autodesk®

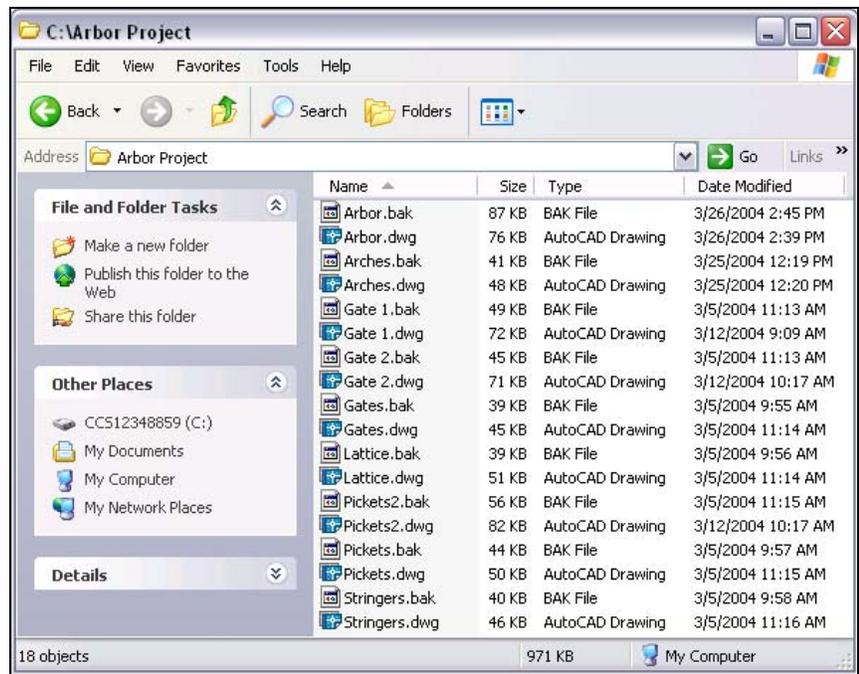# Sheet Set Manager: Organize Your Drawings

Dieter Schlaepfer, Autodesk, Inc.

You may have heard that the new Sheet Set Manager in AutoCAD® 2005 software can manage, publish, and transmit an entire group of project files. But did you know that you can use the Sheet Set Manager simply to organize and access your existing drawings much more effectively?

There is almost no effort required, and you do not have to change the way you work!

What Most People Do

Most people organize their drawings by saving them in one or more folders. This method is familiar and fairly convenient, but it relies on your file naming conventions, the Date Modified field, and your memory to access them. It's easy to get confused.

These are the files in my *Arbor* folder, which contains the drawings that I used to build an arbor and picket fence. Many months have passed, and I don't remember exactly which drawings are which.

In AutoCAD, the Open dialog box provides thumbnail images, but no descriptions are available in the dialog box. You can group drawings into additional folders, but "mousing" through nested folders looking for a drawing is slow and tedious.

Contents

- What Most People Do
- How to Organize a Project Using the Sheet Set Manager
- How to Convert Existing Drawings
- How to Create a Sheet Set
- How to Organize the Sheets in a Sheet Set
- How to Open a Sheet Set and Access the Drawings
- How to Move Sheets Between Subsets
- How to Add a New Sheet to a Sheet Set
- Where to Go from Here

How to Organize a Project Using the Sheet Set Manager

With the Sheet Set Manager, you can create "links" to drawings called *sheets*. Sheets can be organized under logical headings called *subsets*, can display thumbnail images and descriptions, and can be used to open the drawings.

Create, remove, rename, and reorder subsets and the sheets in them. Subsets can contain other subsets to organize a large or complex project. You can easily locate, open, and switch between the sheets listed in subsets.

Create, remove, rename, and reorder sheets. Removing a sheet does not affect the drawing to which it serves as a link.

You don't need to use these two tabs when you use Sheet Set Manager merely to organize your drawings.

