

Working With the Project Browser Using Traditional File Management

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QUESTION

I am using Traditional File Management, and I would like to quickly access a saved view, such as a plan view, cross section, CAD Detail, or layout page. How can I accomplish this task?


ANSWER

The Project Browser is a convenient way to access all of the views saved within a plan or layout when using Traditional File Management. This resource will discuss the following:

- [Working with the Project Browser side window](#)
- [Working with plans, layouts, and their subfolders](#)

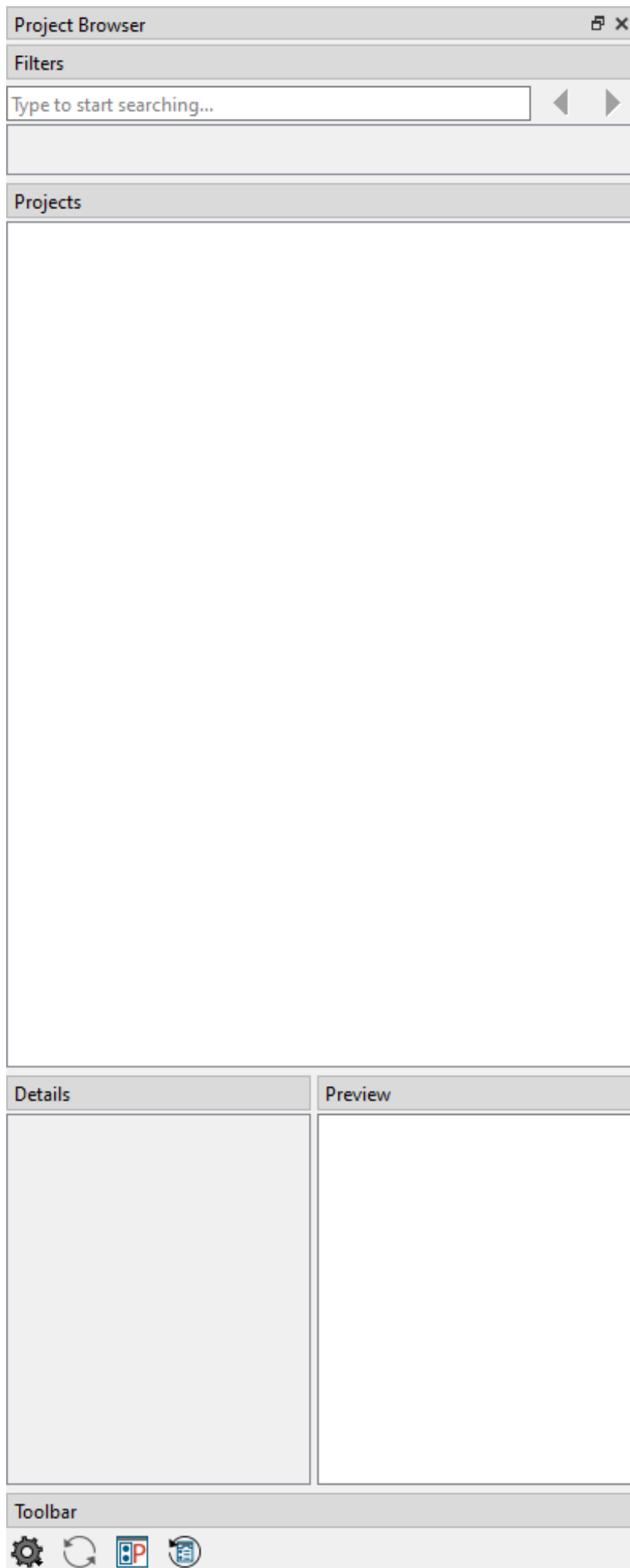
Note: If you're using Project Management in X17 or newer, please refer to the appropriate Project Browser resource in the [Related Articles](#) section below.

