

Creating and Using Layout Templates

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Last Modified: **July 26, 2023**

The information in this article applies to:



QUESTION

I would like to create and use a layout template in Chief Architect. How do I do this?

ANSWER

A template file has all of your preferred default settings, layer display options, and other file-specific information saved and waiting for you.

A layout template can also feature a border with your company information, logo, text macros and other details. When you identify a file as a template, Chief Architect refers to that file for this information any time you open a new layout file.

Creating a layout template is easy and can save you a lot of time when creating a new layout file. In this article, we will discuss how to:

- Setup the orientation and size
- Setup the layout box defaults (*Applies to X14 and newer program versions*)
- Set default designer and client info

- Create the layout title block and border
- Save and use the file as a template
- Change the default layout template

To setup the orientation and size

1. Start by selecting **File> New Layout**  from the menu to create a new, blank layout file.
2. Navigate to **File> Print> Drawing Sheet Setup** .

Drawing Sheet Setup

Drawing Sheet

Orientation: ☐ Portrait ☒ Landscape

Size: ARCH D (24" x 36") Customize...

☒ Show Drawing Sheet in View

Drawing Scale

1 in = 1 in

Printer for View

☒ Remember Print Settings after Printing

Printer: Last Printer Used: Chief Architect Save As PDF Choose...

Drawing Margins

Populate From Printer

Top: 0"

Bottom: 0"

Left: 0"

Right: 0"

Advanced Line Weight Options

☐ Use 1 for all line weights (Home Designer compatibility)

A line weight of 1 = 1 / 100.0 mm

Preview of Line Weight at Drawing Scale of 1 in = 1 in

Line Weight	Approximate Printed Size
26	_____
53	_____
132	_____
265	_____

Number Style... OK Cancel Help

- Set the Drawing Sheet **Orientation** and **Size** to your liking.

In most cases, the Printer Paper and Drawing Sheet sizes should be the same.

- Make sure the **Drawing Scale** is set at a 1 to 1 scale.

Example: 1 in = 1 in


It is important not to change this, as the drawing scale is set when you send individual views to the layout.

