



## [Organise Drawings with Sheet Set Manager]

### [AutoCAD]

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AutoCAD Tip: Organise Drawings with Sheet Set Manager

Sheet Set Manager is a very effective tool which can manage, publish, and transmit an entire group of project related files. However, it is also possible just to use Sheet Sets to organise and access current drawings more efficiently.

Many users organise and store their drawings into a series of folders which is convenient and familiar, however it does rely on user discipline relating to file and folder naming conventions, the modified date field and one's memory to access them at some point in the future! If you are anything like me, I sometimes forget where files are even later the same day!

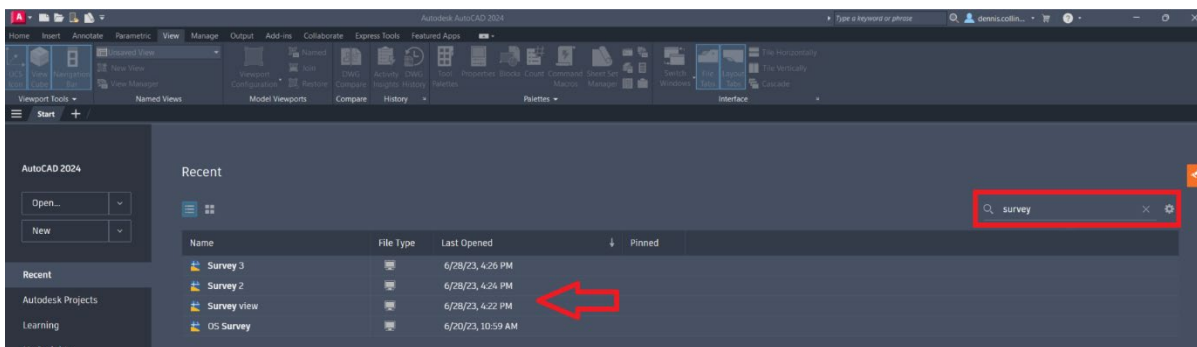
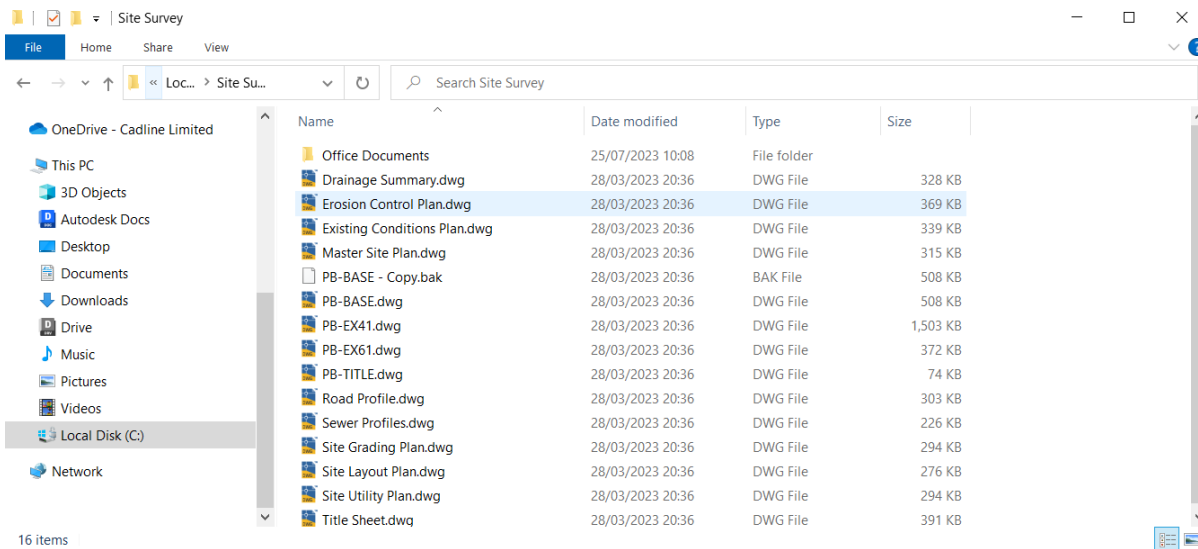


Fig 1. AutoCAD's improved start page search is a step in the right direction in trying to locate a drawing in file history.

