

CHECKLIST

Revit family development checklist

Build families that are light, correct and a pleasure to use.

A good family loads quickly, flexes without breaking, schedules correctly and looks right at every level of detail. A poor one slows a whole model. Use this checklist as a quality gate before a family is released.

PROJECT

PREPARED BY

DATE

1. Plan the family

- ☐ Purpose and users defined: designers, contractors or manufacturers
- ☐ Correct category and host (wall, floor, ceiling, face-based or standalone)
- ☐ Level of Development and detail needed, with the lightest geometry that meets it
- ☐ List of parameters, and which must be type and which instance
- ☐ Naming convention for the family, types and parameters agreed

2. Geometry

- ☐ Reference planes and parametric constraints set up before geometry is drawn
- ☐ Dimensions labeled with parameters and locked where appropriate
- ☐ Geometry kept as simple as the use allows; no unnecessary curves or imported solids
- ☐ Nested families used only where they save effort, and shared only where needed
- ☐ Family flexed at its minimum, maximum and typical sizes without errors

3. Detail levels and symbols

- ☐ Coarse, medium and fine detail levels set up with sensible visibility
- ☐ 2D symbolic lines used in plan and elevation where the standard calls for them
- ☐ Visibility settings tested in plan, section, elevation and 3D
- ☐ Cut geometry and fill patterns behave correctly in section

4. MEP data (if applicable)

- ☐ Connectors added with the correct type, size, shape and flow direction
- ☐ Connector parameters linked to size parameters
- ☐ System classification and flow or electrical data set
- ☐ Family tested connecting to ducts, pipes or conduit

5. Parameters and data

- ☐ Shared parameters used where schedules or tags need them
- ☐ Identity data completed: manufacturer, model, description, URL, assembly or classification code
- ☐ Material parameters assigned so finishes can change
- ☐ Units and formats consistent and clearly labeled
- ☐ Type catalog or types created for every product variant

6. File quality

- ☐ Unused parameters, materials, line patterns and imported CAD purged
- ☐ File size reasonable for the geometry it holds
- ☐ Correct Revit version saved, and any earlier versions listed
- ☐ Family preview image set
- ☐ No warnings when the family is opened or loaded

7. Testing and release

- ☐ Loaded into a clean test project and placed several times
- ☐ Scheduled, tagged and dimensioned without problems
- ☐ Opened in a project with other families to check for conflicts
- ☐ Documentation supplied: parameter list, variants and any usage notes
- ☐ Version recorded and the release approved by a second person

Manufacturers: ask us to apply this checklist to your product range. We build the library, test it in a sample project and hand over the parameter guide.

NOTES