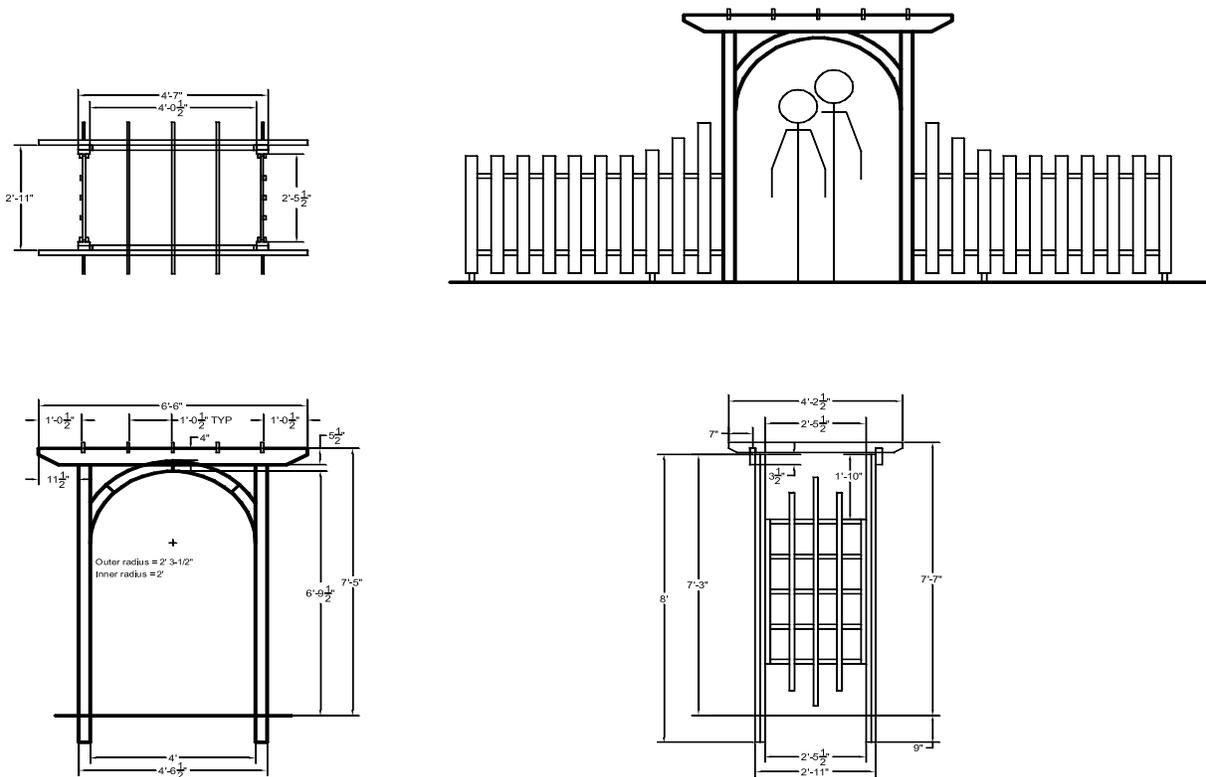Display a thumbnail image or a description of the drawing associated with the sheet.

Save screen space with Auto-hide. If Auto-hide is turned on, the Sheet Set Manager window rolls up out of your way when you move the mouse cursor off the window.

Sheet Set Manager provides a powerful collection of features for organizing, transmitting, publishing, and archiving sheets. However, you don't need to use all of these features to use the Sheet Set Manager as a drawing organizer.

How to Convert Existing Drawings

If you already use layout tabs, you can link them to sheets in a sheet set directly. No conversion is necessary. You can skip to the next page. Otherwise, read on.