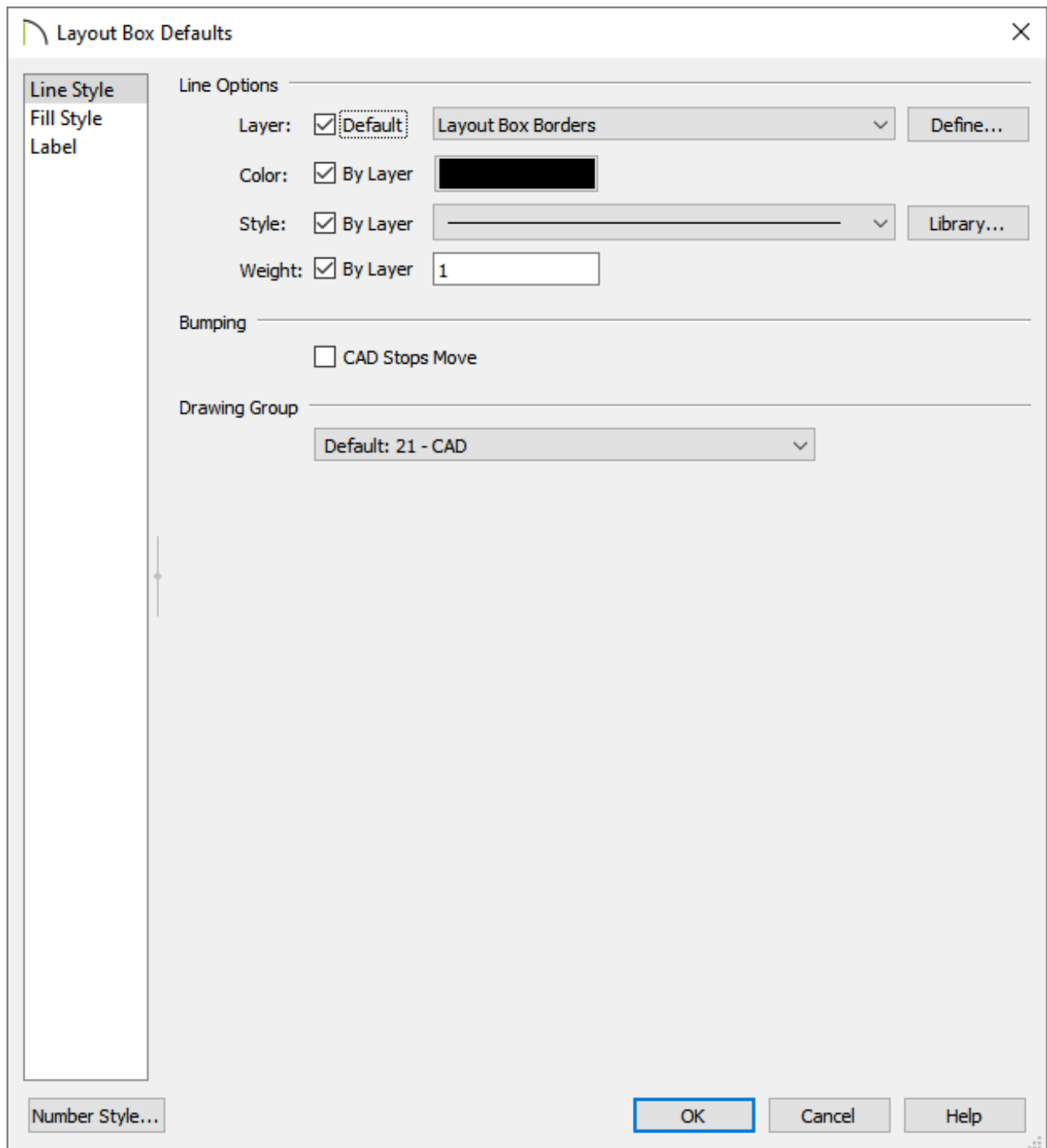
For more information about drawing scale as well as line weight scaling, click the **Help** button at the bottom of this dialog.

- Make any other desired changes, then click **OK** to apply your settings and close the dialog.

