in templates.
 - Then adjust different categories¹
 - Also consider filters²

1 Visibility/Graphic Overrides for Legend: _template updates

Model Categories Annotation Categories Imported Categories Filters Design Options

View Templates

Are nice as you can apply them to several views to repeatedly get the same results without reassigning values you desire. For ex. a Int Elevation template can be applied to all interior elevations

Filters give more control (and typ better than View Graphics Overrides)

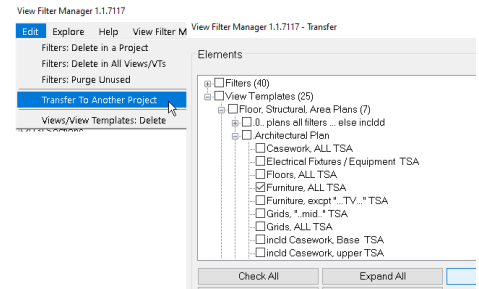
Filter can specific walls based on different criteria/parameters (params) like type name instead of all walls. You can also add params. to specific family categories to delineate even more. It is also easier to trouble shoot/find what you have modified in the filter tab than in the Model or Annotation.

What adds capability to filters is adding project (shared) params. This can create specific yes/no (& other params, instance or type) to diff family categories. For example you can create a incld in FFE and apply it to furniture, generic models, specialty families and other fam cats that might need it as an instance. Then you can check all the items that you want hidden without in a FFE situation. Then create a filter that uses the incld para. Turning off all furniture beside those not checked (like TVs)

Transfer (b/w projects) View Templates / Filters (& parameters within the filters)

Easiest way (but \$90 one time):

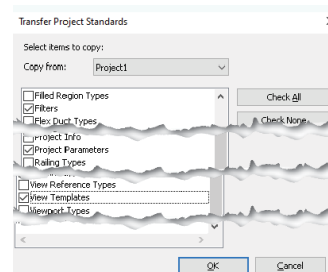
- View Filter Manager (VFM)*. CAN selectively choose spec filters/templates (and parameters) or all filters/templates. VFM can also transfer and chg order b/w templates and views in same project.
- Open the projects you want to transfer from and to
 - In the project you want to transfer from
 - View Filter Manager >Edit>Transfer To Another Project
 - Select the View Templates or Filters and the project(s) you would like to transfer to
 - Click transfer



* View Filter Manager by "Artejon" Andrzej Jez (@ autodesk app store; [here](#))

Free, but more work

- Next easiest way; requires an awesome free add-in [PyRevit Revit Plugin](#) (need to vfy: if it transfers filters/parameters;)
 - pyRevit> views> copy view templates to open docs
- Least easy way; **NO ADD-INS** (need to vfy: don't think it transfers the filters/parameters;)
 - Open the file you want the templates or filters within (and the other file that has the desired templates/filters). >Manage>Transfer Project Standards> select: Filters, Project Parameters (inclds shared) and View templates. NOT A SELECTIVE PROCESS so then you either delete the excess or have bloat in your project



Objects NOT (normally) filterable

Certain objects are not directly filterable; list currently understood:

- Lines, Color Schemes, Plan Regions; sections, grids; wall sweeps

	A work around is to SAVE a selection set - select more than one object > save, edit, load selection options become available. Clicking save will create selection available for loading or adding to a view/ view templates. more on selection sets here For example, for making a filter for wall sweeps (I like to use them as baseboards, NOT cornerboards or window trim). right click a sweep >> select all instances >in entire project. Edit later to add or subtract more. Then you can add them to view template to control visibility (for example to turn them off in plans if desired)
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