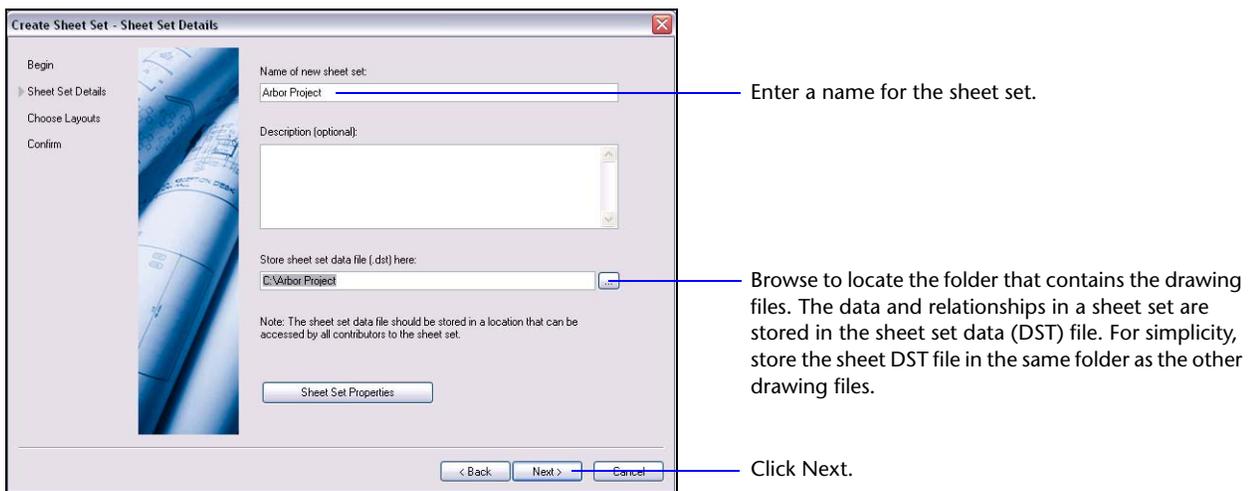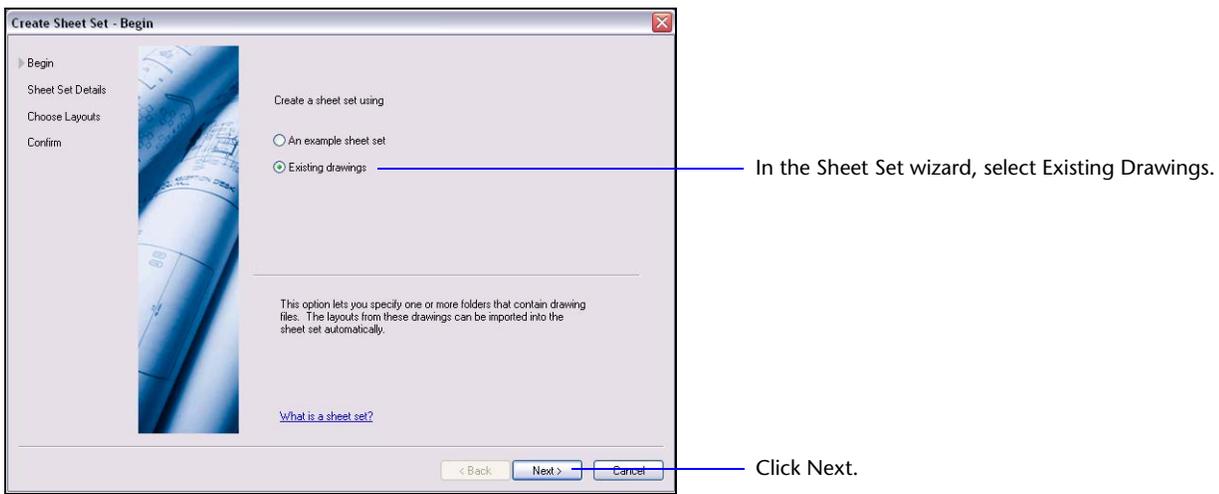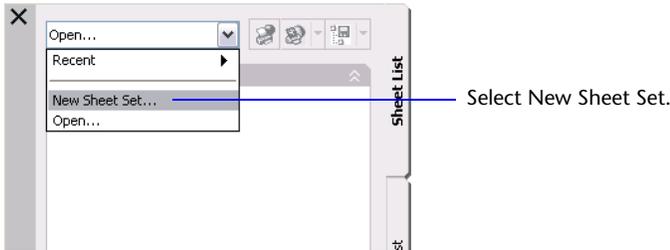Here is my arbor design, which I originally created using the Model tab only.

If you typically create drawings without using layout tabs, you need to create a layout in each drawing:
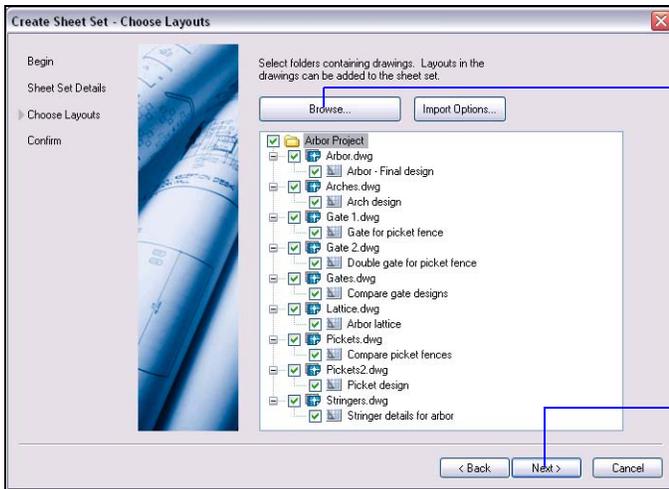
- Open each drawing and click the Layout1 tab.
- Right-click the Layout1 tab and rename the layout to something more descriptive.
- Save the drawing.

