

Creating and Using a Plan Template

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The information in this article applies to:



QUESTION

I have a number of different architectural design styles that I often use and would rather not have to set up my default settings every time I begin a new plan that will use one of these styles. How can I do this work once and save it for future use?


ANSWER

In Chief Architect, any time you open a new, blank plan, its initial default settings are copied from a template. You can create your own custom template plans to reflect the architectural styles and materials that you use most often.

A template plan is essentially a blank plan with default settings customized to meet a particular set of design needs. You may find it helpful to create more than one template, each set up to draw a particular architectural style. It's a good idea to save all your templates in a particular location, such as a folder in Documents or in the Chief Architect Templates directory.

If migrating forward to the current version of Chief Architect from an older version, please make sure to follow the instructions in the Migration Guide located in your Digital Locker.

While it's a good idea to go through all of the defaults to make sure the template is setup exactly how you need it, there are some defaults that are more critical to change ahead of time, as they can be troublesome to change after the design is complete. It's recommended that these "Critical Defaults" are set up in the template and reviewed before starting any plan.

Begin by selecting **File> New Plan**  from the menu to open a new, blank plan using the default plan template.

Critical Defaults:

- [Floor and Ceiling Structure Defaults](#)
- [Floor and Ceiling Height Defaults](#)
- [Framing Defaults](#)
- [Wall Type Defaults](#)
- [Dimension Defaults](#)

All default settings are important. It's always a good idea to form a habit of setting the defaults for an item prior to placing them in the plan.


You can also set up layer sets in your template file. A layer set consists of a complete list of the layers in the current plan or layout along with the display settings for each layer as set for a particular type of view or purpose. These display settings can be modified and can be different for each layer set. Please see the [Related Articles](#) section below for more more information on layer sets.

Saving:

- [Saving the Template](#)
- [Setting the Default Template](#)

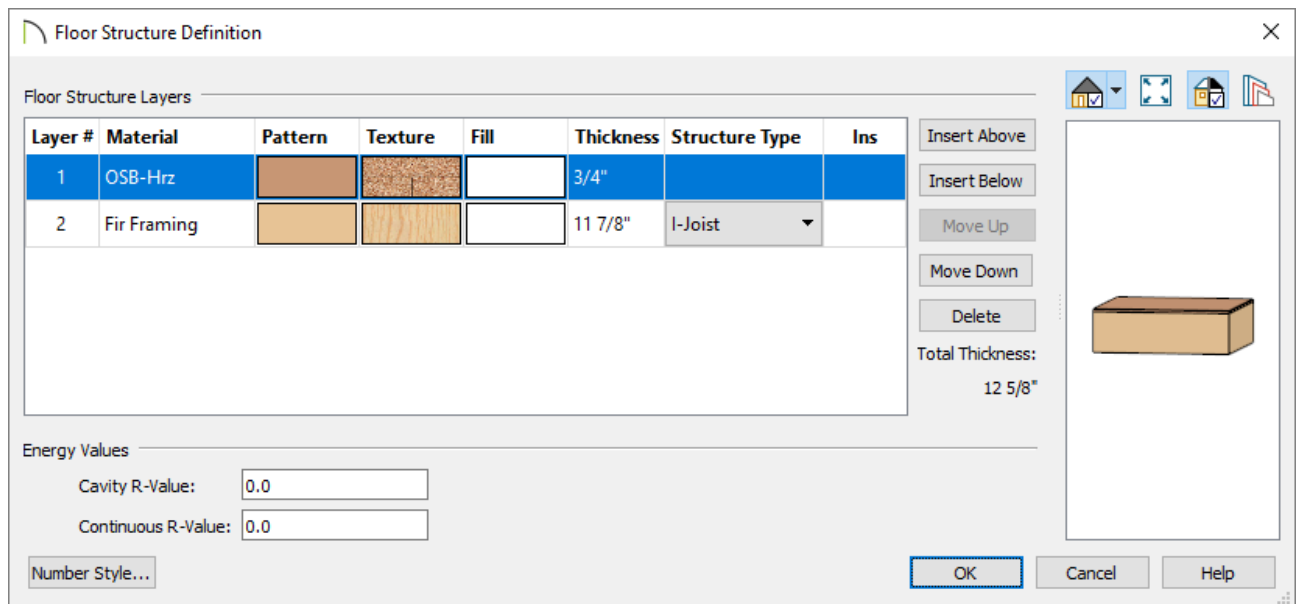
Floor and Ceiling Structure Defaults

The floor and ceiling Structure defaults consist of the layers that make up the floor and ceiling platforms. For example the floor joists and sheathing or the ceiling joists. This is also where the Floor and ceiling finishes are set.