Within AutoCAD, the Start Tab or Open dialogue box provides thumbnail images of recently accessed files, but no descriptions are available within the dialogue box. Although drawings can be in additional folders, scrolling through these nested folders looking for a particular drawing is often a slow and tedious process. Recent improvements in AutoCAD now provides users to search for a particular file which can refine the list somewhat. But there is a more effective way to locate files that might have been modified in the more distant past or by a different user.

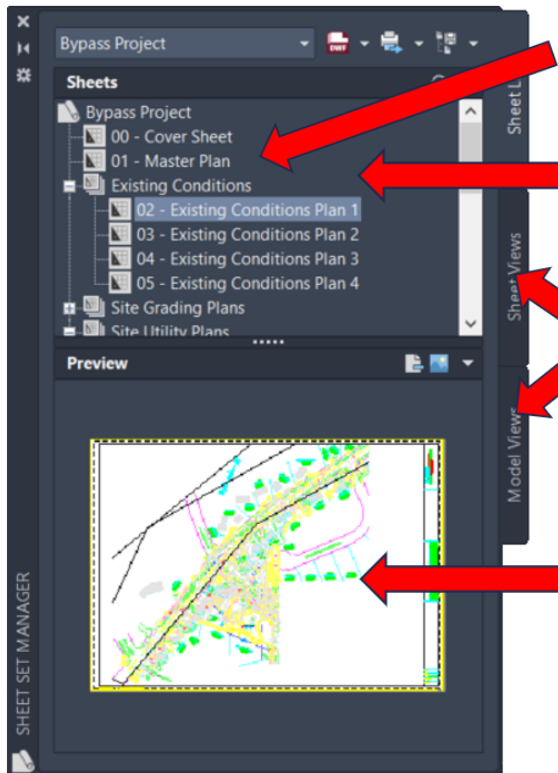


*Fig 2. Accessing files from Windows Explorer can be problematic if you cannot remember which drawings need to be accessed. Beyond filenames and date modified finding the right drawing is something of a lottery!*

However, with the introduction of Sheet Set Manager (in 2005) it is possible to create “links” to drawings called sheets. These sheets can be organised into logical groups called Subsets and can display thumbnail images and descriptions and can be used to open drawings.

## Commonly Used Terms

- A Sheet Set is a collection of Sheets, which can be thought of as a project. A sheet set has a file containing additional information like project name job number and many other project related settings.
- A Subset is a group heading located beneath the sheet set name which can facilitate the organisation of multiple sheets.
- A Sheet is a link to an AutoCAD drawing file ready to be printed or issued.
- A View, a user defined area saved in a drawing file, typically assigned to a sheet.
- DST, A Sheet Set Data File, this file contains all the project information relating to Sheet Set related files. Includes Project Name, Number, List of Sheets, Subsets, and sheet names etc.
- SSM, Sheet Set Manager, also the command shortcut which will open the Sheet Set Environment.



Right Click to create, remove, rename Subsets. Drag to Reorder Subsets and the Sheets within them. For larger projects it is possible to nest subsets. Users can easily locate, open and switch between the listed sheets in subsets.

Right Click to create, remove or rename Sheets. Drag to reorder sheets. Removing a sheet just removes the link, it does not affect the original drawing.

If just using Sheet Set Manager to organise your drawings these 2 tabs can be ignored.

If enabled a thumbnail or a description of the drawing associated with the sheet.

Although Sheet Set Manager possesses a suite of functions for organising, transmitting, publishing and archiving sheets, we can just use the Manager as a simple drawing organiser and worry about all the additional features for a later time.

It is easy to convert existing drawings to work with sheets sets, if the existing drawings have been setup with Paper Space Layout tabs. These can be linked to sheets in a sheet set directly.

If not open the drawings which contain entities within Model Space (the Model Tab) The file below is a simple housing plot layout drawn in metres, within model space.

Switch to the Paper Space Layout and follow the simple steps below.