This layout tab will serve as your thumbnail image for the sheet in the Sheet Set Manager.

How to Create a Sheet Set

If necessary, open the Sheet Set Manager by entering **ssm** at the AutoCAD Command prompt.

Select New Sheet Set.

In the Sheet Set wizard, select Existing Drawings.

Click Next.

Enter a name for the sheet set.

Browse to locate the folder that contains the drawing files. The data and relationships in a sheet set are stored in the sheet set data (DST) file. For simplicity, store the sheet DST file in the same folder as the other drawing files.
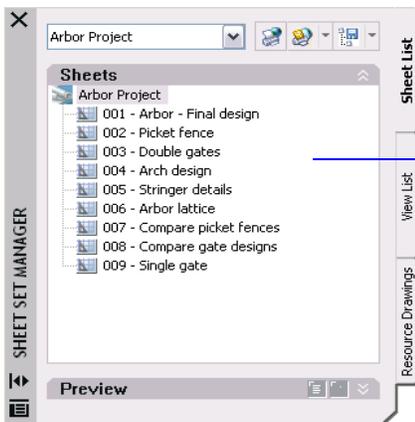
Click Next.

Click Browse and locate the folder that contains the drawing files that you want to organize. The drawings in the folder are listed along with their layouts.

Click Next to generate the sheets in the sheet set and close the wizard.

The Sheet Set Manager now lists the sheet names, each of which is a combination of an automatically assigned drawing number, the drawing file name, and the layout name. Remember, each sheet is simply a link to a layout in a drawing file.
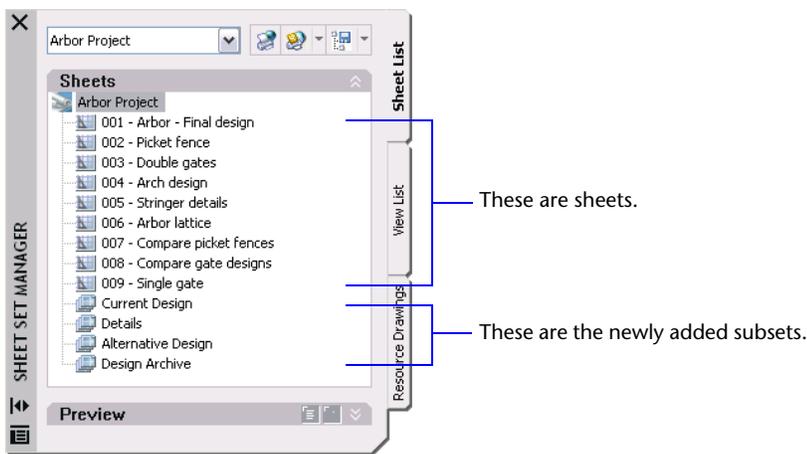

You can change the titles and numbers of these sheets at any time. Right-click the sheet, and then, on the shortcut menu, click Rename & Renumber. (Changing the name of a sheet has no effect on the drawing file.)
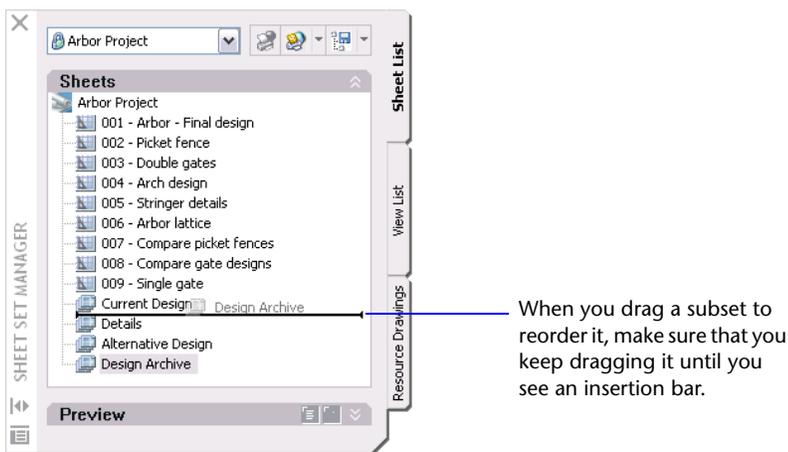
How to Organize the Sheets in a Sheet Set

You can group your sheets logically using subsets. For my arbor project, I decided to use four subsets: Current Design, Details, Design Archive, and Alternative Design.