To setup layout box defaults*

**Applies to X14 and newer program versions*

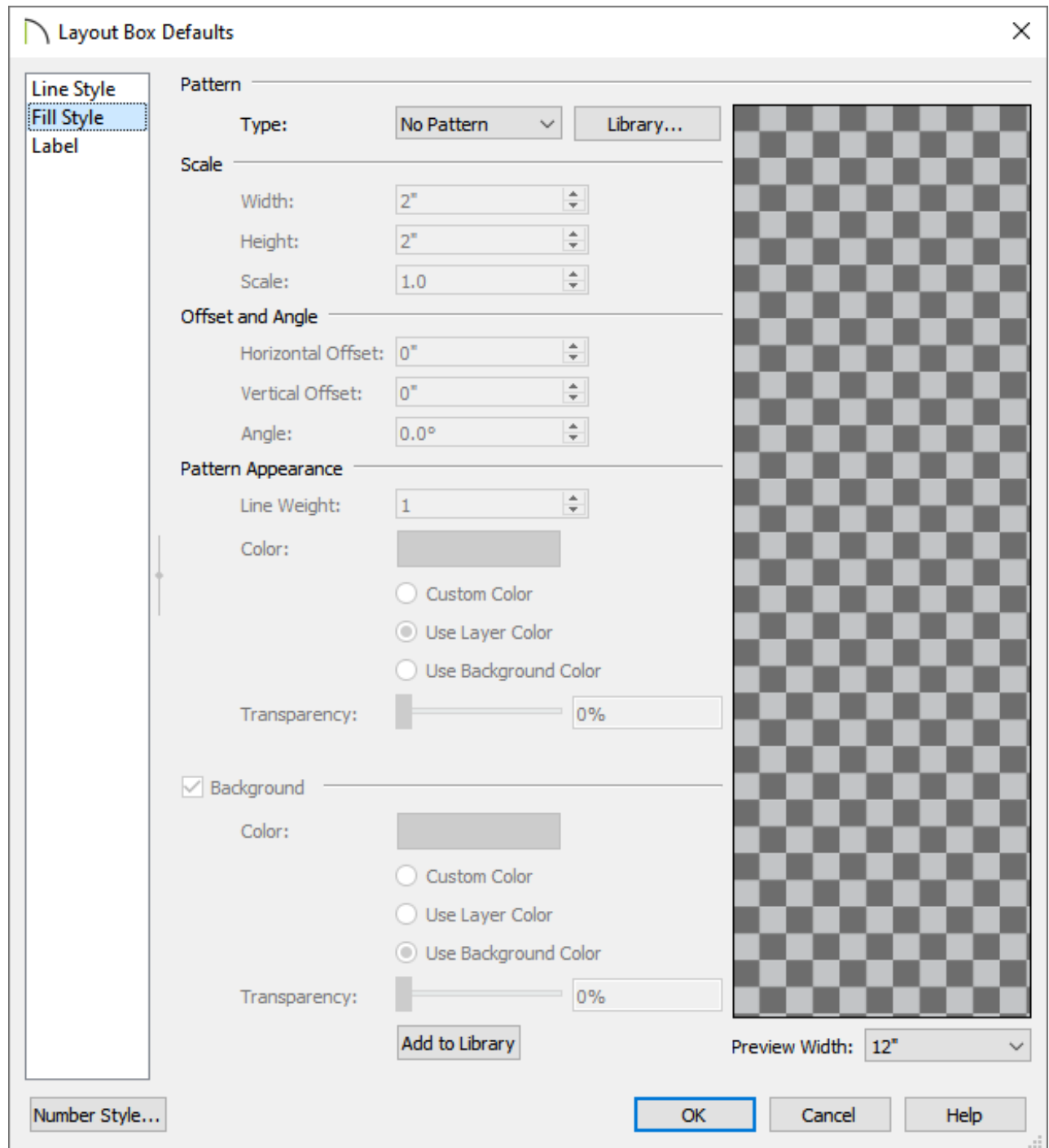
1. Within a layout file, navigate to **Edit> Default Settings** , select **Layout Box**, then click **Edit** to set up default behaviors for views sent to layout, as well as control their properties.
2. On the **LINE STYLE** panel:



- Set the **Layer** the layout boxes will be created on.
- Choose the line **Color**, **Style**, and **Weight** if the layout box borders are set to display.
- If you want CAD information to stop the movement of the layout box, check the box for **CAD Stops Move**.
- Set the **Drawing Group** you want these layout boxes to display with.

3. On the **FILL STYLE** panel, choose a **Pattern**, **Scale**, **Offset and Angle**, and **Pattern**

Appearance if you want the layout boxes to come in with a fill for the entire view.



4. On the LABEL panel:

Layout Box Defaults

Line Style
Fill Style
Label

☐ Suppress Label

Label Options

☒ Automatic Label
☐ Specify Label

☐ Use Callout Edit...
☐ Use Marker Edit...

☒ Use Default Formatting
☐ Display Border

Alignment: Left

☒ Auto Adjust Text Direction

Plan View Position and Orientation

X Offset: 0"
Y Offset: 3/4"
Angle: 0.0° ☒ Relative Angle ☐ Absolute Angle

Camera View Display

☒ Automatic
☐ Show in this View
☐ Hide in this View

Label Layer

☒ Use System Layer (Layout Box Labels)
☐ Use Object Layer (Layout Box Borders)
☐ Use Custom Layer

Layout Box Labels Define...

Number Style... OK Cancel Help

- Choose if you want to **Suppress Label**, use the **Automatic Label**, **Specify Label**, use a **Callout**, or use a **Marker** for your layout box labels.

Using a **Callout** or a **Marker** will allow you to **Specify** details of that callout or marker respectively.

- Decide if you want to display a border around the label and the alignment of the label.



- Set the **Position and Orientation** of the label.
- Decide what layer the label should be on.