Working with the Project Browser side window

The Project Browser side window can be opened and closed at anytime by navigating to **View> Project Browser**  from the menu.

The Project Browser displays a variety of panels, or panes, when using Traditional File


Management.



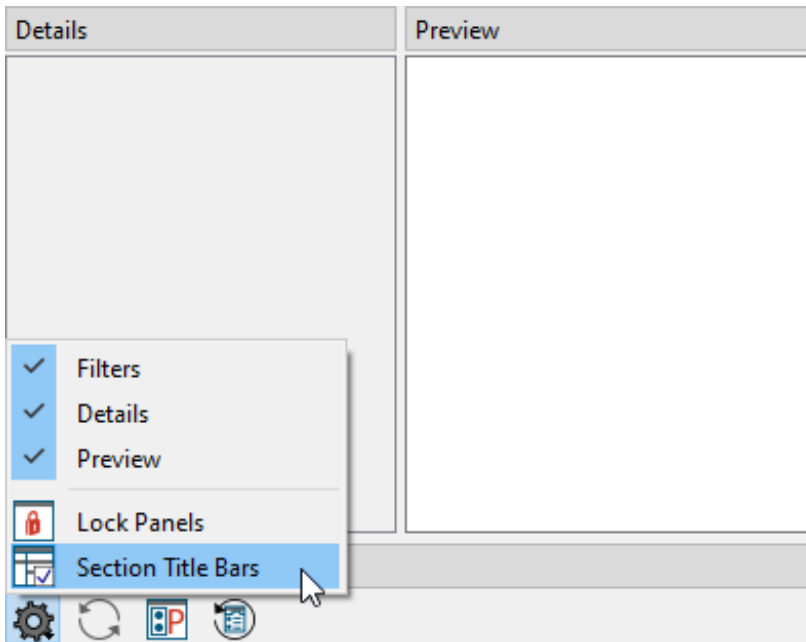
- **Filters*** - Used to search for, filter, and sort projects, files, and views.
- **Projects** - Where your plans and layouts display when they are open within the program. More details on this area of the Project Browser are located in the next section.
- **Details*** - Metadata (date created, date modified, file size, and folders) associated with a file or view is displayed here.
- **Preview** - Used to display previews of a selected view.
- **Toolbar** - Consists of settings and tools associated with the Project Browser.

