



## **MasterTemplate ARCHICAD TRAINING – Using MasterTemplate Part 4 - MasterTemplate Customization Training**

Welcome everyone to the MasterTemplate training. Today is Tuesday, December 20, 2011. This is Eric Bobrow speaking to you from San Rafael, California where it is a beautiful, chilly day as we lead into Christmas and the holiday season. Thanks for taking the time to join me today live or on the recording. I'm going to be focusing on customization of MasterTemplate. We have had several sessions going over the basic use of MasterTemplate, explaining all the parts and how you approach them or what they're for. [0:00:45]

Today we will focus a large part of this session on how to customize MasterTemplate; the things that are easy to do, the things that are harder to manage that are very much a part of what you would expect to do, and then some other options that you might consider. So what we're looking at right now is the sample project for MasterTemplate. I'm going to open up the template. When we download MasterTemplate, it ends up being on our hard drive and it goes into a folder. So after you unzip it, you'll have something that has the name of the template. So in this case, I'm working with one for ArchiCAD 15 U.S. version. [0:01:35]

It will have some linked files that will have additional materials or files that are used within the template. These are the main core files that are worked with. I'm going to open up the template itself here and I will launch a new instance so I can keep the sample file available in case we need to look at it. So when you first download it, it does not know where things are located on your hard drive. You will have to clean up some of the links. And I've already got over that. There's a whole video in the MasterTemplate website for basic installation, but I will very quickly clean up a couple of links here and then look at how you can start saving your customized version and what changes you should be making as you get going. [0:02:30]

So it's opening up right now in a new instance of ArchiCAD. We'll start getting some messages that we need to understand and clean up. [13 second pause] Now I said I'd like to open it, and let's see whether it actually recorded this as the template. You can see as I move this floor plan over, it says "Untitled". So in this particular case, I'm working with a copy of the template rather than the .tpl file itself. It's important to note that when you're working with the template, you could be working with a copy of it or with ArchiCAD having bookmarked and essentially recorded as working on the template itself. So when you hit save, you need to understand what it's doing. [0:03:39]

So right now "Untitled" is perfectly fine, because what I'd like to do is clean up the links and then save a copy of it. But if you do want to edit the template that you have already been working on, then you will want to make sure it has the name at the top rather than "Untitled". Also, you'll notice that the size of the window is a little odd. I'm going to click on the zoom here for the windows so it fits in nicely. I have



found one thing that can be useful if you change your screen resolution regularly. I go to the work environment here and say that I'd like to have something that has been recorded. For example, for the screen size that I'm working with frequently for presentation, I saved a palette scheme. And I say Apply and say OK. What's going to happen is not only are the palettes moved into certain positions, but if I go to, for example, the Interactive Legends you can see also that this window here is carefully sized to fit in. So it will remember the other sizes of the windows here. [0:04:52]

Let me bring this back into position. The error messages that I was expecting to see did not come up. Let's go to the External Content, Hotlink Manager and make sure that this is cleaned up. So the hotlinks in all versions of MasterTemplate, with the exceptions of the ones for Start Edition, are the extra files for the legends and favorites that are linked into the project. They may say that they're missing if it doesn't understand where to find them. So I will say relink this, and I need to tell it where to locate it. It is in the "MasterTemplate Linked Files" folder, and I'm going in alphabetical order. So the first one is Legends. I will highlight that and say select, and then I repeat the process for each of these, selecting each one in turn, and relinking all three of them. [0:06:04]

Once I have done that and say OK, it will make sure that I have that up to date. That's one part of the cleanup that is required the first time you install MasterTemplate. We'll also want to go to the Drawing Manager and make sure that the links for the specifications files are up to date. So go to File, External Content, Drawing Manager. This is one way you can get drawing manager open. And you can also open in the navigator by using this command on the right side, they are equally the same. Here is drawing manager. When I open this up wider, we'll see that there are some things that are missing here. The logo in this case is something that we are going to customize anyway. What I'll do is tell it that these particular ones that are all identical, if they are missing, I am going to link them. And when I say link, it says, "What file do you want to link it to?" And I'll say "External Source" and browse. And here you can see the logo file is in this "Linked Files" folder that is supplied with MasterTemplate. So that's going to be all updated. [0:07:26]

The ones that are a little more complicated are the ones that have to do with the specifications. In the latest version of the template, I have cleaned this up and simplified it so that each one of these general notes and specifications documents is an entire page image on a sheet. There are sheets 8, 9 and 10. And then in the other set of layouts for the larger combinations there are 26, 27, 28. So these are all from a particular PDF file. If I select these that are missing and say click on the "Link Drawing To..." what will happen is it will point them all to the same page in the PDF file, which would not be appropriate. So I'm going to select at least one more that is not part of the same set. Then this button up here changes from "Link To" to "Read From". [0:08:30]

I don't have to worry about the fact that this is an elevation and these are PDFs. It will allow me to select the folder where I can find things, and only things that match will update. So I will say "Reads From", and I will locate where the MasterTemplate is located on the hard drive. Go into that folder and go into



the Linked Files folder, and you can see the "MasterSpecifications.pdf". I can't select it, because right now I'm selecting a folder and I will say Choose. And you can see that it made all of these say OK, and didn't affect the north elevation. So basically, you need to select all of them. If you're on a version of MasterTemplate before version 15 then there will be a much longer list, because each column was a separate page of the original word processing sheet. [0:09:27]

I don't want to get into this much further, but I will show you that if I look at this sheet, if I double click on this particular drawing and move this away, you can see that in the background this is an entire drawing that covers most of the sheet. If I zoom in on it, you'll see that there is some text here with information about how to use the specifications. Then there are placeholders for each column. So in this session here, I don't want to focus too much on the specifications, but that is something that I will have a separate video or part of another live training session to go over because it's a very powerful and convenient feature of MasterTemplate. [0:10:29]