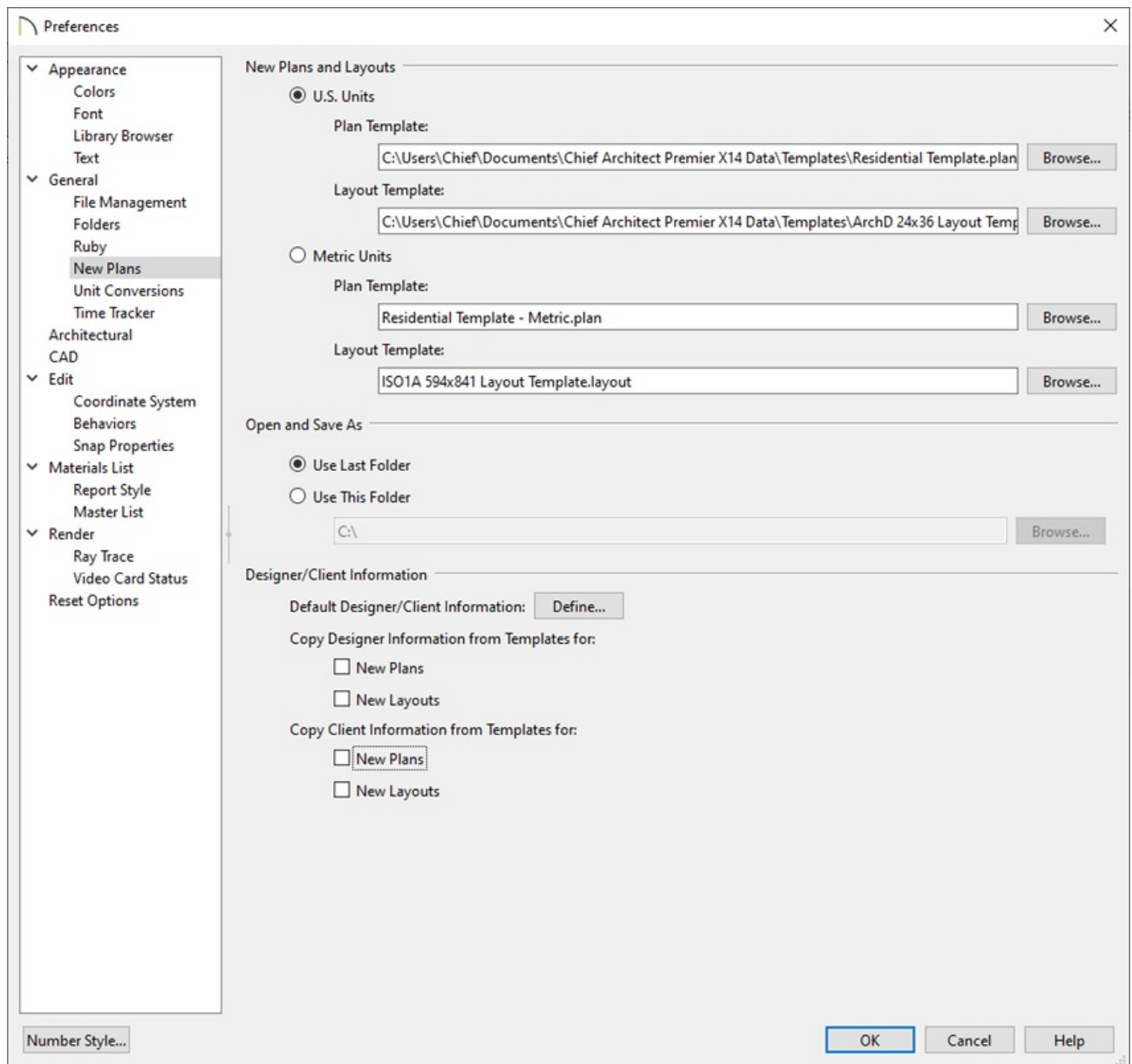
5. Click **OK** and **Done** to close the dialogs and confirm the changes.