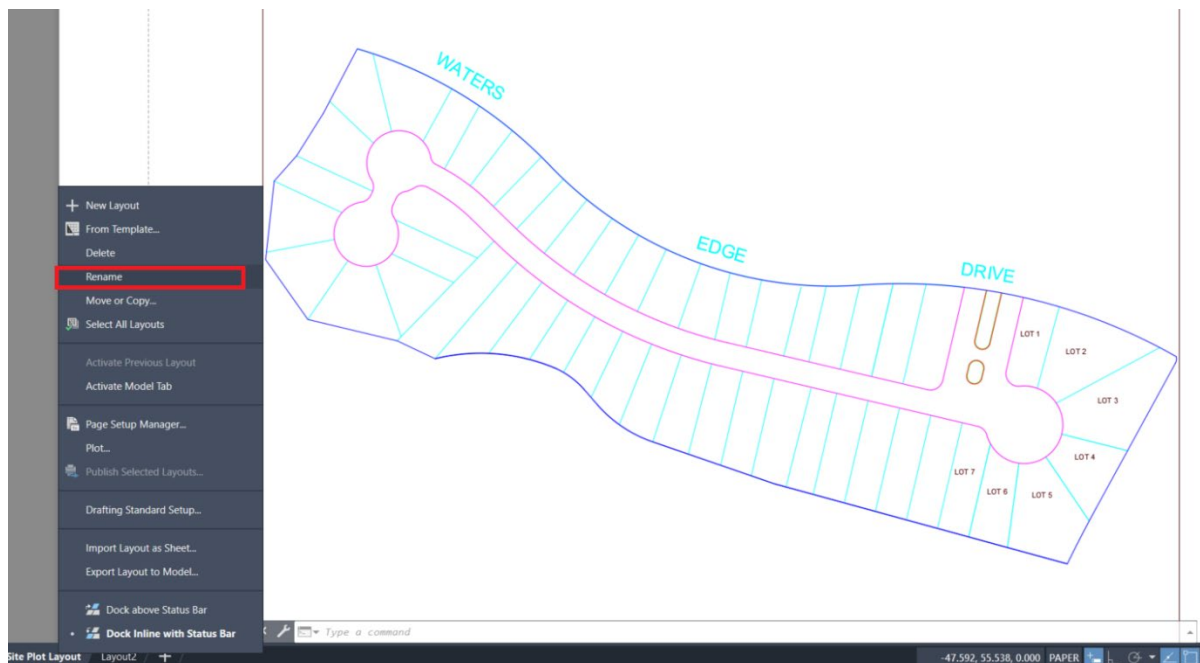


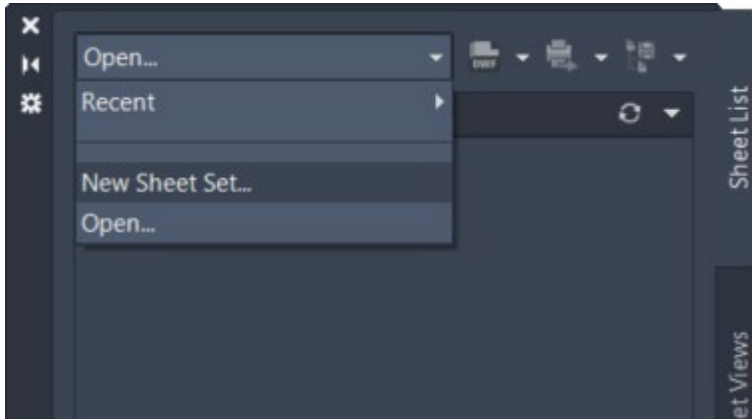
Fig 3. In the example Housing Development file, switch to a layout tab and rename it for easy future reference.

- Click on the (Paper space) Layout tab (usually Layout1)
- Right Click the layout tab and rename it to something more descriptive.
- Save the drawing.

The renamed layout tab will display as a thumbnail image for the sheet in the Sheet Set Manager.