Getting back to the training, I've opened up the template. Let me go back to the floor plan or any of the plan views and go to the File, External Content, Hotlink Manager where I have cleaned up links, and then Drawing Manager where I have cleaned up links for the logo and the specifications. Having done that, this is now going to be relatively clean, there aren't going to be any error messages. And I can go ahead and save this as a custom version of the template. So I am going to go and put it into my documents folder. I have "BCG" which is my company initials, Bobrow Consulting Group. [0:11:12]

Let me create a new folder for "ArchiCAD Reference Materials". You can name this whatever you like. This is a place where I am going to put the template that I am going to be using all the time for my design work if I was a design firm. I will create the folder and say that I would like to save the template as a Project Template. It changes the ending to .tpl. I will name this "BCG MasterTemplate 15". So something like this would be appropriate. It identifies it as your own company or personal version. You can keep the word MasterTemplate in it if you wish or take it away. But it should be clear by looking at the file name what this is. And this is in fact a template for ArchiCAD use. [0:12:19]

So I am going to save this. At this point, I have now created a customized version of MasterTemplate for my office, but I haven't actually done anything more than just cleaning up some of the links. I'm going to go to the title block. This is the first customization. And I do have a video on this on the MasterTemplate website, so I'll go through it quickly. Let me show you where those are. Go to the MasterTemplate website, and login. If you forget your login, go to [actemplate.com/login](http://actemplate.com/login). When I do that, it will say that I am already logged in, so it will take me to the home page. On the homepage here, we have the option of downloading all of the versions of MasterTemplate listed that you have access to. [0:13:28]

Then we have the trainings that I developed recently on using MasterTemplate, and the earlier ones that are video tutorials. So the one here that says, "Setting up Your Company Logo on the Title Block Masters" is what I am going to a short version of right now. So let me go now and go back to the template itself,



and let's take a look. If I go to any one of the sheets right now, say the Title sheet, it's set up to start work, but the company information is not usable. It won't have your company information. So this is in red; what that means is that it is part of the master, so I need to go to the master. I will open the masters at the bottom of the layout book. The first master here is the default in this version of the template. You will always see one of the masters have a turned-over corner on its icon indicating that it's the default. [0:14:49]

The most important thing to know is whatever size of sheet you are going to work with, and of course you can have more than one size of sheet for different projects, that you will need to update the logo for each of them. And you might as well do it in your standard template and get it done with so that when you start any project you can use whatever size sheet you want. If I double click on this, you will see that I am now looking at the sheet itself, and I have the logo here. When I select it, it's a graphic. In earlier versions of the template, this was a pasted in graphic. So the way to replace it was essentially to delete it and replace it with something else. And you can still do that; delete it, and bring in another graphic. [0:15:37]

Or you could just use the normal text tools to create company information. Now if I want to instead update it, say that this logo was going to be something else, then I could right click on this and say "Link Drawing To". This will allow me to go and get an external source drawing, and I can browse for this. Now here is the company logo that has already been supplied, but let's assume that you have another one available. You would want to make it the same size. Notice this is 1950x750, that's in pixels. So the simplest thing would be to create another similar type of JPEG with the same number of pixels. And then you can just replace it, and it comes in nicely. This is just standard ArchiCAD operation of linking a graphic to a different file or deleting it and placing another graphic. [0:16:44]

So you would do this here, and let's say that this was - let me demonstrate. I am going to shrink it. I have it selected, and I press down on a corner and I am using the option to shrink it. So this is giving you an idea that this was a different logo or different information. One thing you can do is copy this and then go to another sheet. And you can see here is another sheet that has a variation. It's a sheet with multiple columns for notes. I am going to get rid of this logo here and paste with Command+D or Ctrl+D. And you can see it drops right in. the sheet is the same size. I can go to each one of these, select it, delete, and paste. And every time I do that, it comes in nicely at the same orientation. [0:17:41]

If I have a different sized sheet, I could delete this. When I paste, it says, "Do you want to paste it in its original location, or the center of the current view?" I will say original location, and as I zoom out, you see that it came in on the smaller sheet here. So I would then just move this into position. In terms of your logo, it is expected that you would update all of the sheets that you are going to work with. I am going to widen the navigator a little bit, so we can read this better. I see a question from Buzz Bryan, "What if my company's title block is wider than yours on your four-column sheet?" [0:18:38]



With customization, feel free to modify the title block further than what I am doing. I will go back to the standard one here. You can change this or replace the entire title block with your own information. What will happen then is every sheet will update. I will show you a quick way that I can make this wider to simulate that. I'm going to use the marquee tool which allows me to delineate things. If I were to hit the delete key, anything that is partially enclosed would be deleted. But if I were to say Drag or Move, anything partially enclosed would move. [0:19:32]

But if I click on an element with the marquee still active and move to a new position using the Shift key to control that, and I type in 1" as the particular distance, I've now made the entire title block that much wider. About 2.5 cm wider. You'll notice that the vertical line moved and the horizontal line stretched. Things that were attached that happened to be caught up, like this block here, it moved. The other graphic was not included, so it did not move. But you can reconfigure this as you wish. This is a standard layout that is the default. [0:20:18]

So if I now go to one of my standard sheets, like this title sheet, it's now wider. What that means is I need to coordinate other things on that sheet. For example, here is a line, and I would want to stretch that back. Make whatever adjustments are needed. Feel free in your own copy of the template to move the title block information around however you see fit. There are some things in here that are auto text and you should at least be aware of them. Ideally, use them wherever you can so you don't lose information. For example, any text that you see in the master that has a # is a field reference. [0:21:22]