- To create each subset, right-click the sheet set node, Arbor Project in this case, and then, on the shortcut menu, click New Subset.
- Enter the name of the subset, and repeat the process for each additional subset.

The result looked like this when I had finished.

These are sheets.
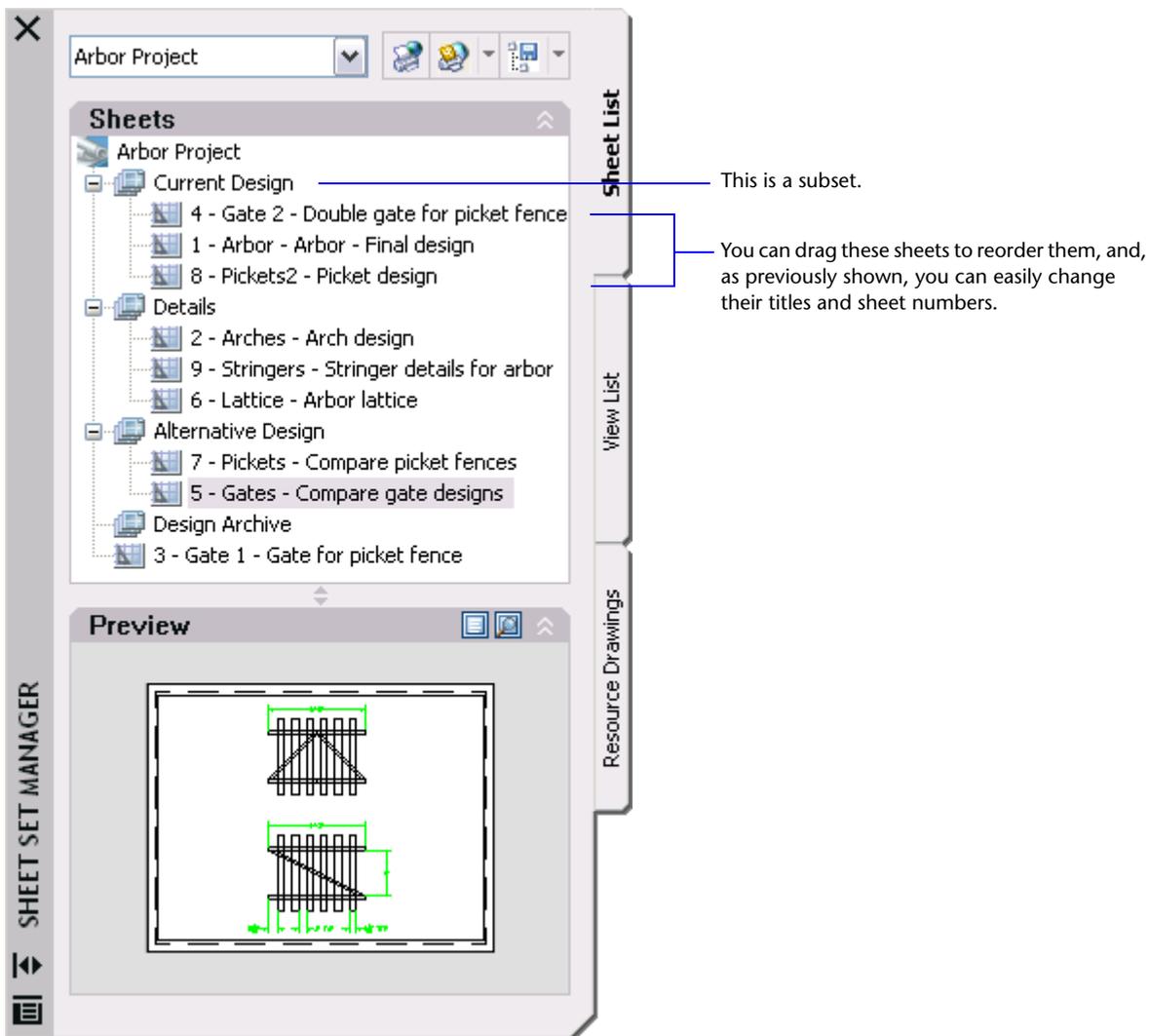
These are the newly added subsets.