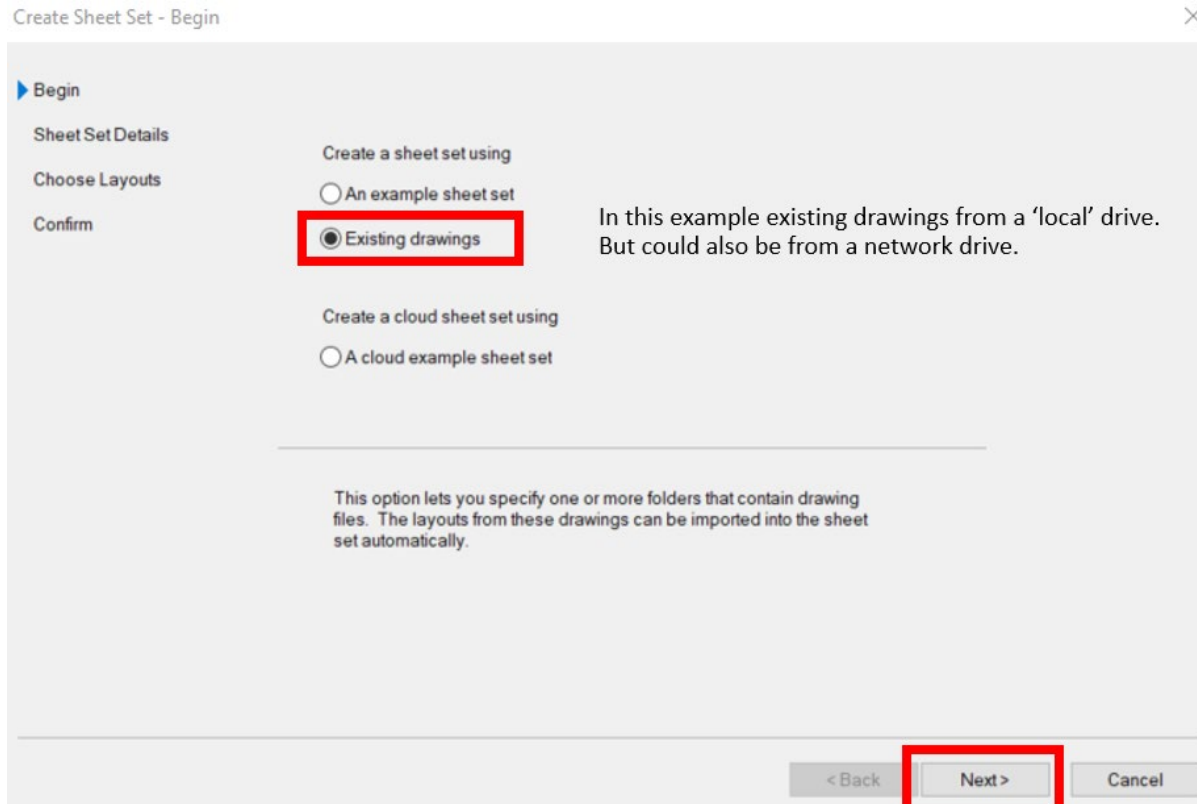
### Creating a Sheet Set from existing drawings

Access the Sheet Set Manager (SSM – Shortcut) via the Views tab on the Ribbon Menu in model space or Layout tab, if in Paper Space.



#### Choose New Sheet Set

A Create Sheet Set Wizard will initialise offering a choice to create a Sheet set from an example Sheet Set template or a from existing drawings.



Once the existing drawings is select, it is possible to name the sheet set and locate a project directory where the existing drawings reside. The Sheet Set data and relationships are stored in a Sheet Set Data file (DST). To keep things simple, it is usually recommended to save the DST file in the same directory as the other drawing files.

Create Sheet Set - Sheet Set Details

Begin  
Sheet Set Details  
Choose Layouts  
Confirm

Name of new sheet set:  
New Housing Development

Description (optional):  
New proposed development for Camberwick Green

Store sheet set data file (.dst) here:  
C:\Site Survey

Note: The sheet set data file should be stored in a location that can be accessed by all contributors to the sheet set.