1. Select **Edit> Default Settings**  from the menu to open the **Default Settings** dialog.
2. Expand the list for **Floors and Rooms**, select **Floor/Ceiling Platform**, and click **Edit**.

Note: Alternatively, Floor and Ceiling structure settings can be adjusted on a per-floor basis by expanding the Floors and Rooms category, expanding Floor Levels, selecting the floor level you'd like to change, and then clicking on the Edit button. In the Floor defaults dialog that appears, click on the Edit button located beside each of the platform settings to modify them.

3. In the **Floor/Ceiling Platform Defaults** dialog, choose which platform settings to modify and then click the **Edit** button.
 - **Ceiling Structure** typically contains just a layer for ceiling joists
 - **Ceiling Finish** typically contains a layer for the drywall and a layer for the paint color.
 - **Floor Finish** typically contains a layer for the floor finish as well as any layers for underlayment.
 - **Floor Structure** typically contains a layer for the floor sheathing and a layer for the floor joists.
4. In this example, the Floor Structure Edit button is clicked and in the **Floor Structure Definition** dialog, the Layers, Materials, Energy Values and a diagram of the floor structure is displayed.



- Layers are numbered and listed from the top of the structure to its bottom.
- To select a layer for editing, click on the layer to highlight it, and then click once again in the box you'd like to modify.


For example, if you're wanting to change the material of a layer to something different, click on the material name for a selected layer. In the image above, you would want to click on the words: **OSB-Hrz**. To adjust the thickness, click on the **3/4"** value specified for Layer #1.

- Use the **Insert Above/Below** buttons to add additional layers, use the **Move Up/Down** buttons to move layers up or down, and use the **Delete** button to delete selected layers.
- Specify the **Energy Values** of the selected Floor or Ceiling Structure if desired.
 - Specify the structure's Cavity R-Value, which is the R-value of its cavity insulator: most commonly, the insulation between wood or metal joists.
 - Specify the Continuous R-Value, which is the R-value of continuous insulators such as rigid foam sheets.
- Once all desired changes have been made, click **OK**.

Floor and Ceiling Height Defaults

Many important default values that affect rooms are specified in the Floor Defaults dialog for each floor in a plan. This dialog controls important information that the program uses to create a 3D model - particularly floor and ceiling heights and materials. Moldings can also be specified in the Floor Defaults dialog.

Only the defaults for the first floor of a building can be set ahead of time. The program uses the setting from the first floor to create subsequent floors. When a new floor is created, its floor defaults are displayed and can be changed at that time.

1. Select **Edit> Default Settings**  from the menu to open the **Default Settings** dialog.
2. Expand the list for **Floors and Rooms**, expand **Floor Levels**, click on the **1** listed here representing the first floor, and then click **Edit**.
3. On the **STRUCTURE** panel of the **Floor 1 Defaults** dialog, specify the default **Ceiling** height for Floor 1.
 - Ceiling and Rough Ceiling represent framing dimensions from the bottom of the wall bottom plate to the top of the wall top plate.
 - The default Floor Height for Floor 1 is set at 0".

Note: Chief Architect always defines the default height of Floor 1 at 0'-0". This height value is measured from the top of the subfloor and is the constant by which the heights of structural elements in the program like walls, floors, and ceilings are measured. The heights of architectural objects can be measured relative to this absolute height, as well. As such, this default cannot be changed.

- Finished Ceiling represents the dimension between the the floor finish and the ceiling finish.