It's going to have the number and layout name change from one sheet to another. This text here says 12/20/11. Here in the United States, that means December 20th of 2011. I double click on it to edit it, and you can see that this text says it's putting in the short date. So it's always going to be the date you are looking at it. And that means when you are printing or plotting it, it will have the current date. You could put manual dates in and there are going to be some things like sheet or job. These are plain text. But the things you want to make sure of when you are bringing in your own title block, if you are replacing the one in MasterTemplate, is that you use as many of these auto text fields as you can. [0:22:21]

I've seen people put in static text and miss some of the opportunities. So what else can you have in here? There's project name, client information - and this client information, if I double click in the middle of it to edit it - what's going on? This is one text block that is, if I highlight it and click; it is the client information from the project info. This is one multi-line text box that is typed into project info. There are times when we would have a series of individual fields with spaces, commas, and line breaks. But in this case, it's the information under File menu, Info, Project Info. [0:23:20]

So we've covered this is in one of the earlier trainings. Basically, there is client information, and I want to edit it or when you have a project running, you're going to want to type in some useful information here and that will show up. As a little side note in terms of project info, obviously template for the most part





you're going to have generic names and then fill them in for the client and the project at each time you need it. But you should probably, if for example the place that's for the designer or the architect, if you are a one-person office and that is always you, you might as well put in your name there rather than every time you work on a project having to replace it. [0:24:10]

So anything you know is going to be constant you might as well put that in. Your company information can be put in here. Feel free to put in things like your consultant's name, if you use the same electrical engineer or civil engineer regularly. Then whenever you start a project it will just be there. If you need to update it, if it's no longer this person's name, then you can put in a different one. So in the project info in your basic template, put in whatever information you think would be constant such as your phone number and fax. [0:25:00]

In terms of title block, you want to use as many smart things as you can. You will see the usual graphic cue that we use, the grey background. This is intended as a reminder that you need to fill in information; it has not been touched yet. Once you put in the disclaimer information that may be typical on this, then you can change the background and remove the fill by turning it off. You can see how when I click this it turned it on or off. So that's the basic thing of the title block. Make sure you go through all of the sheet sizes that you use. [0:25:55]

Feel free to delete things that you don't use. However, it would be better to leave things if you have any doubt at all and ignore them. Who knows? At some point you may need a letter size piece of paper to work with and put notes on. Then you will have these sizes of sheets to work with. So that is the basics of working with and customizing the layout book. Now I have made some changes, however, they are not particularly good examples. So I'm going to go to File, Save. Now remember, when I hit save here, it's going to save the actual template that I've created. If I go back to any of the plan views, you'll see that we are in "BCG MasterTemplate 15". [0:26:58]

So I am now doing some customization and updating the template itself. So the next time I start a project, if I go to File, New, and I say I want to use a particular template so I say, "Browse for Template". And I go find this - I guess this is in here. Project Template, ArchiCAD Reference Materials. So here it is. If I select this and say I want to create a new project based on that, it will have all the information that I've customized. Let me cancel this, because I want to continue with some more customization. So let's look at some other things that are very simple to customize. Then we will get into some things that are more complicated. [0:27:53]

Let's take a look at the schedules, because I think that's probably something that people will regularly make changes on. Let's look at a simple schedule here. I'll take door types, and you can see that right now there are no doors, so it's a little hard to see what this looks like. Basically if we wanted to make a change - let me make a simple change - I will change the front elevation here. And I will write a custom note. Here is a change that I've made in this schedule definition. So when it goes onto a sheet, this is



now what it's going to have. Do anything you like here. If I go into something like the window schedule, this is a more complicated one. [0:29:00]

In today's session I'm not going to show you how to edit schedules particularly but still free to go and say, "Well, in this window schedule, I really want to have more information." So I will go into the scheme settings for it and put in another field. So right now the window schedule would show one window or does not have a place for quantities, so we're not grouping them. But sometimes you may want to have the quantity. Let me just open that up here and drag quantity over and put it right at the top of the list here. And I'll say OK, and you can see now quantity is there. And I can perhaps say #, like that. So now the window schedule would have that change. So you can change, add fields, take them away. [0:30:00]

Customize your schedule as you wish. The next time I save the template, it will have that for all future projects. As you work on projects you might make changes and decide that you like something else; maybe in a particular project you have a schedule that works differently. Let me show you how we might work with this. I will switch to the sample project and go to a schedule. Let me take the one for the room finished schedule as an example. Here is the room finished schedule. I will close the formatting of it. Let's say that this was an improved version in an active project. We want to get it into the template. So if you are working on a project and you have made some innovations, improvements or modifications, sometimes you can copy and paste things and sometimes you need to export and import. [0:31:16]

In the case of schedules, I am going to go to the scheme settings for the particular one that I like and I will call this "Room Finished Schedule 2". I am going to export it. So the export button allows me to save this out. You will notice that it has the ending ".xml". That is a particular form of a text document that is structured information. And it has the name. I can edit that. I can put it into this reference materials folder or wherever. This is certainly a reasonable place to save it because it's something that I am going to refer to and bring into the template. Potentially I could bring it into another project as well. So I will save it. Notice it says "Interactive Scheduling, Schedule Setting Files". [0:32:09]

I will say Save and OK. Let me go back to the one that I am customizing, and if I open up any of the schedules and go to scheme settings, we'll see under schemes here that corresponding button to import. So there is a room finished schedule here, but I am going to import another one. I will click on the Import button and get that room finished schedule and say, "Open It". And you can see it now has shown up in the list as a new schedule. And if I say OK you can see it has now shown up in this list. So basically for schedules, and for certain other types of information, you can export a new type of schedule or a revised type of schedule using the export button, and then import it into another project. Or in this case, the template. Any changes I make to the template, when I start a new project following that, would inherit that. So new projects following this point would have the new version of the room finished schedule. [0:33:25]