**Applies to X17 and newer.*

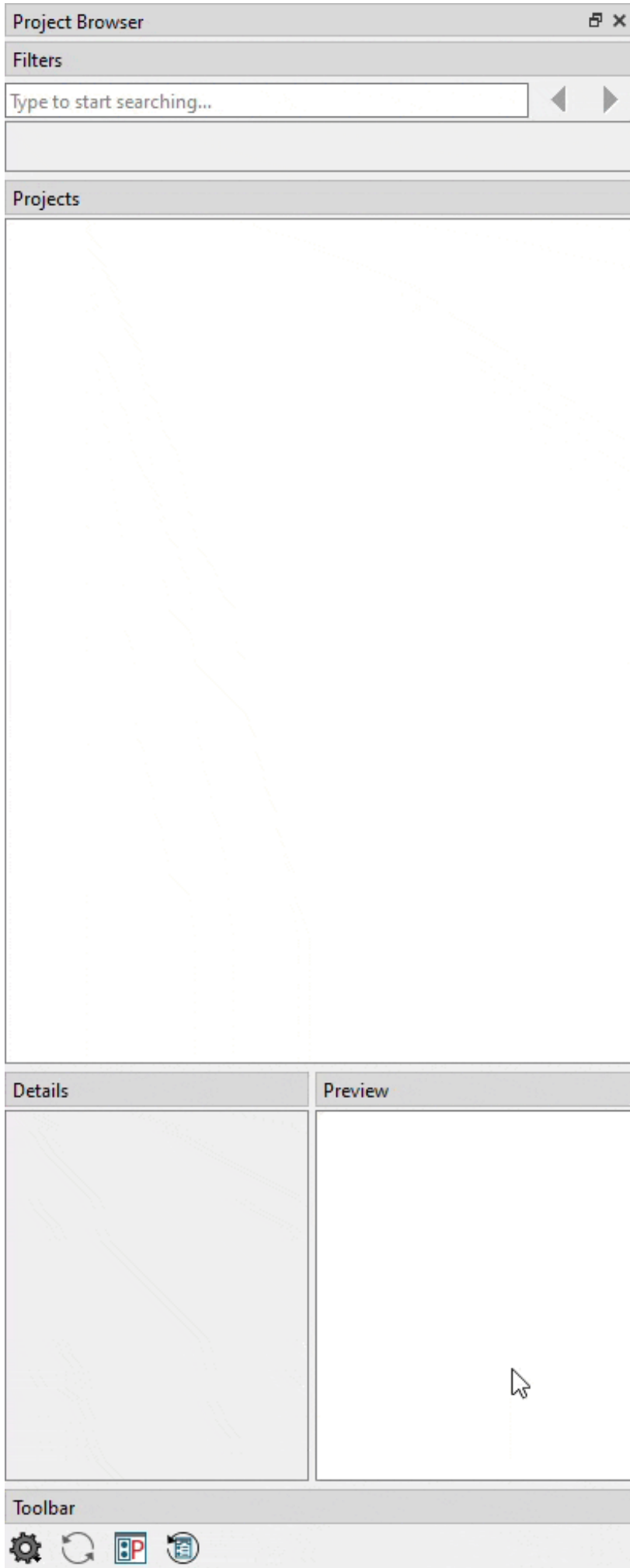
The Project Browser can be fully customized to your liking in X17 and newer; panels can be hidden, moved around, and adjusted to be a particular size, and the title bars associated with panels can be hidden.

To show/hide panels and title bars in X17 and newer, click on the **Project Browser Panel Options**  icon or right-click in an empty area within the Project Browser. In X16 and prior, the **Show/Hide Preview Panel**  icon can be selected to toggle the display of the preview panel.

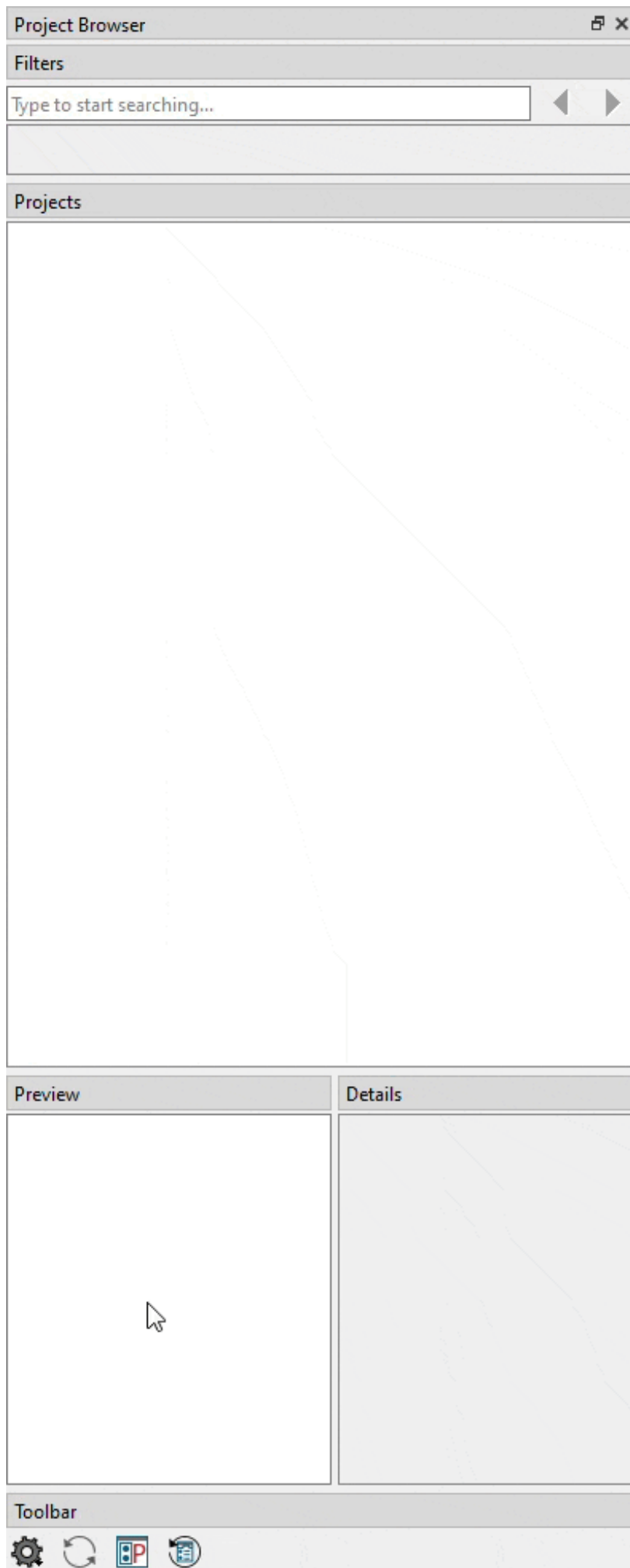
Note: On a Mac, hold down the Control key while clicking to initiate a right-click command. More information about right-click commands on Apple input devices can be found in the following Apple resource: [Right-click on Mac \(https://support.apple.com/guide/mac-help/right-click-mh35853/mac\)](https://support.apple.com/guide/mac-help/right-click-mh35853/mac).