Floor 1 Defaults

Structure
Moldings
Fill Style
Materials

Absolute Elevations

Floor Above: 114 5/8"
Ceiling: 109 1/8"
Floor: 0"
Floor Below: 0"

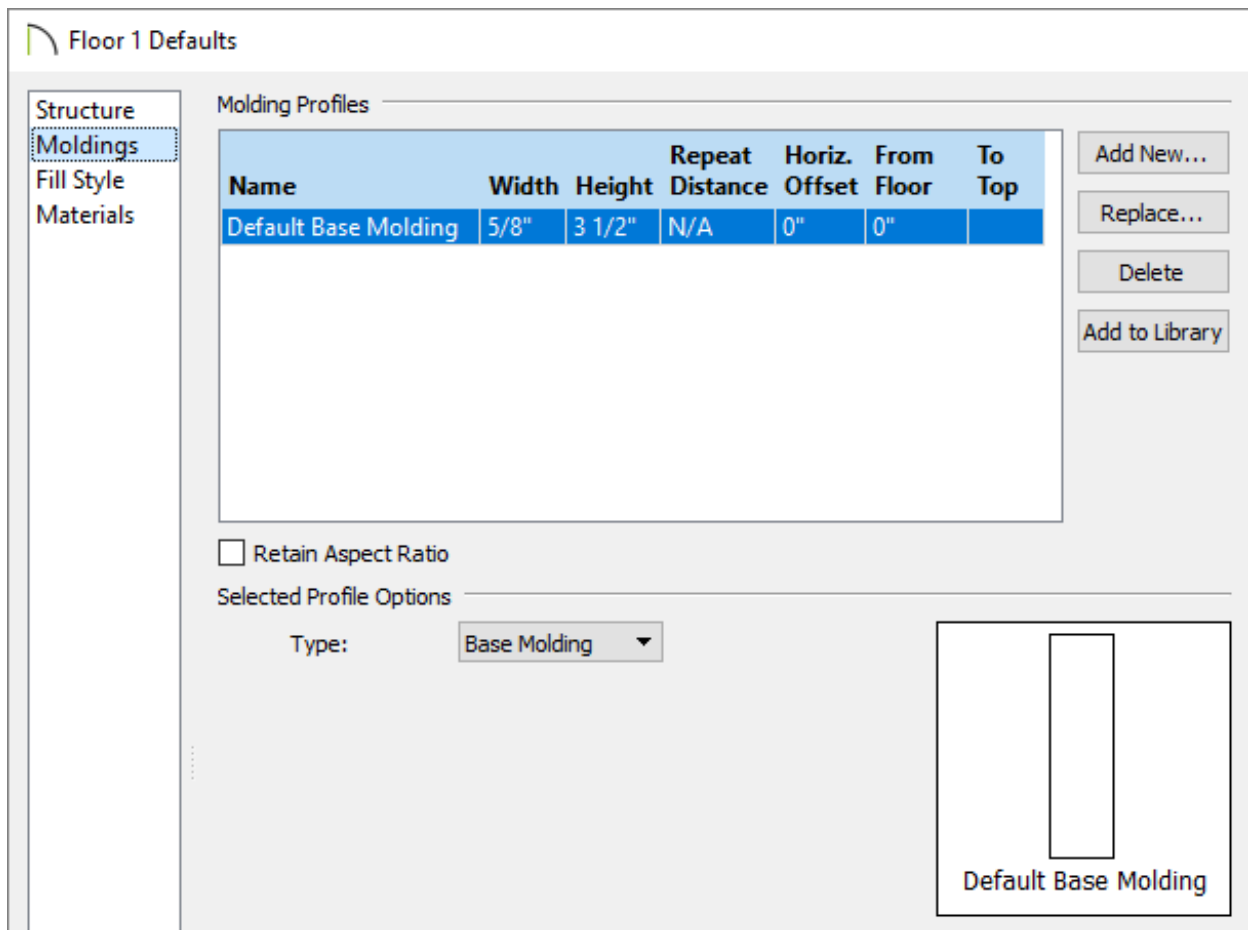
Relative Heights

Rough Ceiling: 109 1/8"
Finished Ceiling: 107 5/8"
SWT To Ceiling: 109 1/8"
Ceiling Below: 0"
Stem Wall: 37 1/2"
SWT = Stem Wall Top

At the bottom of the Structure panel, there is a setting for Monolithic Slab Foundation. If a foundation plan is desired, do NOT put a check in this setting. Instead, choose Monolithic Slab in the Build Foundation dialog or the Foundation Defaults prior to building the foundation. If Monolithic Slab Foundation is checked, the current Floor Structure will be replaced by a single 4" (100mm) layer of concrete with footings that can be seen in camera views only.

