

Creating and Using Plan Templates

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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 start a new project or create 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. While using Traditional File Management or working in X16 and prior, 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 you're using Project Management in X17, templates are part of the "Plan and Layout Templates" section within the Project Browser, and no additional file management needs to take place.

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 and file-specific settings 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 Project** , give your new project a name, then choose the Residential Template.plan as your **Plan Template**.

Using Traditional File Management in X17, or while working in X16 and prior instead select **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](#)

Note: Although not every setting or topic relating to a plan template is discussed in this article, it's important to familiarize yourself with the various plan template settings that can be changed or specified. These include: all default settings, default sets, layers, layer sets, and layer settings, saved plan views, wall type definitions, custom text macros, and detail drawings, notes, and schedules located in CAD detail views.

Please see the [Related Articles](#) section below for more information.

Saving & Creating

- [Saving the Template](#)
- [Setting the Default Template](#)
- [Creating a new plan or project](#)

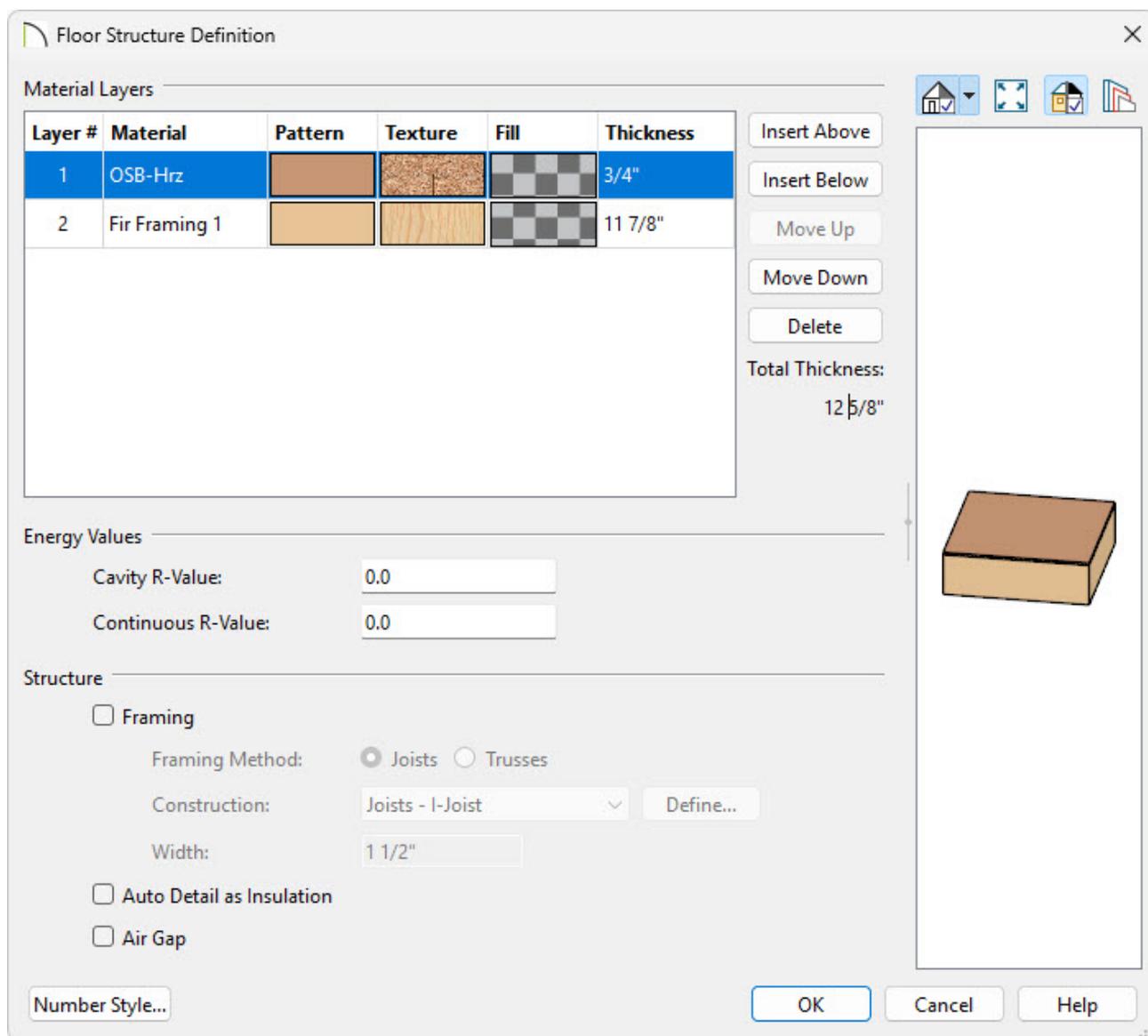
Floor and Ceiling Structure Defaults

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, Structure properties, 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.
- Specify whether the selected layer has special structural attributes.
 - Check **Framing** to produce framing in the selected layer when framing is generated for the selected structural assembly's type. When checked, additional framing settings are available, such as the **Framing Method**, **Construction**, and **Width**.
 - Check **Auto Detail as Insulation** to generate Insulation boxes in the selected layer when **Auto Detail**  is used in cross section views.
 - Check **Air Gap** to prevent the selected layer from displaying in 3D views or being calculated in the Materials List.
- 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 **1st Floor**, and then click **Edit**.
3. On the **STRUCTURE** panel of the **1st Floor 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.

1st Floor Defaults

Structure

Moldings

Fill Style

Materials

Object Information

Absolute Elevations

Floor Above:

Ceiling:

Floor:

Floor Below:

Relative Heights

Rough Ceiling:

Finished Ceiling:

SWT To Ceiling:

Ceiling Below:

Stem Wall:

SWT = Stem Wall Top

Ceiling

Roof Over This Room

Flat Ceiling Over This Room

Shelf Ceiling

Use Soffit Surface for Ceiling

Ceiling Structure: 5 1/2" Default

Ceiling Finish: 5/8" Default

Floor

Floor Under This Room

Floor Supplied by the Foundation Room Below

Monolithic Slab Foundation

Raised Floor For Bump Out

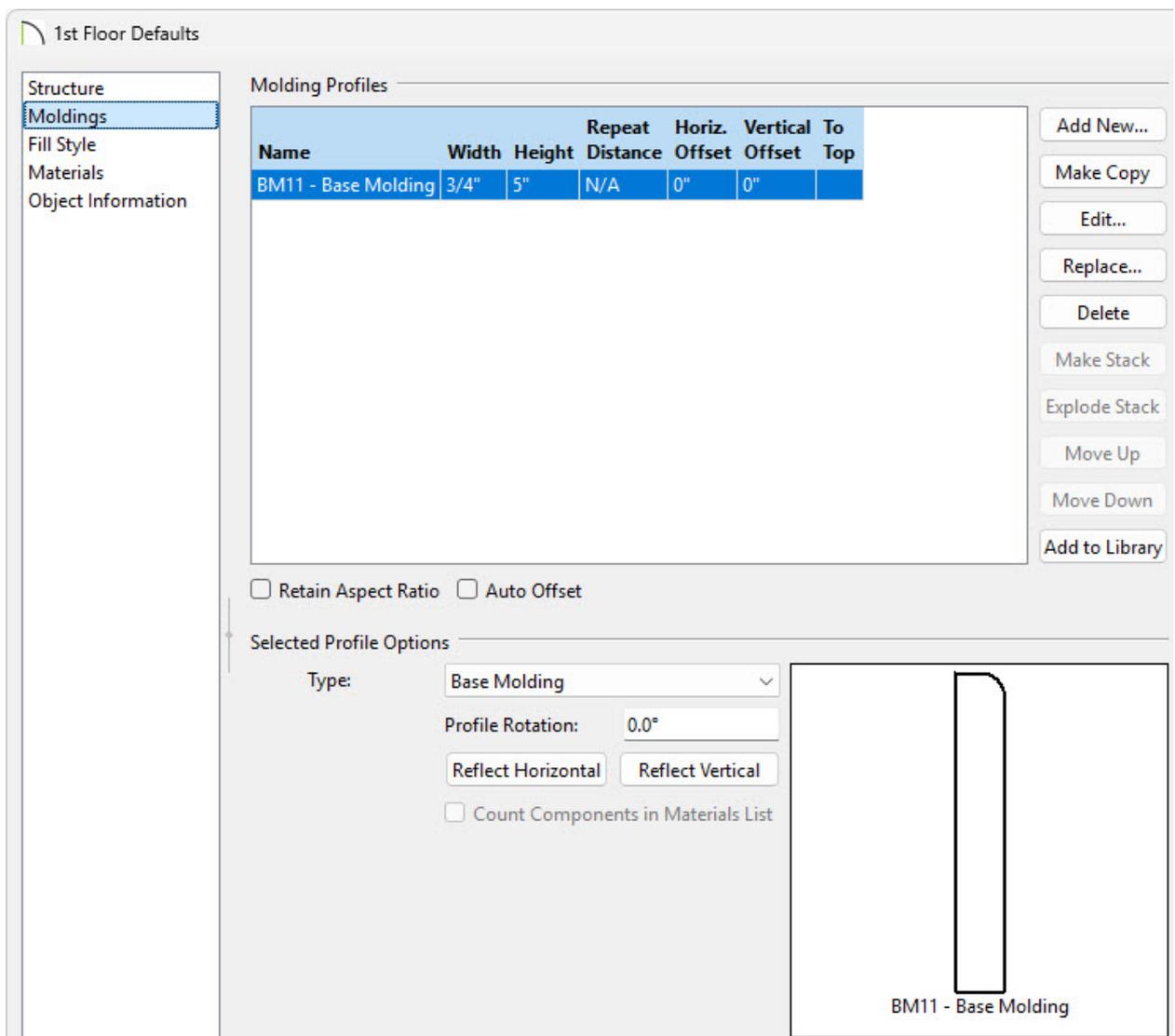
Floor Finish: 7/8" Default

Floor Structure: 12 5/8" Default

At the bottom of the Structure panel, there is a setting for Monolithic Slab Foundation. If a foundation plan is desired, do NOT check 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 setup 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 **Width** and **Height**, 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. Expand the **Framing** category, select **Automatic Framing**, and click **Edit**.

In X16 and prior, instead expand the **Framing** category, select **General Framing**, and click **Edit**.

3. On the FOUNDATION panel of the **Framing Defaults** dialog, specify the **Spacing** and **Width** listed for the Subfloor for Floor 1
4. On the 1ST panel specify the **Spacing** and **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.