So schedules are pretty easy that way, but schedules do appear on a sheet. So let me go to a sheet in the layout book. So where would this be? This would probably be on interior elevations. We don't have that there, so let me go to the section. Instead of on the small building set, we'll go to the one for the A-6 of the hierarchically organized one. We'll see "finished plan and schedule". So of course there's nothing much here because this is just a template and there's no real building. But if we look at the information, here is the room finished schedule. So if I click on this room finished schedule and say "Link Drawing To", it will say that it's currently linked to an internal view. [0:34:29]

If I scroll down we should see it highlighted. It's not an index, we have to scroll way down. Schedules, there it is. You can see that it's highlighted. So basically this is what it's linked to, and if I wanted to make it quick and say I would like to use the new version of it then I would highlight this other one. I haven't made any changes to this so we won't see any difference, but basically I can say I would like to link it and we will see it blinked a little bit, so it was updating. If you update any schedules and leave it with the same name, and simply updated it within the template you won't have to do this. But if you brought in a new schedule and you want to replace existing references then this is how you would do it. [0:35:28]

Now let's look at the layout sheet numbering. So if I go here in our small project set, we are in our template, and let's say that you realize that you only need two pages of general notes. So I am going to highlight this sheet and delete it. So this is my template. Right now if I double click on this to look at the sheet, this is just a placeholder, there are no actual notes. Normally you would have notes on here that would be imported from the PDF. But let's say I didn't need this sheet, I only needed two of them. So I can just delete. And it says I can't undo it, but that's fine. I can always recreate it. And you can see now that the sheets have renumbered as ArchiCAD will always do. And we only have these two. [0:36:29]

In the same way, if I wanted to create a new layout, I can right click in here and say "New Layout". I will leave it with a generic name. You can feel free in your template to add or take away layouts. Of course, if you are taking away a layout that has some drawings placed on it, you will want to decide if the drawings should go on another sheet or do they not need to be there. If you don't use a room finished plan, you use a different way of communicating that information, then feel free to delete or add layouts as you need. You can add as many of these as you like, reorganize them. What if you wanted to change the numbering? In the case of the small project set, it has its own independent system. You can highlight the subset, click on settings, and change this. [0:37:23]

Perhaps we want to have "A-" instead of "A." and say OK. And you can see it has now changed that. This is all basic ArchiCAD stuff, but I want to assure you that within the template, but you can feel free to make these types of modifications to your numbering. Move layouts around and change their names, etc. Or move drawings from one sheet to another. If I look at the floor plans, you know that although you like having a simple sequence like this as opposed to the hierarchy, but you need two sheets for the floor plans because your buildings are larger and both stories won't fit on the same sheet, then feel free in your template to create a new layout below. [0:38:20]





Let me create a new blank layout and start over. We'll call this "Floor Plans" and you can see how there are now two of them. I can grab this second or upper floor drawing and place it on there and now I have the lower story here and the upper story there. You will notice that on this floor plan I have the floor plan keynotes. When I double click on it, it highlights it. So this is intended as a place for putting in certain notes that can be controlled in two different ways. I think I've talked about this in a previous training, but let me quickly go over it. [0:39:15]

There are two versions of the keynotes here, and these are both legitimate ways to work with it. This particular note is just text. If I double click on it, I can edit it directly. The reason why it has a grey background is because it has placeholder text, it's not real stuff. This is to alert you visually that you have not put in anything yet. In your template, you could leave this undisturbed so that when you start or work on a project, you know that you need to put in your keynotes. If it's grey, that means that you have not done it yet. But you could in the template put in some of the standard keynotes that you prefer and every time you start a project, those will already be there. [0:40:05]

This is one way of doing it. If you have multiple stories with multiple sheets, you could take this information and copy and paste it onto other sheets. On the other hand, this one is a worksheet. It doesn't look much different, but if I double click on it, I won't be able to select the text. I can right click on it and say "Open Source View", because this has a view that it comes from. And when I open source view, we can see that it now says "KN-01" which is keynotes, and the first one, 01. And now I can go in and edit it. And let's say 1.02 and say, "Additional notes go here." Alright, so I have now put in some more stuff here. And when I go back to that sheet, we're going to see as soon as I click the update button, this green button on the right, that the additional notes have been added. [0:41:16]

That wasn't any faster than just going and double clicking and putting in text, but if these floor plan keynotes are going to be seen on multiple sheets, then this is going to be a time saver. So basically what we want to do here is take the floor plan keynotes and drag it onto the other sheet and hold down or press and release the Option key. When I do that - or if I hold down the Option key in this case, it gives me a +. I think on Windows that would be the Ctrl key. When I have the + and I let go, you can see there's two copies of this. When I zoom out and go to the other sheet, you can see that the keynotes are on both of them. The advantage is - and I'm flipping between stories just to show you - if you had to two, three, or ten stories or more, you can put your keynotes that are typical on the floor plan views (as opposed the ceiling plan) and you can create them in a worksheet. And when you update the worksheet it will update on all of the stories or sheets that have that. [0:42:38]

So that's the reason why you might use a worksheet for keynotes as opposed to text in this case. If you're doing a very complex project, or if you prefer to put in a lot of keynotes and use even better tools, you might consider Cadimage. They make great add-ons for ArchiCAD and one of them is called "Keynotes". It automatically tabulates notes that have been placed into any view and will also tabulate



the notes that are used in multiple views. So it will give you an automatic listing of those notes. It can be very powerful. [0:43:20]