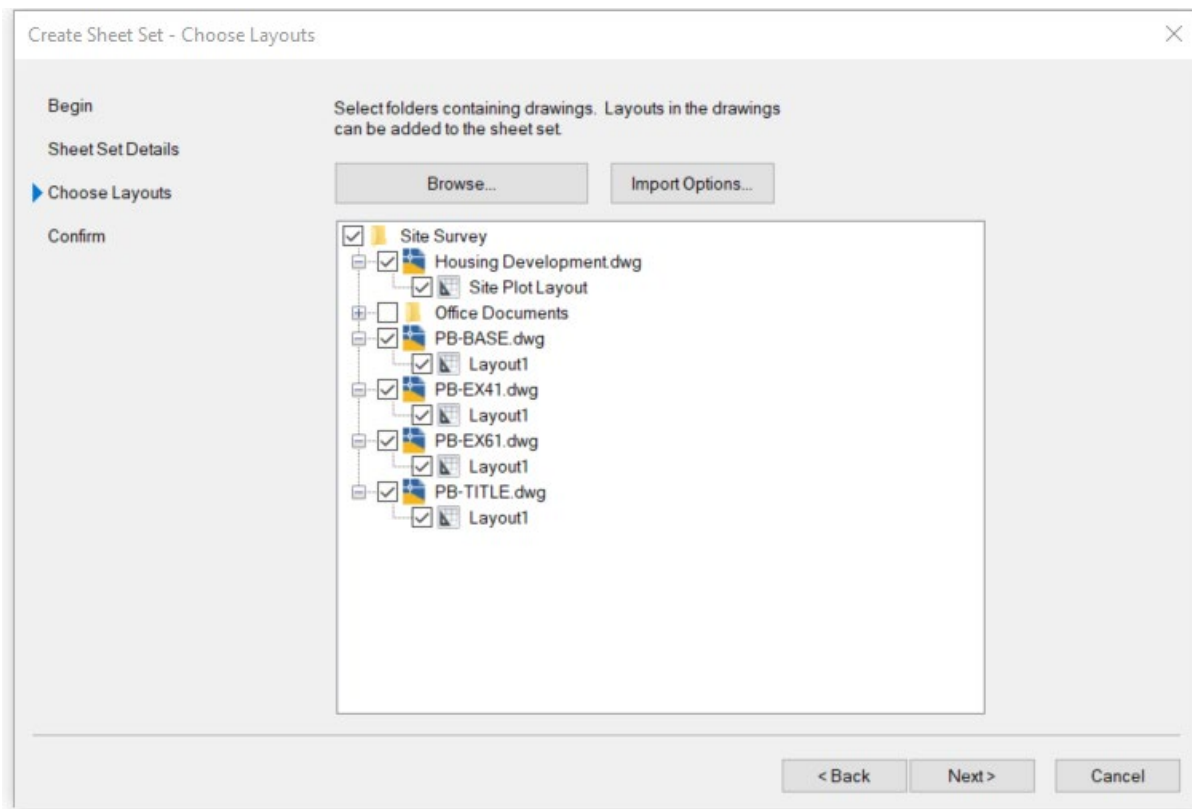
Sheet Set Properties

Sheet Set Properties can be set or edited here.

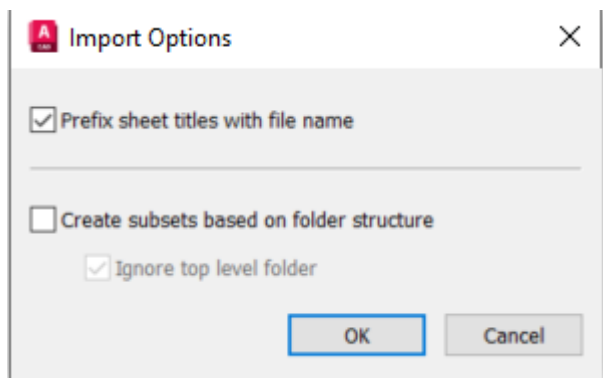
< Back Next > Cancel

NB. If the sheet set is saved onto a network server or in the Cloud. The folder holding the sheet set information needs to be accessible to all users who will work on the project.

If required multiple folders can be selected. These directories will then be displayed with the resident drawings and named layout tabs being displayed as per the image below.



The sheet set manager compiles a list of sheet names, which is formed by combining an automatic drawing number, the file name, and the layout name. At this stage no drawings are created these are just links to a layout in a drawing file. Like a hyperlink.



Sheet naming options can be set within the Import Options dialogue.

The next dialogue is just a confirmation of Sheet Names and Number, and a summary of what files were used and locations.

Begin

Sheet Set Details

Choose Layouts

Confirm

Sheet Set Preview:

New Housing Development

- 1 Housing Development - Site Plot Layout
- 2 PB-BASE - Layout1
- 3 PB-EX41 - Layout1
- 4 PB-EX61 - Layout1
- 5 PB-TITLE - Layout1

Note: Creation of the sheet set is complete only after each sheet in the sheet set has been opened and saved.