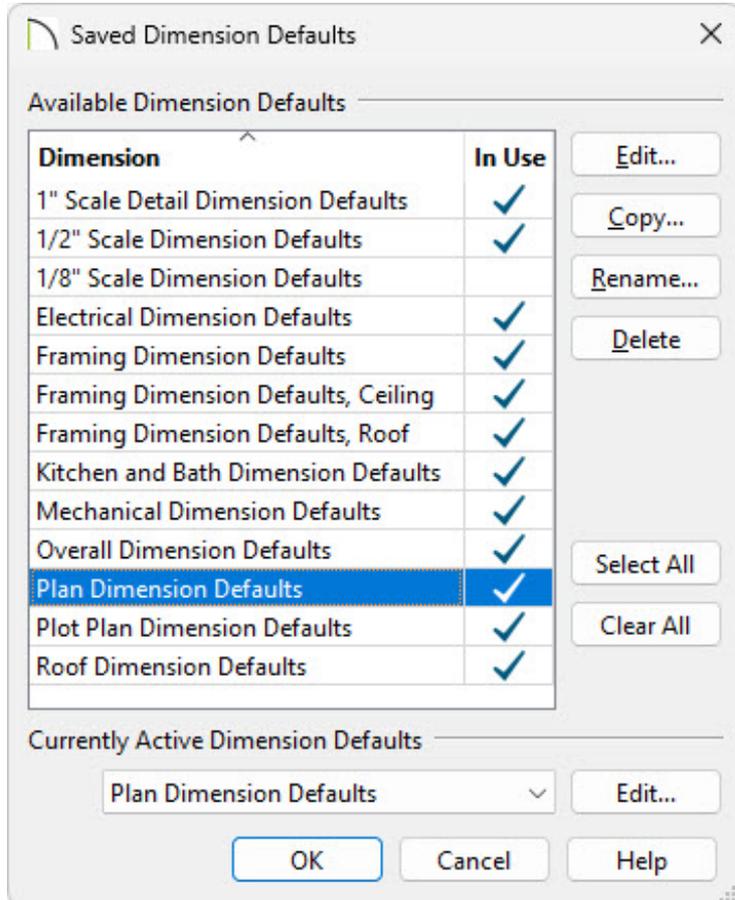
- In addition to specifying structural aspects of a wall, such as its framing and sheathing, you can specify siding material such as lap siding, shingles or stucco and interior materials including paneling, finished tongue and groove, and sheetrock.
4. Repeat steps 2 and 3 to define the defaults for **Interior Wall**, **Foundation Wall**, **Pony Wall**, as well as any other other Wall tools.

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 versus 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 settings to verify that they meet the needs of your projects.
 - Access each of the **LOCATE...** panels to specify which objects you want dimensions to locate when using the various Dimension tools.
 - Specify the desired Format on the **PRIMARY FORMAT** panel.
 - Specify the desired Text Style on the **TEXT STYLE** panel.
5. Repeat Step 4 for all Dimension Defaults in the template.