4. On the MOLDINGS panel:


- The default template will have one molding already set up for Base Molding.
 - If you want to remove the molding, choose **Delete**.
 - If you want to add additional moldings, Click on **Add New**.
 - If you want to replace the existing molding with a new one, choose **Replace**.
- If you click on **Add New** or **Replace**, the **Select Library Objects** dialog will appear where you can then browse to find a molding profile that meets your needs.
- Specify the **Height** and **Width**, the **Type**, along with other related properties if desired.



5. When you are satisfied with your selections, click **OK**.

Framing Defaults

The Framing Defaults dialog allows you to specify several properties relating to floor, ceiling, wall, and roof framing components, including such things as spacing, joist widths, framing materials, and plate values. Properties for beams, posts, roof trusses, along with door and window openings can also be setup here.

1. Select **Edit> Default Settings**  from the menu to open the **Default Settings** dialog.
2. Select **Framing** and click the **Edit** button.
3. On the **FOUNDATION** panel of the **Framing Defaults** dialog, specify the **Spacing** and **Joist Width** listed for the Subfloor for Floor 1


4. On the **1st** panel specify the **Spacing** and **Joist Width** for the Ceiling Above Floor 1 as well as the Subfloor for Floor 2

Notice that the Floor Structure and Ceiling Structure matches what is specified in the Floor/Ceiling Platform Defaults section specified earlier.

5. Specify your desired settings for the additional framing defaults located in this dialog, and then click **OK**.

Wall Type Defaults

The settings in the various wall defaults dialogs determine what wall types are drawn when using the different wall tools. It's import to become familiar with these settings and how they related to your style of building.

1. Select **Edit> Default Settings**  from the menu to open the **Default Settings** dialog.
2. Expand the list for **Walls**, select **Exterior Wall**, and then click the **Edit** button.
3. In the **Wall Defaults** dialog that displays, click on the **WALL TYPES** panel and specify the desired wall type to be used when using this particular wall tool.
 - Click the **Define** button if you would like to create or modify a custom wall type in the **Wall Type Definitions** dialog.


For more information on customizing or creating a new wall type, please see the [Related Articles](#) section below.

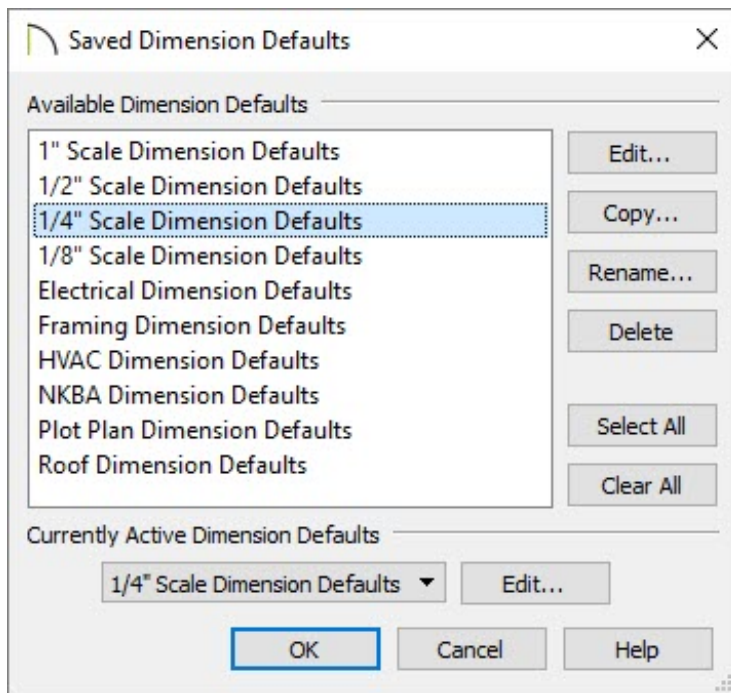
- In addition to specifying structural aspects of a wall, such as its framing and sheathing, you can specify siding material such as lap siding, shingles or stucco and interior materials including paneling, finished tongue and groove, and sheetrock.