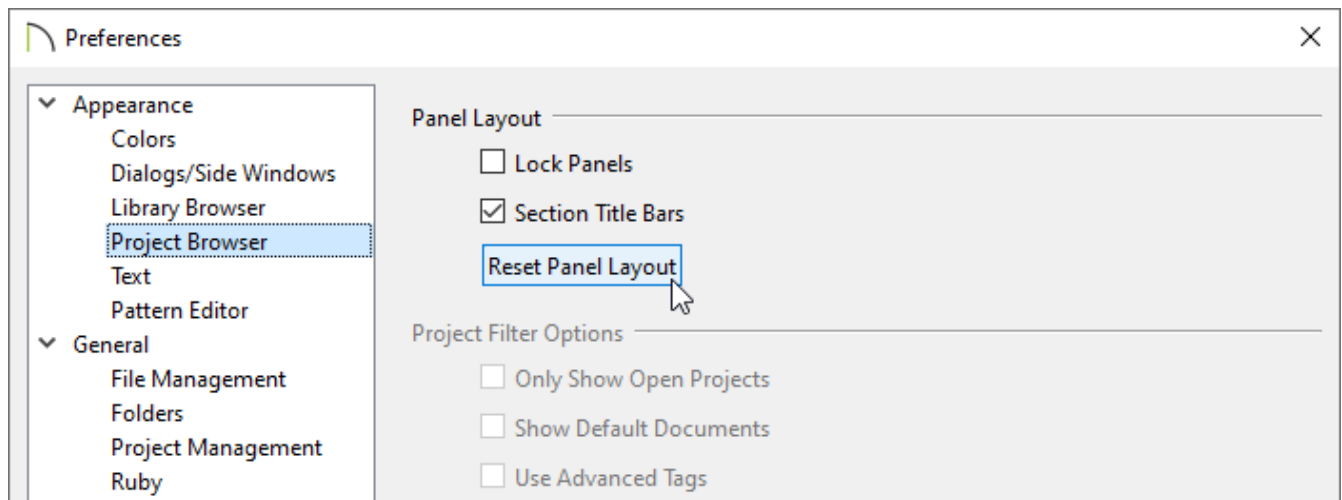
To move panels around in X17 and newer, drag the title bar associated with a panel around onscreen, and notice the panel will follow your cursor until you let go of the left-mouse button.