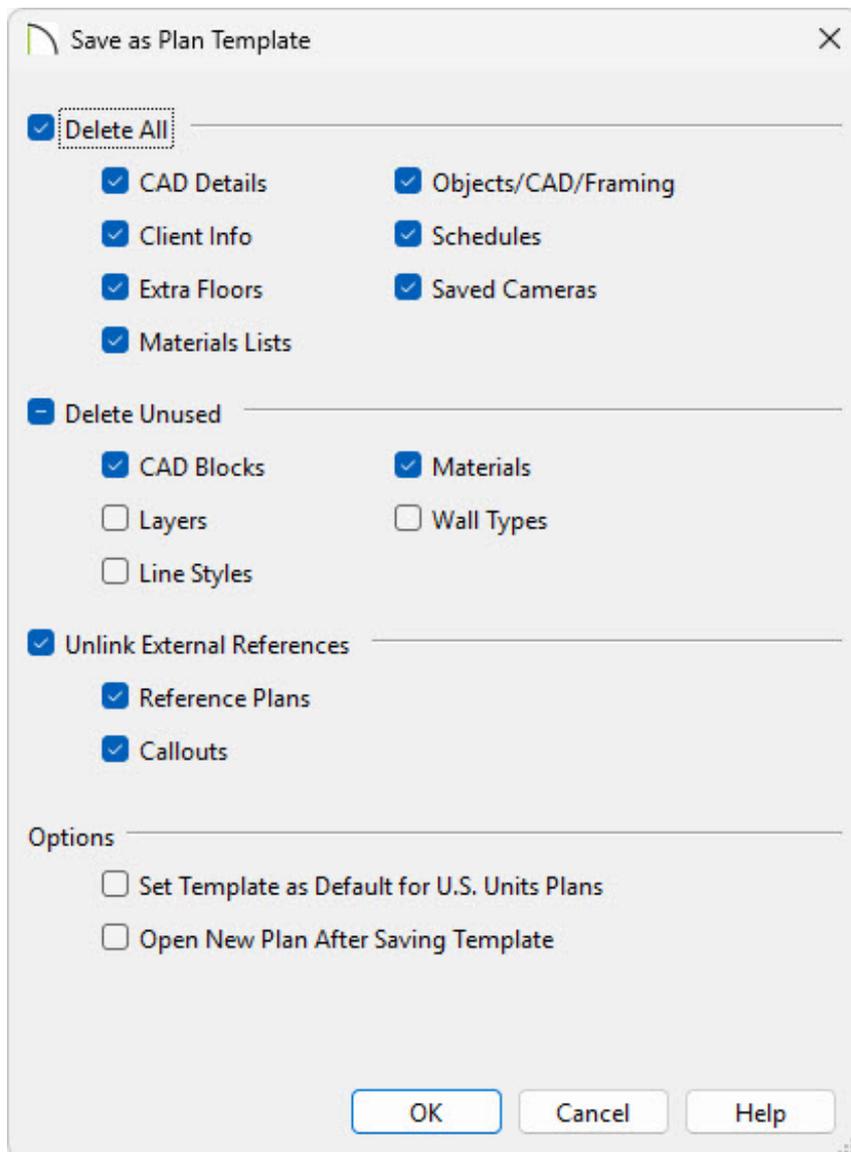
Saving the Template

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> Save As Template** , or within the **Project Browser** , right-click on your plan file, and choose **Save as Template** from the contextual menu when you're using Project Management.

In X16 and prior, select **File> Templates> Save As Template**  instead.

2. In the **Save as Plan Template** dialog that displays:



- o Check the box beside each category of object or data that you want to delete from the current file.

- Check **Set Template as Default for U.S. Units/Metric Plans** to use the new template as your default template whenever you create a **New Plan** .