After creating the subsets, I wanted to switch the order of the last two subsets. Because an element on the list can't be dragged to the last position in the list, I dragged the Design Archive subset up above the Alternative Design subset.

When you drag a subset to reorder it, make sure that you keep dragging it until you see an insertion bar.

Next, I dragged each sheet into a subset. When you drag the first sheet into a subset, make sure you drag the sheet on top of the subset name, not above or below it.
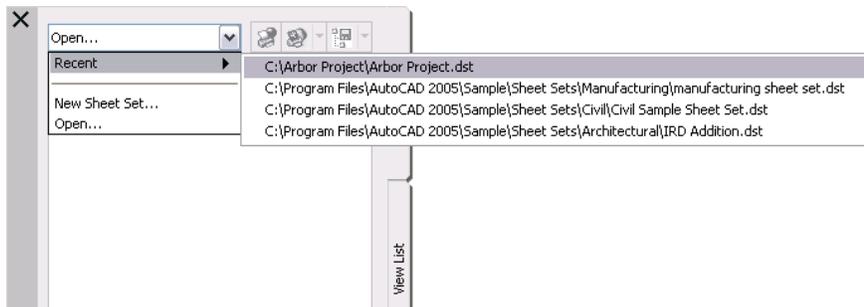
The result looked like this.

This is a subset.

You can drag these sheets to reorder them, and, as previously shown, you can easily change their titles and sheet numbers.

As I mentioned before, you can create subsets within subsets when organizing complex projects.

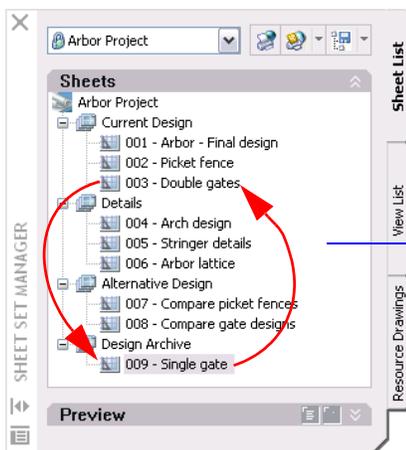# How to Open a Sheet Set and Access the Drawings

When you need to open a sheet set, you can select a recent one as shown, or you can open and navigate to the folder that contains the sheet set data (DST) file.

- Once a sheet set is open, you can click any sheet in the list to preview its thumbnail image or its description.
- If you double-click a sheet, the drawing linked to the sheet opens. If a drawing is already open, double-clicking the sheet makes it the current drawing.
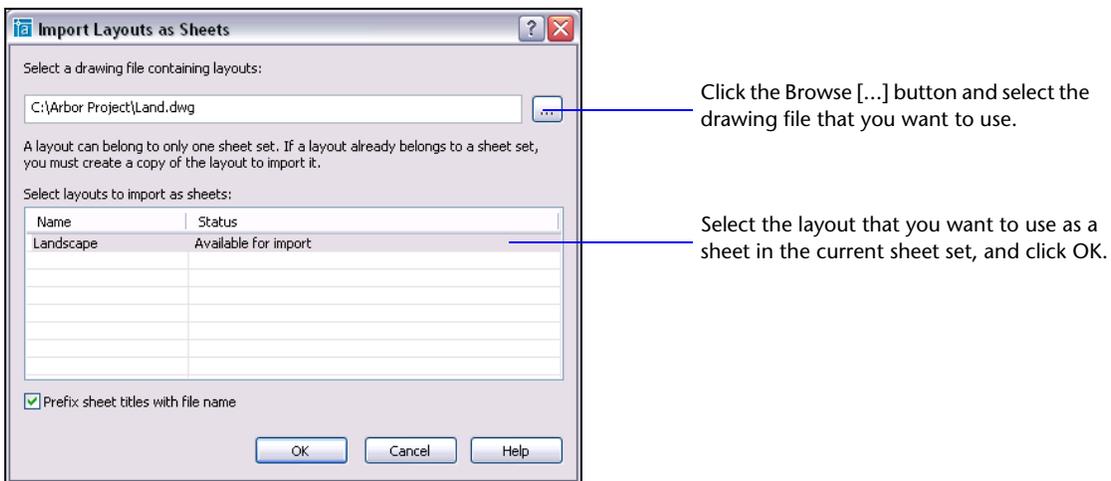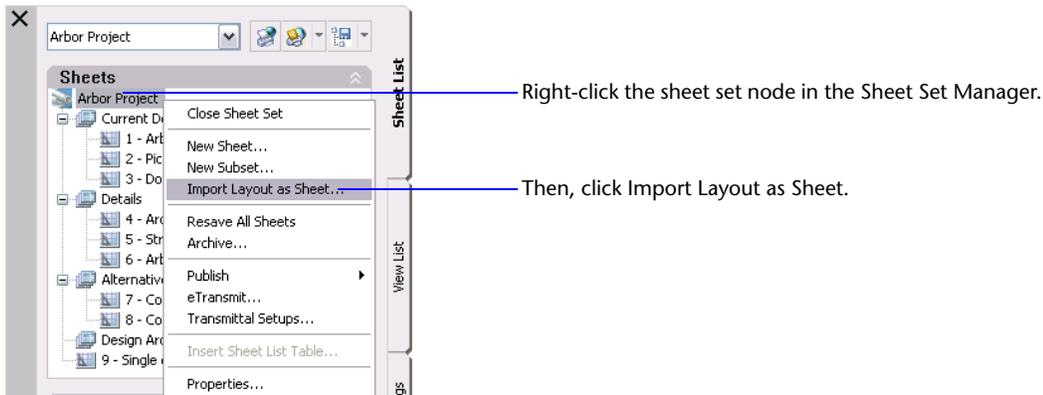
How to Move Sheets Between Subsets