To set default designer and client information

In X15 and newer you are able to set default designer/client information within the Preferences dialog.


In X14 and prior you can still set this information, but it must be done in each individual plan/layout or within your template file.

1. To set this information in X15 and newer, select **Edit> Preferences**  from the menu if you're on a Windows PC or **Chief Architect> Preferences**  if you're on a Mac. In **Preferences**, go to the **NEW PLANS** panel located under **GENERAL**.



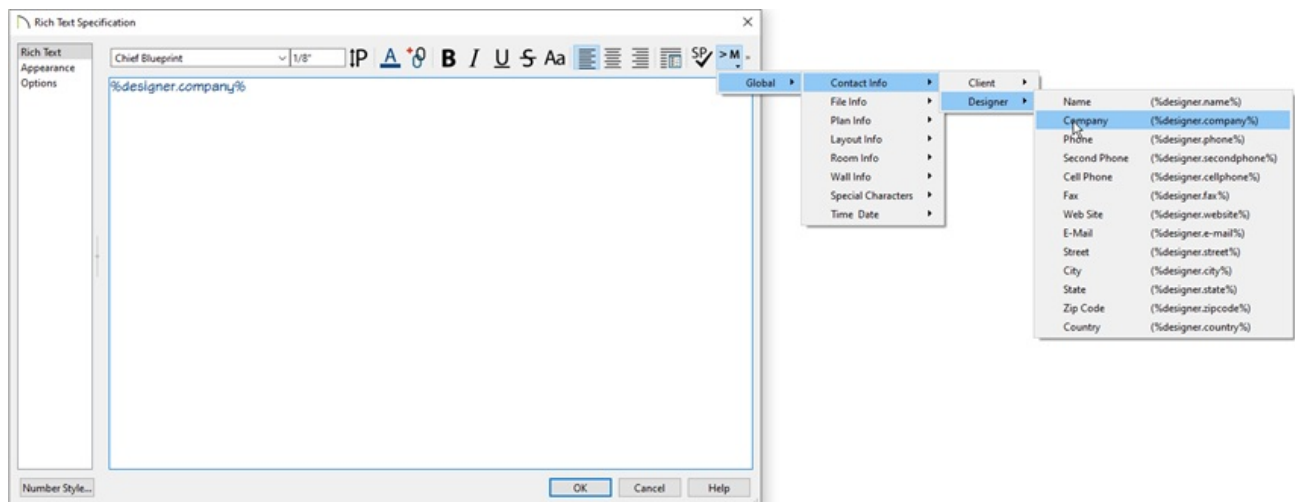
- To the right of Default Designer/Client Information click **Define**.
- Fill out the information for both the designer and the client. Once you are done filling out this information, click **OK**.
- Next, you can choose whether you'd like to copy this information to your newly created plans or layouts by checking the boxes for **New Plans** or **New Layouts** which can then be reported by using macros.



In X14 and prior you can still set this information, but it must be done in each individual plan/layout or within your template file.

- **Open**  your layout template or the file where you would like to specify this information.

- Go to **Tools> Designer/Client Information** and select either the **Designer Information**  or **Client Information**  to edit it.
- Fill out the information and click **OK**.

2. To report the Designer/Client information in your files you will need to use a text macro.








- In your layout template file go to **CAD> Text> Rich Text** .
- Click where you would like the text box to be to open the **Rich Text Specification**.
- In the **Rich Text Specification** select the **Insert Macro**  tool and go to **Global> Contact Info> Client/Designer** and select the macro that correlates to the information you would like to be reported. You can then use these macros when creating your custom title block.