- Check **Open New Plan After Saving Template** if you'd like to create a new layout right away.
- Click **OK**.

3. Give the new template a short, descriptive name, then click **OK**.

4. When using Project Management in X17, the template will be located in your Plan and Layout Templates folder within the **Project Browser** .

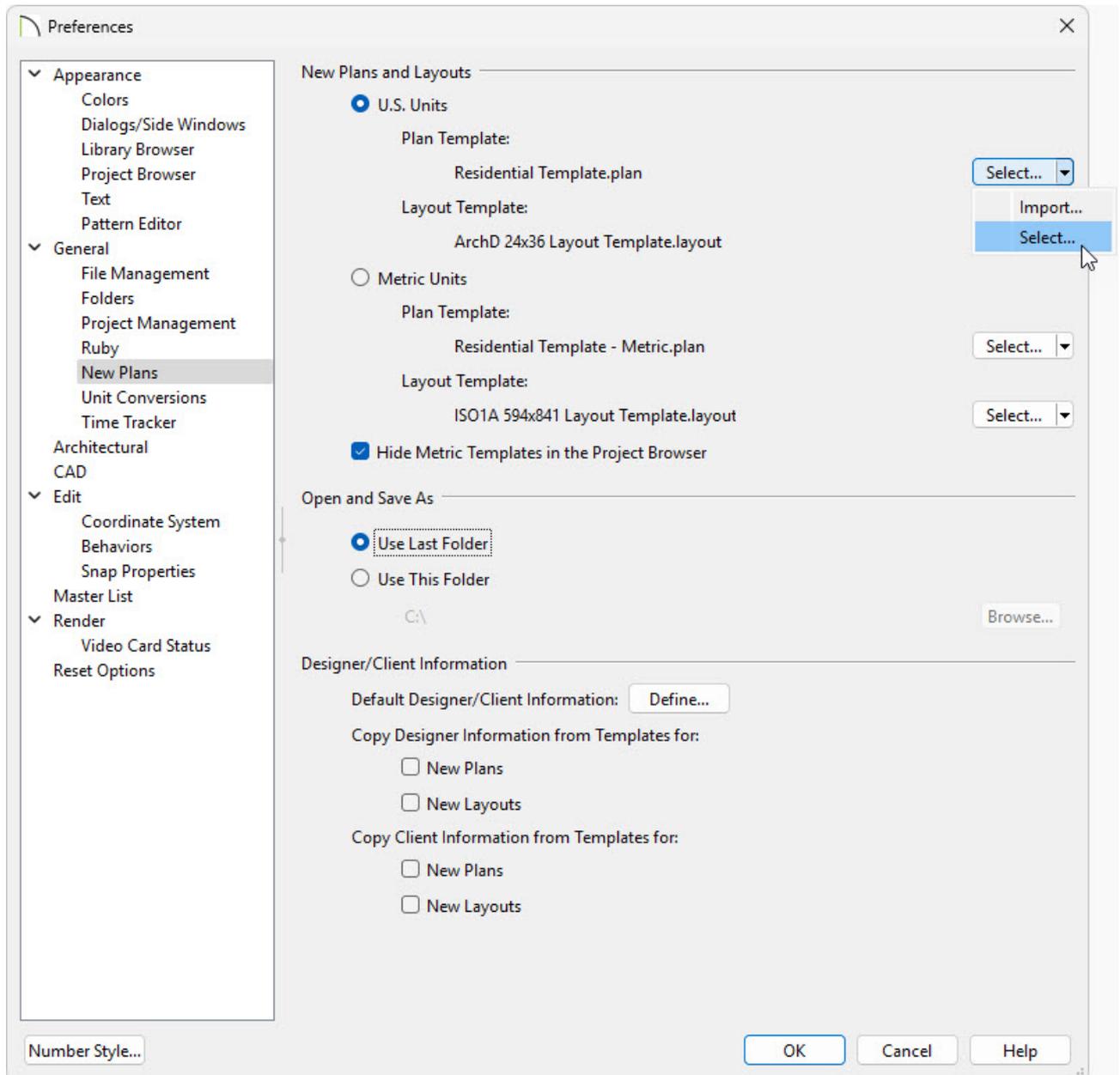
In X16 and prior, or when using Traditional File Management in X17, click **Save** and the program will automatically save the template to the program's Templates directory on your computer.