4. Repeat steps 2 and 3 to define the defaults for **Interior Wall**, **Foundation Wall**, **Pony Wall**, as well as the other wall-related tools.
 - o The **Half-Wall**, **Railing**, **Deck Railing** and **Fencing Defaults** dialogs are similar to the Railing, Newels/Balusters, Layer and Materials tabs of their corresponding specification dialogs. A variety of attributes can be specified here, including railing construction, newel and baluster size, style and spacing, and materials.

Dimension Defaults

There are several saved dimension defaults. Having multiple defaults allows you to switch between them to have the dimensions change their behavior when you're dimensioning for different views. For example, you can have dimensions location the framing layer of the walls for your framing plans and the interior surface of the walls for your interior design plans. Another example would be specifying a different sized text style for your plot plan vs. a smaller sized text style for interior elevations.

1. Select **Edit> Default Settings**  from the menu to open the **Default Settings** dialog.
2. Expand the list for **Dimension**, select **Dimensions**, and click the **Edit** button.
3. In the **Saved Dimension Defaults** dialog that opens, the active dimension default is highlighted in the list as well as being specified at the bottom of the dialog.



4. Select the default that needs to change and then click **Edit** to open the saved default. Review these setting to verify that they meet the needs of your projects. The most commonly changed settings are as follows:
 - On the **PRIMARY FORMAT** panel, specify the desired Units.
 - On the **LOCATE OBJECTS** panel, specify which objects you want the dimensions to locate.
 - On the **LAYER** panel, specify which layer these dimensions should be on.
 - On the **TEXT STYLE** panel, specify which Text Style Default these dimensions should use.
5. Complete these steps for all Dimension Defaults in the template.

Keep in mind, the Auto Dimension defaults (Auto Exterior, Auto Interior, Auto Elevation, etc.) apply only when the corresponding auto dimension tool is used.

If you want to have the Manual Dimensions locate interior wall surfaces, set the Dimension Default to locate "Surfaces" and "Both Wall Sides" on the Locate Objects panel.

It's recommended that Temporary Dimensions reflect the same settings as Manual Dimensions so be sure to have "Locate Wall Surface" and "Locate Both Wall Sides" selected as well as "Locate Wall Surface" and "Automatic" under the With Wall Opening Selected section.

Saving the Template

Once the default settings for a file are setup to your liking, it's a good idea to save it as a template to be used for future plans.

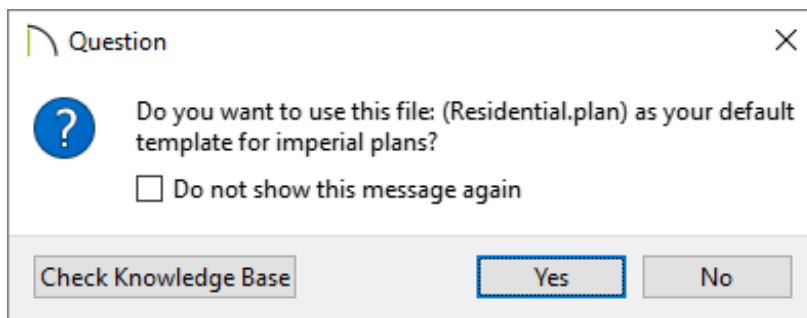
1. Select **File> Templates> Save As Template** .


2. Give the new template a short, descriptive name and then click **Save**.

The Chief Architect Templates folder is the default file location when choosing the Save As Template option. If you'd like to change the file location in which you save this to, you can do so prior to clicking on the Save button.

3. A popup message will display asking: "Do you want to use this file: (template name.plan) as your default template for imperial (or metric) plans?"

Choose **Yes** if you want to use this template as the default or **No** if you want to use a different template as your default.