The height and width of a panel can be adjusted using the Splitter cursor that displays when hovering over the bar separating two panels; click and drag.




If you're using X17 or newer, you can reset the Project Browser's panels to their original configuration. To do so, access **Preferences** , click on the **PROJECT BROWSER** panel, then click on **Reset Panel Layout**.



Working with plans, layouts, and their subfolders

Located in the Project Browser is the Projects panel, which lists all plans and layouts that are open within the program. To open a file, navigate to **File> Open Plan**  or **File> Open Layout** .

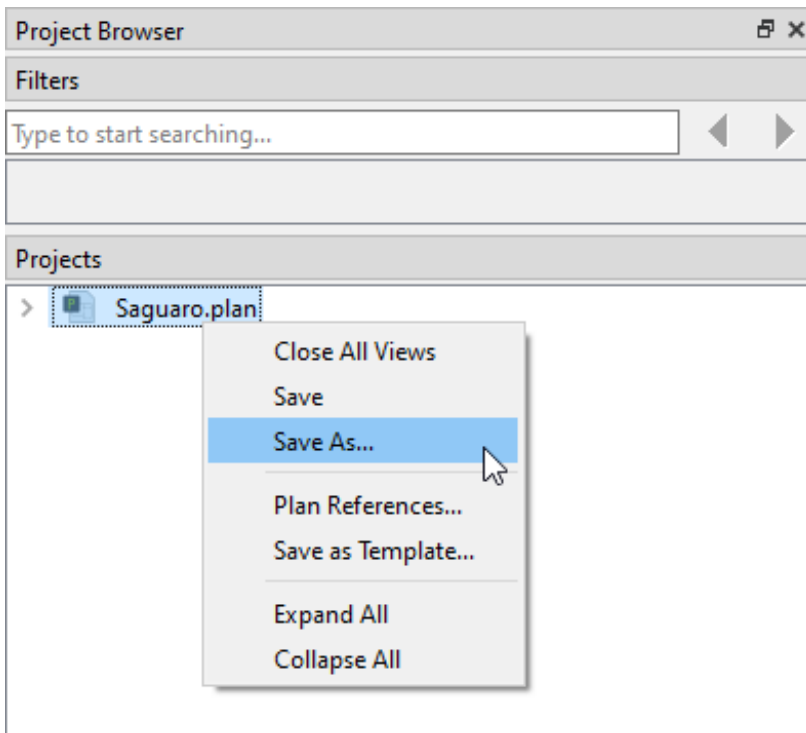
Note: You can navigate to File> Open Recent Documents to see a list of recently opened files to easily access them again.

Project files can be extracted and opened by navigating to **File> Import> Import Project** . To learn more about importing projects, please see the appropriate resource in the [Related Articles](#) section below.

Plan files that are referenced by another plan or layout will also appear in the Project Browser.

When working with plan and layout files using the Project Browser, familiarize yourself

with the options that are available in the contextual menu when right-clicking on a file.