If you want to share your newly created template with a colleague or another Chief Architect user, please see the resources located in the [Related Articles](#) section below.

Setting the Default Template

You can change the default plan template that is used whenever you open a new plan file by accessing the program's Preferences dialog. If the "Set Template as Default for U.S. Units/Metric Plans" box was checked in the section above, it's not necessary to follow the instructions below as you have already set your customized plan to be the default plan template.

1. Select **Edit> Preferences**  from the menu 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:



When using Project Management in X17, follow the steps below:

- Click the **Select** button to the right of the Plan Template option to open the **Resource Management** dialog.

If you don't see the **Select** button, click on the drop-down arrow next to **Import** and then choose **Select**.

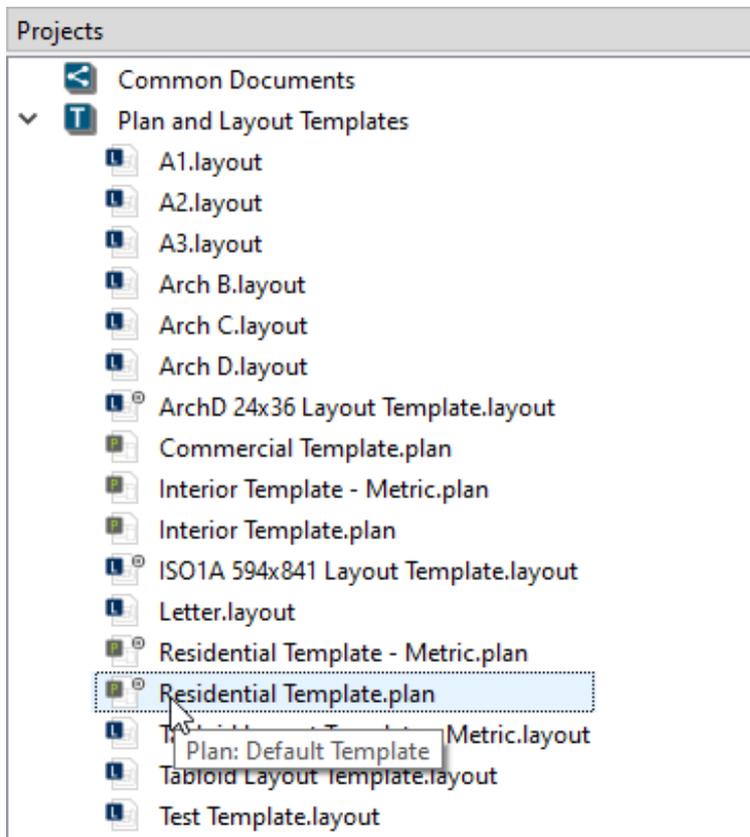
- In the **Resource Management** dialog find the template you'd like to use, select it, and click **OK** to set it as your default template. If the plan template you'd like to use isn't listed it's likely that it hasn't been imported into Project Management.
- To import into Project Management, click on **Import**