So we can change the style and sequence of the pages, and move the drawings around. Whatever you do in the template is what you will start out with when you start a new project. Now let's look at the sequence below for the hierarchical ones, the A.100, A.200 series, etc. Again, any of these things can be changed. I highlight this and say, "Site Items and Plans". I can just type that in and now that text changes. I can also change its settings so that it uses a dot or a dash. Change any format that you want. Whatever you do here, is perfectly fine to customize. So in general, stuff that you do in the layout book here you can do in a project or in a template itself. [0:44:21]

If you would not ever use say, "PDF Forms Auto Fillout", feel free to drag this to the trash. It will be out of your way. So anything that you put in this subset for trash will disappear from view. I think it's worth knowing about, so I am going to put that back in the place that it was. What are these PDF forms? This is an idea that you don't have to use, but here is a Building Department Application. If I double click on it, you can see that it's not a full size sheet, it's a small letter size sheet. And when I zoom in it says "Insert PDF forms here, and insert auto text fields over the 2D filled-in blank lines." So let me zoom in a little bit. Basically, if you have a building department in your vicinity that you are submitting to regularly, feel free to put in their PDF form on a sheet or multiple forms into this folder. [0:45:35]

Then you can fill the information in for your submission right within your project file. So instead of doing it in a word processor, you may find it easier to fill in this information directly within ArchiCAD. I have one of my clients, Beverly Kendall, who says that she has created not only these submissions as PDFs, but within her documents, she has marketing materials. She has brochures and all sorts of stuff within ArchiCAD. Of course, some if it may be PDF or have graphics as part of it, but she is laying out on the layout sheet things that are not part of the construction documents, but are used for other parts of her office. So you may want to consider that in the template or just in general using ArchiCAD. [0:46:28]

So in terms of the layout book, feel free to do that. So we have looked at two areas that are very simple, and you can modify schedules and you can add to them. You can modify or add to the layout book here and that can be saved into the template. Now let's look at some more complicated things. So we are going to switch to composites and layers and materials and things like that. In the template, we are generally not going to be drawing any sort of building elements directly. Not to say that you can't, but it wouldn't be common. Let me go to a plan view here. Let me go to a wall. I am selecting a very simple one. We have within the options for composites; we have certain ones that are built in the template. As I scroll through this list, very long list of things, one of the things that you will want to look at in the template is what are your wall types? [0:47:48]

So here we have in the U.S. residential construction a 2x6 with 5/8" gypsum board. So this is a particular wall type that is available. And if I zoom in on it, you can see the framing space and the sheathing on



both sides. Suppose there was a different variation of this that you used, and you want to create that and have it available in the template. So let me go and modify or duplicate this and make a change. So I will use the eyedropper to pick up the settings of this one. The wall tool is set to draw more of the walls just like it, but what I care about in this case is when I go to the Options, Element Attributes, or Composites, it is going to show me that particular composite ready to edit or duplicate. So you can see the one that I just created is now ready for editing or duplication. So let me duplicate this. [0:48:49]

Perhaps in some cases we might want to make this thicker. I am just going to make it 1" thick. So it's going to be quite a bit thicker sheathing, maybe for fire safety. But the idea here is that this is a different wall composition than we have in this template. I am going to say OK. And just by naming it, it shows up in the list. And you can see in the list, here is the new one I created and here are the ones below it that are similar. The actual composite has not changed. So I need to highlight the particular skin, the gypsum board, and change it to a different thickness. It now gets thicker. I will select this one up above and highlight the one down below. [0:49:40]

And by the way, you can click these on the side or click on them in the left side here. And I will go ahead and make this one thicker as well. So this is now a new composite, and I say OK. I have defined a new composite. If I went to the wall tool and selected this, we will see now that the - where was it - walls, down here, here is the new one that I created. So this is now available in the template, and of course in any new projects that we might create from the template. And if I draw this wall, we are going to see that it's subtly different, a little bit thicker in terms of the sheathing. [0:50:35]

So you can add other attributes into the template. Composites or wall assemblies would be common ones. You can also add new fills or materials. So let's go to materials, and I can go and say for example, let's pick a common paint color, paint 11. So here is a particular color. Let's say that I duplicate this, and we're going to call it "Paint ABC". So I am now creating a material that has a name that I could be reusing. Maybe there are some standard paints or other materials that you use frequently that you want to put in here. You can modify the color. I will just make this a rather different tone, so it's pinker. [0:51:35]

That material is in the template. So those sorts of things, feel free to customize absolutely anything you want to do. So that would include adding composites or materials or fills or line types. They become resources. What happens if you modify a definition? Let's go to the materials and again pick one. So here is "Paint 11". So if "Paint 11" or any other material in here, you say, "I don't like that one," or, "I have a better version of it," and it could be something more specific like the Spanish tile here, here is a version of it and we want to create a revised one. If I modify this, then of course all projects created after this template is saved will have this new version, but existing projects won't have it. [0:52:35]

So one question would be how do you bring in materials from one project to another? To put it in a more common context, in an active project, you are likely going to at times create new materials. And you



might want to add those materials into the template. So how would you do that? I see a question and I am going to digress back. The question is from Ken Filarski, "If a page sheet is not used in a project, does it have to be placed in the trash so it does not print out when publishing the drawing?" That is a good question. And thank you Ken. [0:53:25]

So we'll just back up a second to the sheet. When I am working on exporting from this publishing, I can go in and have any sheet open. I can print or plot this. Right now I don't have a plotter set up - let me actually just go to the plot command instead. And I will say "Plot". I can say either the active layout, which is the one I am in, or I can say "Selected Layout". That will allow me to manually go and Shift+click and select several of these, or hold down the Command or Ctrl Key and click additional ones. So now these are available for plotting, and we can say the selected ones. So here, we would do the four that I've highlighted. [0:54:23]