**New Sheet Set**

Sheet set name:  
New Housing Development

Sheet set description:  
New proposed development for Camberwick Green

Sheet set storage location:  
C:\Site Survey\

Sheet set data file:  
New Housing Development.dst

Model view:

Label block for views:

< Back   Finish   Cancel

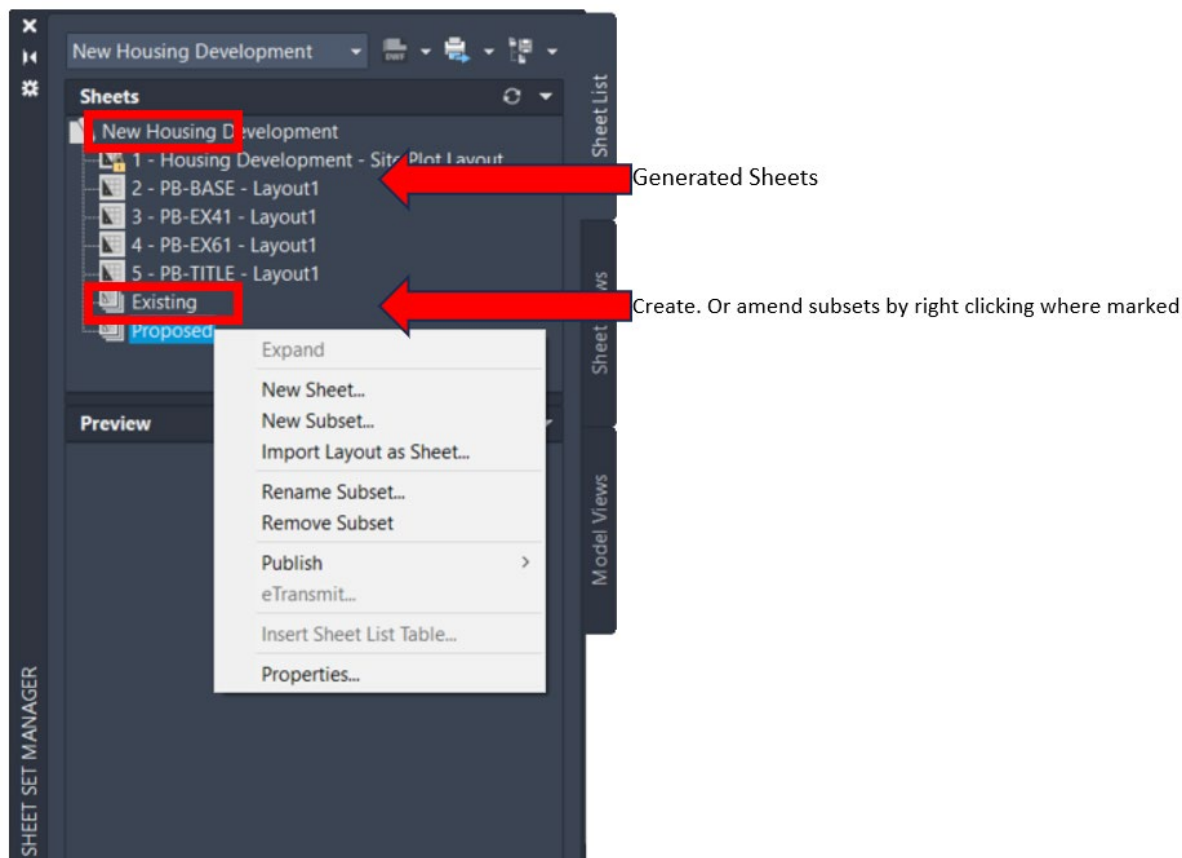
Clicking on finish will update the DST (Sheet Set) File with added sheets, names, and other properties.

### Organising Sheets within a Sheet Set

Sheets can be sorted within a sheet set with subsets. In the example below 2 subsets have been created, one named Existing and one as Proposed. These can be added, removed, or renamed by a right-click menu.