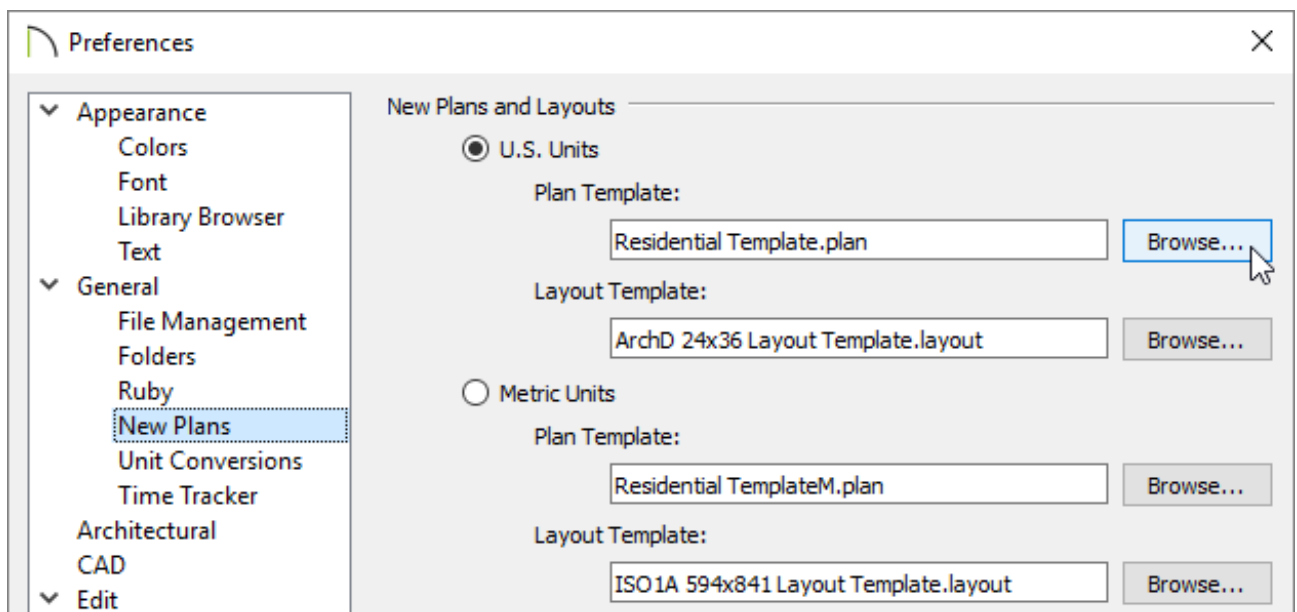
4. To choose a different template to create a new plan, select **File> Templates> New Plan from Template** .

5. Select the template from the list and click **OK**.

Setting the Default Template

To set the default template whenever you open a New Plan file, specify it as your template in the Preferences dialog.

1. Select **Edit> Preferences**  if you're on a Windows PC or **Chief Architect> Preferences**  if you're on a Mac.
2. On the **NEW PLANS** panel of the **Preferences** dialog, click the **Browse** button to the right of the Plan Template text field for your unit of measurement.



3. In the **Select a Plan Template File** dialog, browse to the location of your new template file and click **Open** to specify this file as your plan template.

4. Click **OK** to close the dialog and apply your change.

Related Articles

- [📄 Configuring Stair Defaults \(/support/article/KB-00459/configuring-stair-defaults.html\)](/support/article/KB-00459/configuring-stair-defaults.html)
- [📄 Creating and Using Layout Templates \(/support/article/KB-00737/creating-and-using-](/support/article/KB-00737/creating-and-using-)

[layout-templates.html](#))

📄 [Defining a New Wall Type \(/support/article/KB-02944/defining-a-new-wall-type.html\)](/support/article/KB-02944/defining-a-new-wall-type.html)

📄 [Setting up a Custom Annotation Set and Importing it into Another File](#)

[\(/support/article/KB-01167/setting-up-a-custom-annotation-set-and-importing-it-into-another-file.html\)](/support/article/KB-01167/setting-up-a-custom-annotation-set-and-importing-it-into-another-file.html)

📄 [Using Layer Sets \(/support/article/KB-00765/using-layer-sets.html\)](/support/article/KB-00765/using-layer-sets.html)

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