Now you don't have to - if you are using those options - worry about putting something out of the way that you don't want to print because you are manually choosing. But if you use the publisher - and the publisher, I don't want to get into a whole training on publisher right now - it can have different things in it. You can say I want to export .dwg files, or print or plot sets. So here is a PDF. There are a bunch of these. Again, if I Ctrl or Command+click, I can say that I would like to publish selected items. You can see this option here, and you can control it that way. [0:55:11]

The publisher is independent of the layout book. What you see here it Title sheet, General Notes, 1, 2, and here is Layout. This is Title sheet, General Notes, and because I deleted the other one, it disappeared. So it doesn't have the one that I created called "Layout". And in fact, if I didn't want to have the general notes in this output, I can select these and remove them from the publisher. This tells me that it's not undoable, it just means that I can't undo the deletion, but I can add it back in again. But I say delete it. This did not delete the sheet from the layout book. You can see the general notes are still here. It's just that for this particular set, I don't want that. [0:56:08]

So basically what you can do is have in your publisher you can control which things you want to export. There is no particular reason to hide or delete sheets just because you don't want to print them regularly, like the ones down below that I set for the PDF forms fillout. You just don't include them in your selected output. The one place where you may get tripped up that is a little more complicated, and I already discussed this in an earlier training, has to do with the index. If I look at this small project set, you can see the index has updated automatically to have the two sheets of general notes and the new sheet that I just added in called "Layout". [0:56:58]

So it's showing the latest version of this, and it's showing the entire content of the subset that is called "Small Project Set". So this particular index, if I right click on it and open the source view, which is what defines what is going to be in that index, it's going to have a setting. And that setting has a criteria. And the criteria in this case will only list the sheets that are in this particular subset. It does show small



project set when I use the little triangle, but for some reason it's highlighting the wrong one. But it is doing the small project set here as opposed to any other ones. If I select a different one, it modifies that. Let me cancel it. So this particular one is what is giving this information here. But let's look at the one in the larger set. Let me go to Title Sheet. You can see that this is, when I bring it down and zoom in on it, giving me the numbers A.101, A.201. etc. [0:58:23]

If I open the source view for this index and look at the settings, all of these series settings here say that they're going to list things that are in particular subsets. In this case, it's listing all of the sheets in the first eight subsets. It's not looking or listing the ones that are in, for example, subset 9 - presentations or subset 10 - letter sized documents. So the index can control which ones are going to be listed, and when you print or plot you can select which ones you want to print or plot. When you create a publisher set, you can control which ones you want to output. [0:59:09]

So that was perhaps a lengthier explanation than I intended, but hopefully this is a good training and overview of ArchiCAD's structure in this way. So we've looked at customization of the layout book and schedules, and we've been talking about creating new composites, materials and other attributes. Now I was starting to say, what happens when we have new materials that we have created in another project? So let me go to the sample project and we'll go to a plan view. This wall type is a sample stone base wall. Let me refresh everyone's memory by showing just what I have selected in 3D. We are going to see that the wall is a rather interesting shape. [1:00:43]

Each one of these elements is a single wall with stone at the bottom and different shapes. Let me go to the Design, Complex Profiles and let's look at that and maybe make a variation of it. So I will go to the one that is called "Sample Stone Base Wall". I will say, "Edit the Chosen Profile". Say we wanted to have a different version of it. I will view this with hairline, not true line weight. And I will select this, and let's just make this have a curved, bull nose sort of shape, just to make this noticeably different. I am going to take this point and take it up. So this is very similar, but a noticeably different shape. [1:01:48]

So I could click "Store Profile" and that would update it. But I can also duplicate what I have been working on and not store it. So I am not going to overwrite the version I have, but I am going to create a new version and store the custom one. And I will just do it with bull nose. So I now have just created a new wall type. And let me go back to here, and we will select these walls. And I will take one from around the corner as well and change the settings to use the bull nose version. And you can see how that has changed. Now if I undo this, you can see the change back to the square version, and if I redo, you can see the change here. [1:02:57]

So it's noticeably different. So let's say that was a wall type that we wanted to have in the template. The simplest way to do that, and this is true for any type of project, is to go to the floor plan. Let's select this wall - this is one of the new ones that has been changed. And I am going to copy it. Now I will go to the template here and paste. It will say, "Do you want to paste it in the original location?" I will say put it in





the current view here, that's fine. And now this element that I have just copied in, you will notice its name says "Structure Sample Stone Base Wall with Bull nose". So if I go to Design Menu, Complex Profiles, Profile Manager, we are going to see this profile is now in this project. So it came in by copying and pasting a wall that had that profile and added to the current attributes of the project. [1:04:19]

So you can bring in wall assemblies, normal vertical ones, and complex profiles. And even things that have different materials, you can copy and paste them in, and I can actually go ahead and delete this wall. I can delete all of these. And even though they are not visible, there's no wall there, it's still in the wall tool. We are going to see the new versions of those elements. So we have the new version of the exterior wall, and here is the new version of the thicker wall that I created. And if we changed the wall type to be a custom profile we would have that. [1:05:22]

So you can add these in. Now what happens if you modify? Let's say you have a better or preferred version. In the template, if you make a modification, the next project that you create will have the updated version of all of those things. So that's not an issue. Where we will start having some complications is if we change certain attributes that are referred to from the Interactive Legends. And this brings up the whole topic of how do you customize and add to your Interactive Legends. So I am going to switch gears to talk about that. Let's look at the Interactive Legends and the way we normally use it in the template. So if I double click on interactive legend worksheet, we are now looking at the legends. [1:06:19]