When I created the arbor and fence design, I started with a single gate in the picket fence and then later changed my design to a double gate. If I wanted to return to my original design, I could simply switch the two sheets by dragging them between subsets. In this case, my subset organization ensured that I always knew which drawings were used in my current design.

Dragging sheets between subsets is an easy, visual method to reorganize the sheets in a sheet set.

How to Add a New Sheet to a Sheet Set

If you create a new drawing, you can easily add it as a sheet to the current sheet set.

Right-click the sheet set node in the Sheet Set Manager.

Then, click Import Layout as Sheet.

Click the Browse […] button and select the drawing file that you want to use.

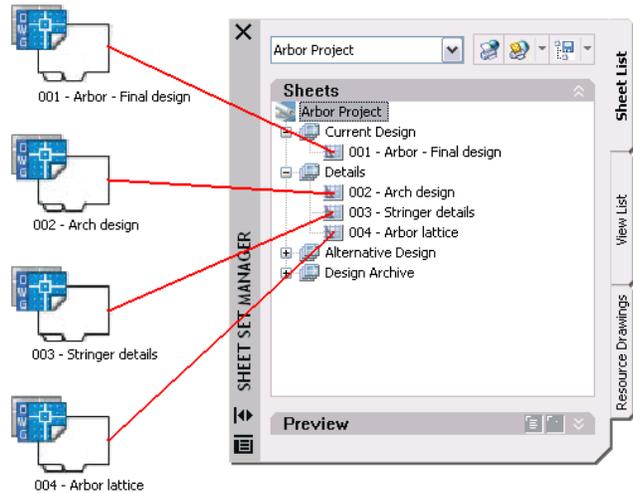Select the layout that you want to use as a sheet in the current sheet set, and click OK.

In the Sheet Set Manager, drag the newly imported drawing layout from the bottom of the list of sheets into any subset.

Where to Go from Here

Using the Sheet Set Manager to organize your projects is a great start. From here, you can take advantage of many other features in the Sheet Set Manager. For example:

- Publish your sheet set as a batch or publish specified subsets
- Transmit or archive sheet sets
- Manage views, generate labels and callouts automatically
- Create a table of contents for a title sheet automatically
- Create new drawings directly from the Sheet Set Manager that automatically use preassigned drawing template files and folder locations
- Communicate and coordinate with members of a design team far more effectively than before

You can easily tap into these additional capabilities. The next articles in this series show you how.

For additional information about Sheet Set Manager, see the "Work with Sheets in a Sheet Set" topic in the AutoCAD *User's Guide*. To locate this topic in the Help system, enter "work with sheets in a sheet set" (with the quotes) on the Search tab.

autodesk