To create a layout border and title block

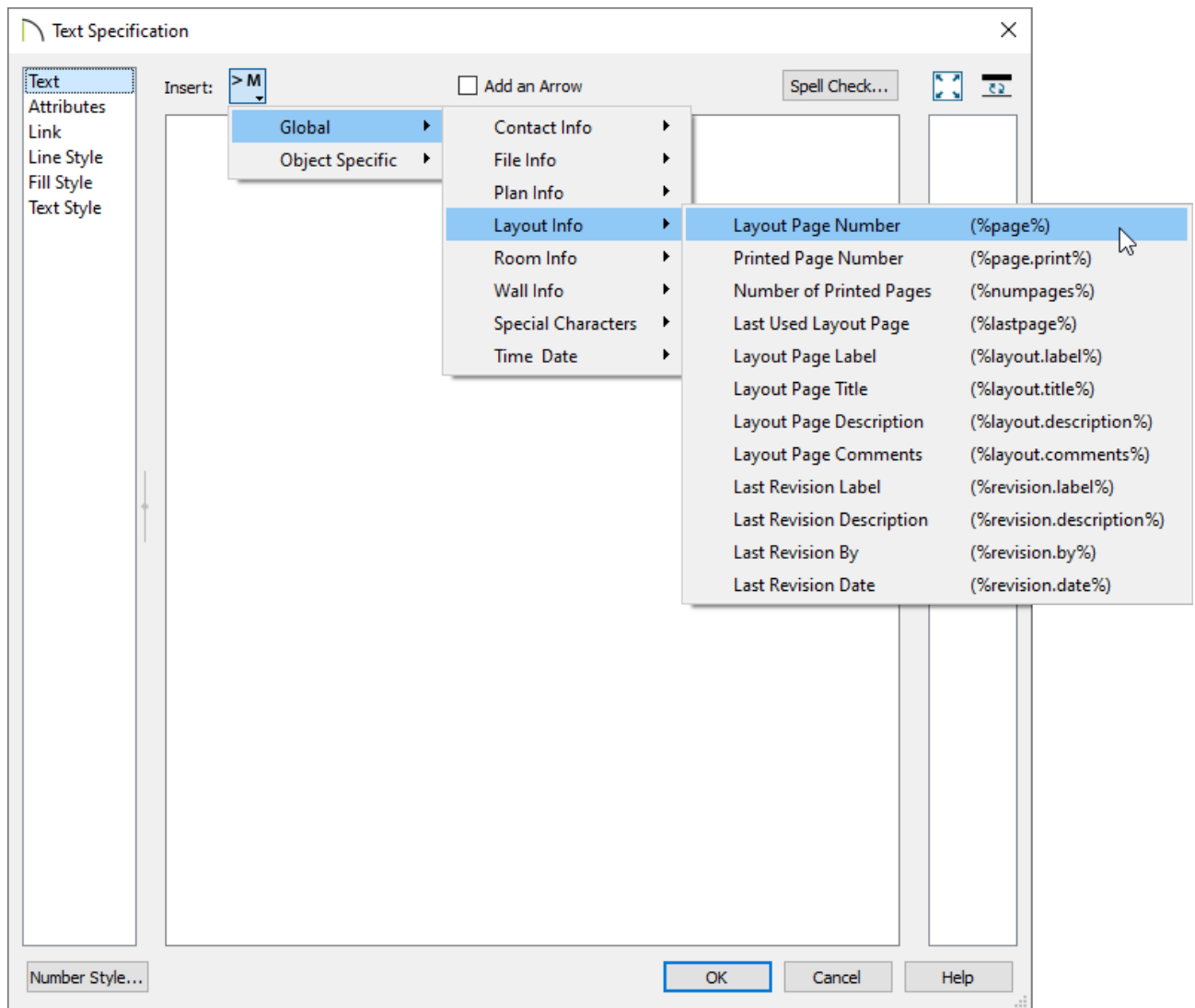
1. First, go to Page 0 of the layout file.



Page 0 is the Default Page Template. Items placed on this page show on every page of the layout that is assigned to follow this Page Template. It's possible to set up more than one page template. Please refer to the [Related Articles](#) section below for more information.

2. Using the CAD tools, create a border and title block that you want to display on each page of the layout.
3. Using **Text**  or **Rich Text** , add a company name, project information and any other notations that you may want to display on each page of the layout.
4. To insert a company logo, image, or PDF, select **File> Import> Import Picture**  or **File> Import> Import PDF** .
5. Macros are special commands that insert dynamic information into a text box. After placing a text object in the layout, select the **Insert Macro**  tool to insert a macro.