I can zoom in on the area with the wall types and eyedrop one of these. Then I can go back to my design area. Right now I am in the template itself, and any changes I make when I save it are going to be carried forward to future projects. But let's assume that I was in a copy of the template or a new project I was working on. If I just click, you can see the wall type that I have just started to put in was based on the template. Now when I go back to that template here we are seeing only the wall types that were supplied with MasterTemplate. So I have at least two new wall types that I created in the last few minutes. They are not in this interactive legend. [1:07:19]

So how would I make them easily accessible in a new project? Essentially you have two choices. You can either modify the stuff that is here, so that would mean the standard Interactive Legends that fill up the bulk of this screen right now, or you can go into the area over in this section that say, "Your Office Favorites Legends". So this is an area that has been set up with some placeholders that are intended for you to add your own things. So instead of you customizing the big legend and modifying it, I would suggest that you start out by looking at modifying, improving, or adding to the Office Favorites Legends. Let me show you how that works. [1:08:09]

The reason why this is better for certain modifications is that we periodically may update the Interactive Legends. When you go from one version of ArchiCAD to another, and update MasterTemplate, you can get our updated version of that. And you don't have to worry about it, it's all handled. And your office



favorites then become something relatively small, but you can modify it yourself. If you put it into the main legends, then updating from one version of ArchiCAD to another becomes a more serious issue because you have to either update the whole thing yourself or selectively update what we've got and bring in yours. And it becomes a management issue. [1:08:53]

So in terms of the hotlinks, if you go the File menu, External Content, Hotlink Manager, we'll see that the legends is the bulk of this, it's 95% of what we are looking at. But the office favorites is available in the project favorites. If I highlight office favorites and say, "Open in Separate ArchiCAD", it will bring up a copy of this file in another session of ArchiCAD. And you can see that ArchiCAD is starting up. And here is where I might add attributes such as the new walls that I've created. You can have them in the template in the list, so that you can always use the popup menu to select a different wall type. [1:09:49]

But if you want to be able to eyedrop, and of course the Interactive Legends are very convenient that way, then you may want to go and paste it. And we will say "Center of Current View". Here is that special wall. Now this wall, let's rotate it around. I will drag it into position and line it up so that it's nice and neat and shorten it and get rid of the window. I will stretch this back and line that up. And for convenience this I will drag and press down the Option key or Ctrl key to get a +, get a copy, and change this. I don't remember what I called this, but let's say this was "Stone base wall with bull nose". [1:11:04]

Now in the office favorites I have one more wall. And of course you can add many more walls. And you can add different assemblies, slabs or roofs and bring in objects. They may be custom objects or they might simply be objects that you use frequently that you want to have handy. They can be distinct from things we have in the legends now. There is no reason they couldn't also be the same. You are just putting in things that you like to use. The categories here, such as plumbing, mechanical, text and electrical are arbitrary. If you would prefer to have more space for plumbing stuff, then you can move this electrical one over here and get rid of this color and stretch this. [1:12:10]

So feel free to do whatever you want. You can fill this up with a bunch of things. So the customization I have done so far is I have brought in one new wall type, and I have reconfigured some things here partially. This can develop over time as you work on it. And it will be up to date in every project and in the template itself, because it's being referenced in. so let me make a change here. For my purposes, I want to keep the office favorites undisturbed because I do training with it and I don't want it to look different when I do the next training. But for yours, you may save and that would update it. For my training purposes, I am going to call it "AMasterTemplate Office Favorites 15 Custom". [1:13:23]

So I will create an extra file and change the name so that it's clear. But you may just want to overwrite the earlier version. Let me go back to the template itself, having added one wall type and reconfigured this a bit. You will see that this hasn't changed because I haven't updated it. And in this case, it won't be linked to the new copy of that. If I go back to the File, External Content, Hotlink Manager, and say you would like to relink the office favorites to the new copy. In your case, you might just update it. It might



say "Modified", and you can just say "Update". But I will relink it to this here, my custom version. So it has been relocated and it recognizes that it is the same file but it has a new name. [1:14:30]

It doesn't know how different it is, but when I say OK it will bring it up to date. So we are seeing that it's doing some loading and updating and now we can see that in this reference I now have the update. So that's the basic approach to updating the Interactive Legends is that you can open the Office Favorites Legends and add and reconfigure things as desired. And then whenever you use the legends you can eyedrop from that. We have a section here for components and lower down we have a section for room assemblies. So if you recall in the standard Interactive Legends, we have some room assemblies. If we zoom in, here is a conference room or an office. Then we have some residential ones as well. [1:15:33]

Let me switch to the Office Favorites file again. If I fit in window you will see it has a place for Quick Rooms and you can put in Room Assembly. So what we would envision you using this for is taking a room that you have done or a furniture layout or any type of group of elements from a project and copy and paste it in here. Then move it around or clean it up until it's good for generic use. We decided on the module size of this particular group to be a more common resolution. This is a size where you can see the elements and read the text nicely. So that is why we settled on this particular size for a module grouping. [1:16:46]

But there's nothing that says you can't modify this. For example, take this module size and stretch this out and make it bigger. There are some things like this graphic, a little shadow here, that isn't quite working. So there are some complications that you could live with, it's hardly noticeable. Or you could clean that up if you wish. Feel free to modify it, or add some things off to the side. When I go to the Legends here, although this is neatly arranged, you could have some things going off to the side. You could expand this as much as you needed. And one option I have never done is this group of elements that are in the center of my screen that come from the office favorites, while we could put things in here and possibly expand to the side, you could put things in here that are off to the left. And they would overlay on top of the existing legends. [1:18:06]