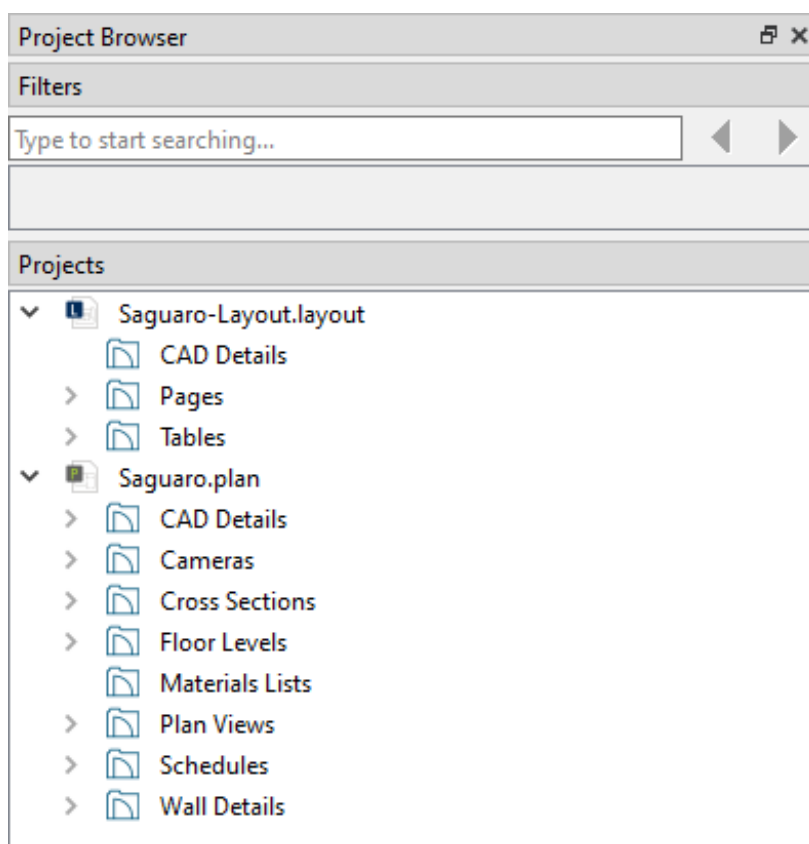
- **Close All Views** - Closes all views associated with a plan/layout, including the plan/layout file itself.
- **Save** - Saves the plan/layout.
- **Save As** - Opens the Save Plan/Layout File dialog in Windows Explorer/Finder where files can be saved to a specific location with a specific name.
- **Plan References** - Opens the Referenced Plans/Layouts dialog where files that are referenced can be viewed and replaced. Referenced files are commonly used with the Reference Display feature and for connected layout files.
- **Save as Template** - Opens the Save as Plan/Layout Template dialog where content can be removed for saving as a plan/layout template. See the [Related Articles](#) section below to learn more.
- **Expand All** - Expands a plan/layout and all subfolders.
- **Collapse All** - Collapses a plan/layout and all subfolders.

There are several subfolders located within plan and layout files, of which are associated with specific types of views. For plan files, this includes CAD Details, Cameras, Cross Sections, Floor Levels, Materials Lists, Plan Views, Schedules, and Wall Details. Layout files consist of subfolders for CAD Details, Pages, and Tables.

Note: Wall Details are a special type of wall elevation view in which only the studs, plates, and headers used to frame a selected wall will display. They are

also the only views in which Wall Bridging can be created. In addition to accessing these via the Project Browser, a Wall Detail associated with a specific wall can be accessed by selecting the wall in question and clicking the Open Wall Detail edit button.

There are variety of options available in the contextual menu when right-clicking on one of these subfolders, as well as the views or items within these subfolders; however, they will vary between plan and layout files, as well as the type of views or items.



The following contextual menu options are available when right-clicking on a plan or layout subfolder:



- **New Folder** - Creates a new, custom subfolder allowing for further organization.
- **New CAD Detail*** - Opens a New CAD Detail dialog where a Name can be specified. A new CAD detail window then displays.
- **Paste CAD Detail*** - Pastes a copied CAD Detail within the CAD Details subfolder or a nested subfolder. A new Saved Plan View then displays.
- **New Saved Plan View**** - Opens a New Saved Plan View dialog where a Name can be specified.
- **Select All** - Expands and selects all of the views or items within the subfolder.

- **Expand All** - Expands a subfolder and all its nested subfolders.
- **Collapse All** - Collapses a subfolder and all its nested subfolders.