If you don't see the **Import** button, click on the drop-down arrow next to **Select** and then choose **Import**.

Additionally, you can use the Project Browser to import templates by right-clicking on the "Plan and Layout Templates" section in the Project Browser and choosing "Import Template(s)".

You can also set a template as a default by right-clicking on it within the Project Browser and choosing "Use as Default Plan/Layout Template."

- In the **Select a Plan Template File** dialog, locate the plan file you'd like to import, select it, and choose **Open**.
- Once it has been imported, repeat the initial steps above.
- Click **OK** to close the dialog. The Project Browser will display an icon beside the default template(s), as well as display a tooltip when hovering over the file(s).



In X16 and prior, or when using Traditional File Management in X17, follow the steps below:

- Click the **Browse** button to the right of the Plan Template text field for the unit of measurement you're using.

If you don't see the **Browse** button, click on the drop-down arrow next to **Edit Path** and then choose **Browse**.

- In the dialog that opens next, browse to the location of your new plan template file, select it, and then click **Open** to specify this file as your default plan template.
- Click **OK** to close the dialog.

Now, when a new plan or project is created, the file(s) specified in Preferences will be the default option.

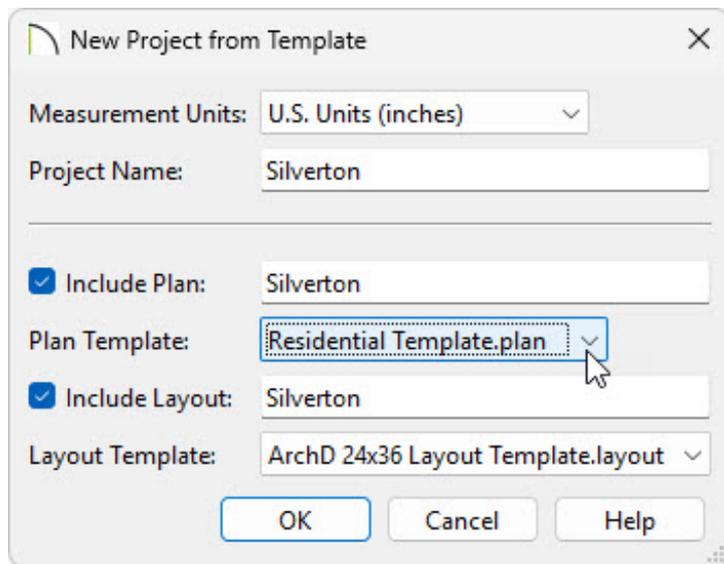
Creating a new plan or project

1. Select **File> New Project**  to create a new project.

In X16 and prior, or when using Traditional File Management in X17, select **New> Plan**  instead. The file that opens will be based on the template specified in Preferences.

2. Choose your **Measurement Units** and specify a **Project Name**.
3. Check the box for **Include Plan** and choose a **Plan Template** using the drop-down.

The **Plan Template** selection will initially match the template that is specified in Preferences.



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Related Articles

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