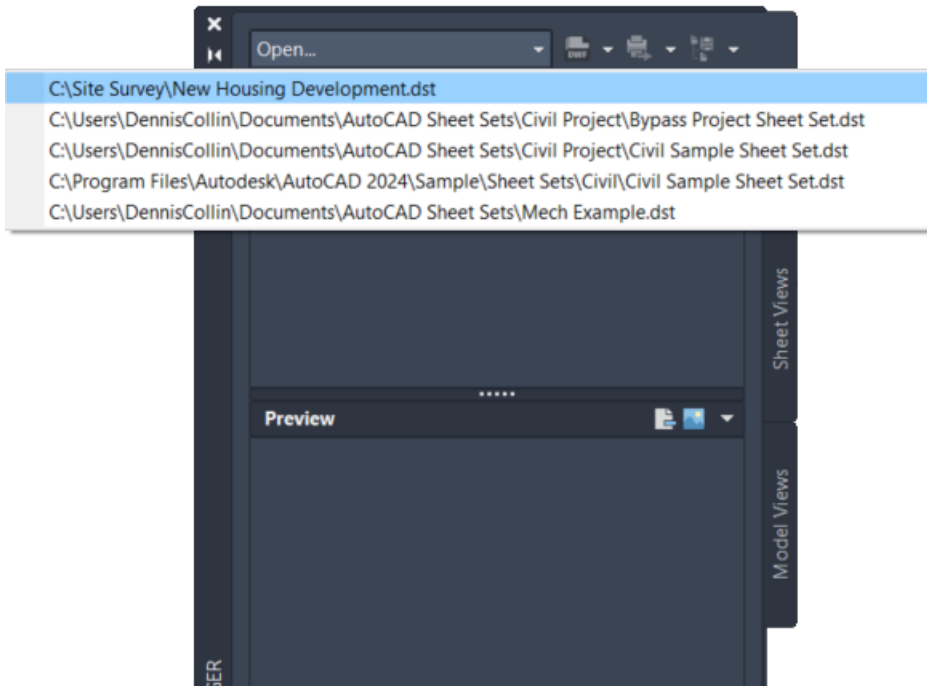
To place the sheets into subsets, simply drag and drop a specific sheet into a required subset, very much like the behaviour in Windows explorer. The subsets can be reordered or moved in the same way.

Right click the relevant object to change titles and sheet numbers. For larger projects consider creating nested subsets for greater control.

### Opening the Sheet Set Manager and accessing new or existing drawings.

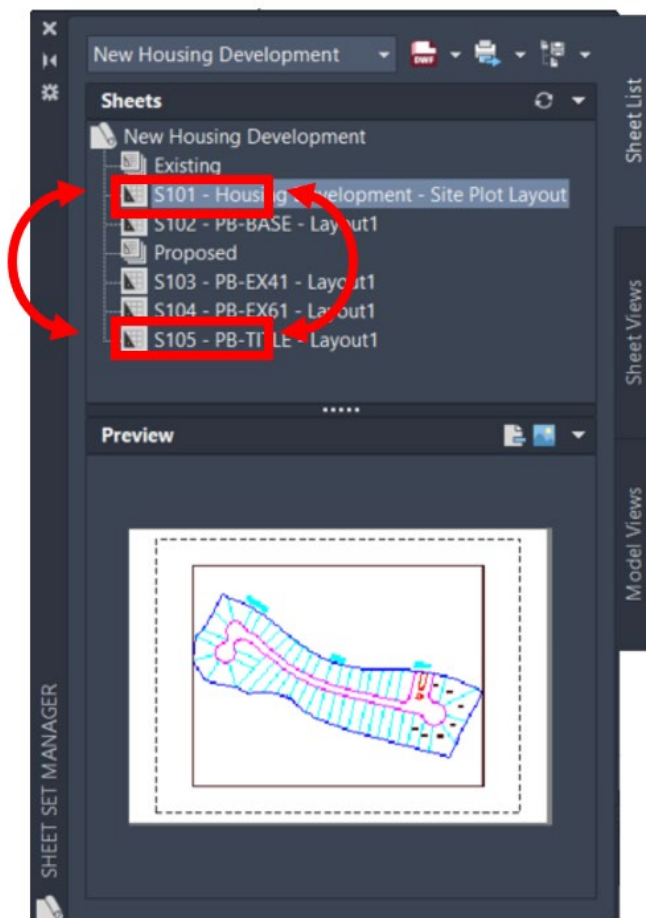
To open a Sheet Set, users can either access the recent File open history on AutoCAD's Start Page. Or access the Sheet Set Manager (SSM Shortcut) and browse the history or open dialogue there. Once open just browse to the DST, typically located in the main folder, and click to open.