Text Macros are available in both plan and layout files, but are particularly useful in layouts, allowing you to automatically insert useful information such as the page number, date and time, and file name.

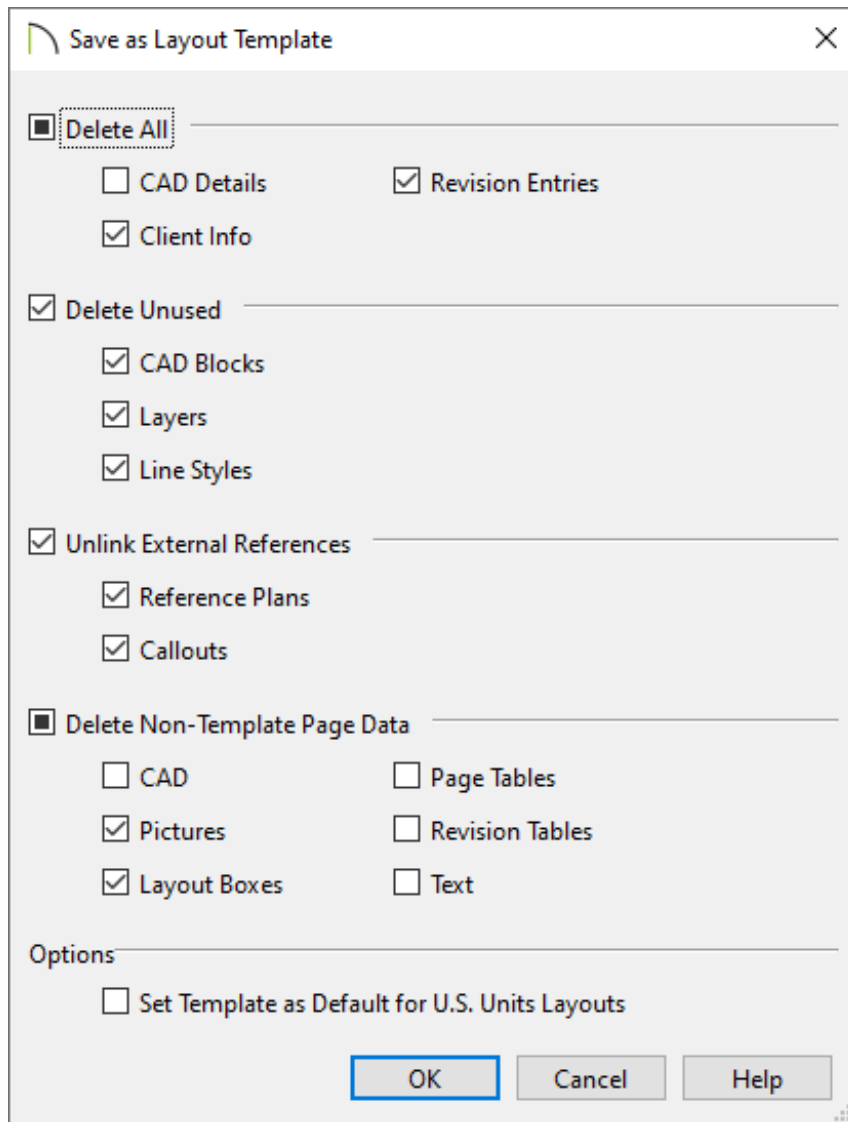


- You can use the **Layout Page Number (%page%)** macro to show the page number for each page of the layout.
- Use one of the Time or Date macros to insert the date or time in the layout to automatically let you know when you printed this layout.
- Add the file name for this layout sheet using one of the File Info text macros.
- Inserting this next to the binding edge will allow you to determine which file it is or even where this set of plans is located on your computer, should you need to reprint them in the future.

To save and use the file as a template


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

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



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

Starting in X13, the Delete Objects tool can be also be used to delete specific information from one or more pages of a layout file.