**Applies to the CAD Details subfolder(s).*

***Applies to the Saved Plan Views subfolder.*

The following contextual menu options are available when right-clicking on a specific view or item within a subfolder:

- **Open/Close View** - Opens/closes the view.
- **Save Camera/Cross Section/Material List/View*** - Saves the view in it's currently active state.
- **Edit View** - Opens the Specification dialog for the selected view where changes can be made.
- **Delete** - Deletes the view or item. Selecting this option will prompt a Question as this will remove the view or item from the plan or layout. Proceed with caution when using this function.
- **Update Preview(s)**  - Updates the Preview pane in the Project Browser for the selected view or item.
- **Send to Layout**  ** - Opens the Send to Layout dialog where settings can be specified for the view prior to sending it to a layout file.
- **Rename** - Renames the view or item. When choosing this option, the view's name will automatically prompt a text field allowing for a new name can be specified.
- **Duplicate** - Opens a dialog where a Name can be specified. A duplicate of the selected view or item then displays.
- **Copy***** - Copies the CAD Detail view.
- **Cut***** - Copies the CAD Detail View, then prompts a Question asking if you want to delete the view. Clicking Yes will delete the view. Make sure to right-click on the desired CAD Details subfolder and choose Paste CAD Detail so your work is not lost.
- **Show Page****** - Displays the layout page.
- **Open/Close Page View****** - Opens/closes the page.
- **Edit Page Information****** - Opens the Layout Page Specification dialog where page information can be edited.
- **Delete Page****** - Deletes a layout page. Selecting this option will prompt a Question as this will remove the page from the layout. Proceed with caution when using this function.
- **Insert Page Before/After****** - Inserts a new layout page before or after the current page.
- **Duplicate Page****** - Duplicates a layout page.

- **Exchange With Previous/Next Page****** - Exchanges a page with the previous or next page.
- **Find in Project******* - Locates and selects the table or schedule. When this option is selected, the page or view the table or schedule is on will become active.
- **Open Object******* - Opens the Revision Table or Schedule Specification dialog where changes can be made to the table or schedule.
- **Add to Library******* - Adds the table or schedule to the User Catalog within the Library Browser.

**Applies to open views located in the Cameras, Cross Sections, Materials Lists, and Plan Views subfolders.*

***Applies to views located in the CAD Details, Cameras, Cross Sections, Plan Views, and Wall Details subfolders in X15 and newer.*

****Applies to views located in the CAD Details subfolder in X16 and newer.*

*****Applies to layout pages located in the Pages subfolder.*

******Applies to schedules and tables located in the Tables and Schedules subfolders.*


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Related Articles

- 📄 [Creating and Using Layout Templates \(/support/article/KB-00737/creating-and-using-layout-templates.html\)](/support/article/KB-00737/creating-and-using-layout-templates.html)
- 📄 [Creating and Using Plan Templates \(/support/article/KB-00463/creating-and-using-plan-templates.html\)](/support/article/KB-00463/creating-and-using-plan-templates.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)
- 📄 [Exporting Projects and Disconnected Files \(/support/article/KB-03212/exporting-projects-and-disconnected-files.html\)](/support/article/KB-03212/exporting-projects-and-disconnected-files.html)
- 📄 [Importing Projects \(/support/article/KB-03213/importing-projects.html\)](/support/article/KB-03213/importing-projects.html)
- 📄 [Understanding Saved Plan Views \(/support/article/KB-03185/understanding-saved-plan-views.html\)](/support/article/KB-03185/understanding-saved-plan-views.html)
- 📄 [Using Layout Template Pages \(/support/article/KB-03018/using-layout-template-pages.html\)](/support/article/KB-03018/using-layout-template-pages.html)
- 📄 [Working With the Project Browser Using Project Management \(/support/article/KB-03217/working-with-the-project-browser-using-project-management.html\)](/support/article/KB-03217/working-with-the-project-browser-using-project-management.html)



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