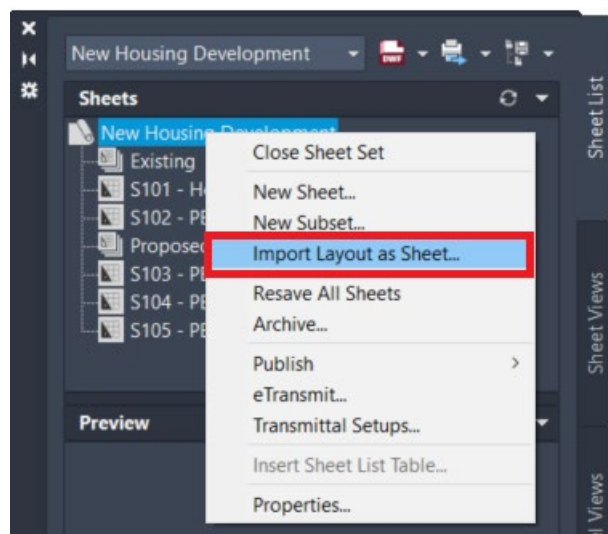
- Once the sheet set is open, click on any sheet to preview the thumbnail image or its description.
- Double Clicking on a Sheet, will open the linked drawing. If the file is already open, the double click action makes that file current.

This functionality alone makes working with Sheet Set Manager more useful than using conventional file access methods like Windows Explorer.



Drag elements around to arrange as desired

If additional drawings are created and need to be added to the Sheet Set this is easily done. Open the Sheet Set Manager and open the required sheet set that will receive the new drawings.



Import Layouts as Sheets

X

Select drawing files containing layouts:

Browse for Drawings...

A layout can belong to only one sheet set. If a layout already belongs to a sheet set, you must create a copy of the layout to import it.

Drawing Name	Layout Name	Status
<input checked="" type="checkbox"/> Tree Planting Block....	36X48	Available for import

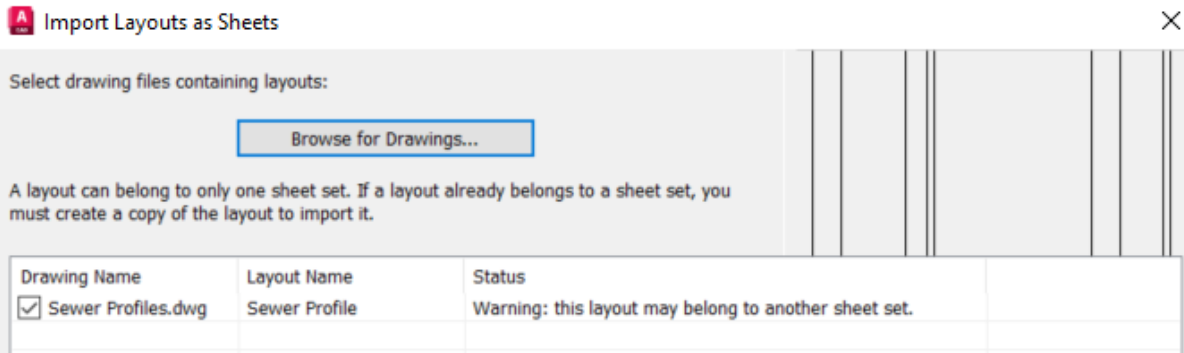
☒ Prefix sheet titles with file name

Import Checked

Cancel

Help

It is worth remembering that a layout can only belong to one Sheet set at a time. If the layout already belongs to another sheet set, the layout will report as being unavailable for import. Therefore, the layout must be copied to complete the import process.



Once imported drag the newly imported drawing layout into the appropriate subset and name and number as required.

## Summary & Conclusion

Using the Sheet Set Manager to organise your drawings a great start to improving one's efficiency using AutoCAD. For further efficiency savings it might be worth looking at other features, such as:

- Use Sheet Set Manager to Batch Publish (Plot/Export) specified Sheets or subsets.
- Transmit or Archive Sheet Sets.
- Manage Views, generate labels or callout bubbles automatically.
- Create a Sheets List
- Create new drawings from the SSM, with pre-determined Templates and folders.

I will post more on these Sheet Set Manager benefits on a future white paper. These tools along with the new collaborative tools like Trace, Import Markup, Drawing Compare and Shared Views can be real 'game changers' when communicating and coordinating with fellow design team members and clients.