- Check **Set Template as Default for Imperial/Metric Layouts** to use the new template as your default template whenever you select **File> New Layout** .
- Click **OK**.

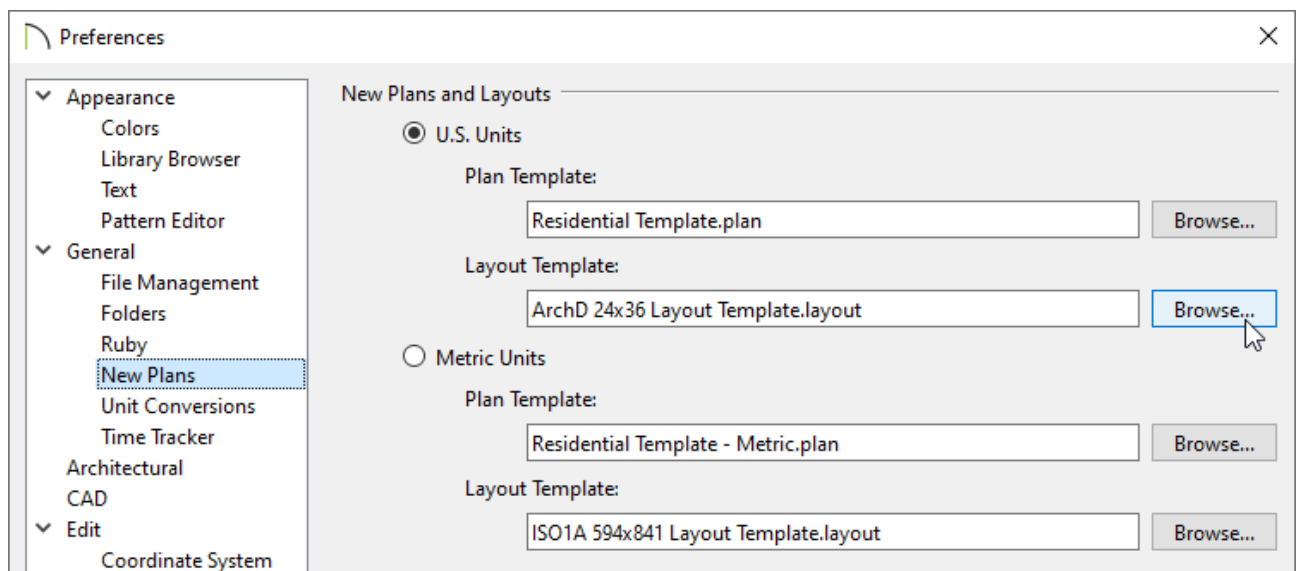
3. Give the new layout template a short, descriptive name.

4. Click **Save**, and the program will automatically save the template to the program's Templates directory on your computer.

To change the default layout template

You can change the default layout template that is used whenever you open a new layout file by accessing the program's Preferences dialog. If the **Set Template as Default for Imperial/Metric Layouts** was checked in the section above, it's not necessary to follow the instructions below as you've already set your customized layout to be the default layout 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:





- Click the **Browse** button to the right of the Layout Template text field for the unit of measurement you're using.
- In the dialog that opens next, browse to the location of your new layout template file, select it, and then click **Open** to specify this file as your default layout template.


- Click **OK** to close the dialog.

Related Articles

 [Creating and Using a Plan Template \(/support/article/KB-00463/creating-and-using-a-plan-template.html\)](/support/article/KB-00463/creating-and-using-a-plan-template.html)

 [Creating Custom Templates from Existing Projects \(/support/article/KB-03094/creating-custom-templates-from-existing-projects.html\)](/support/article/KB-03094/creating-custom-templates-from-existing-projects.html)

 [Resizing a Layout Title Block and Border \(/support/article/KB-02862/resizing-a-layout-title-block-and-border.html\)](/support/article/KB-02862/resizing-a-layout-title-block-and-border.html)

 [Setting Up Layout Template Pages \(/support/article/KB-03018/setting-up-layout-template-pages.html\)](/support/article/KB-03018/setting-up-layout-template-pages.html)



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