Now why would you do that? Well, maybe you want to have these walls that we're going to be eyedropping over where the other walls are. So if I go in here, there are some simple walls down below. And this one is for a simple model where we are not getting into detail yet. And of course we have the other ones that are much more complex. You could potentially put some other ones in this area. There is not a lot of empty space, but you could put some things there. So that is an option. So that is the basics of customizing the office favorites. If you wanted to do something in a project, you can see there is another set of favorites here or another area called Project Favorites. I think this is infrequently used. [1:19:05]

If you had a large project, and you wanted to set up some standards that would be used in different parts of the project, feel free to develop this further and put things in. they have some generic names,



walls, curtain walls, slabs, beams, footings, plumbing and mechanical. And you could fill those in. So this would allow you, as you or teammates work on different parts of the project, to eyedrop standard wall assemblies or other components that are in use in this project. If I go to External Content, Hotlink Manager, this one is the Project Favorites. [1:19:51]

Initially it's set up to be this file here in the MasterTemplate Linked Files. But what's envisioned for its usage is that in a large project, you might create a copy of this "AMasterTemplate Project Favorites.pln" file. Put that into the project folder, and then rename it as "ABC Hospital Favorites" or "XYZ Corporation Headquarters Favorites". And then instead of within the same folder like I did here, you would relink this particular project favorites to the new one that you created that was for that particular project. Having done that, you could update this whenever you like and add to it. So Project Favorites would be a variation and mainly useful for larger projects that are going to go on for a longer period of time and will give you more customization options. [1:21:08]

So that is a bit about customizing the interactive legend. Let's look at some things to be careful of if you customize and make sure you don't get tripped up. I am going to do one more very common thing which is to change scales. So I'm looking at the ground floor plan. I will get rid of these elements here. This is set at a certain scale; 1/4" scale which is roughly 1:50. And we do have a variation for the smaller scale already setup. So some projects would want to use both the smaller and enlarged scale. Suppose this was a huge project and you wanted it to be half that size. Say the standard floor plan was 1/8 and the reduced size was 1/16. I could go in and highlight this particular folder and change the settings through the properties. [1:22:49]

The meeting sent to the smaller scale and say OK. Now when I double click on the first floor plan, you can see that it's set at 1/8". So by changing the settings for the clone folder, it changed the settings for this. I probably want to go in here and change its name, and then change this one, which is normally a smaller scale one, and change that again. So this would be going from 1:100 to 1:200 in metric. And I might change the name. So basically, feel free to change these clone folders settings that will affect all the elements within. Here I have actually changed two sets of plans. If the reflected ceiling plan or in fact all of the construction documents are also going to be at the same scale, I can highlight multiple clone folders, click on settings, and change them all to that scale. [1:24:07]

If it says "Various" here, then I would want to be careful, because that's going to overwrite all of them. For example, this one that I just took out of the group was already at a smaller scale because it was for calculation purposes. These other ones were probably all originally at 1/4 inch or 1:50. And if I go to the settings, you can see it change them all. They were all at the quarter inch. Let me change them all to this and say OK. So now, all of those have changed. So feel free to do that. It will affect all of the ones inside. Now let's look at something like a room finished plan. So if I go to the room finished plans in the sample project, this will give us some context. This is intended to show the basic building partitions and the information about the materials that are used as finishes. [1:25:21]



It also has the interior elevation markers indicated. Let's say we wanted to have the room finished plans without these interior elevation markers. If I go to the Layer Dialog box, this room finished plan has turned on the "A.MarkerInteriorElevationsCon.doc". I could easily hide this and lock it and update. And what that has done is whenever we have the room finished in whatever story - if I go to the upper story - we will see the same thing has happened. On each of these, and now the interior elevation markers are not showing. So I have made a change by redefining the layer combination and of course the views will update. Let me go back and turn that back on and try something else. [1:26:24]

Let's go to the room finished here and go to the markers and turn that back on. So now these are correctly showing. Suppose I decided I wanted to change the name of something. This is important to recognize that changing the name of certain things does not have any problem and changing the names of other things will cause some issues. For example, if I go to the Layer Dialog box and let's change the name of the interior elevation marker. Let me just delete this here where it says "con.doc". I will change it to "Interior Elev". When I change the name, nothing changed onscreen. But if I select this particular marker, we are going to see that the name is changed, it says "Interior Elev" instead of "interior elevation con.doc". That's not a problem. Changing the layer name does not cause a problem. [1:27:40]

Changing the names of any of the standard attributes, such as the material name, fill type or a composite for a wall assembly or similar, will not cause problems. However, if I were to change the name of this "Room Finish" layer combination, changing it to "Room Finishes" I have added the two letters on the end, and say OK, what's going to happen is if we look at the properties for these views and I open up the settings, it's going to say that the layer combination is missing. It says I can't find the layer combination that used to have this name. So I could go in here and manually change it to "Room Finishes". That has been fixed, but the upper story has the same issue where it's missing. So I would want to change it for the clone folder itself. [1:28:55]

Manually update from the old name to the new name. If you change the name of a layer combination, you will have to go to all views or all clone folders that create views and update that, because otherwise you will have some things that will say they are missing. And if it's missing it means that you have lost control. If you update the layer combination to the new version of the room finishes, the views won't change. So you can get inconsistencies there. So that is changing a layer combination name. In a similar way, we go to the Documents, Model View. You can see here we have "Model View Room Finish Plan". And the clone folder refers to it. If I were to change the name of that plan here, and put an "S" at the end, we'll now see that this "Room Finish Plans" settings shows that "Model View Options" is missing, it can't find that. [1:30:23]

So you have to be careful when changing model view options or layer combinations because views will have missing information and you can have some issues. That is important in any project, not just in the template. This affects layer combinations and model view options primarily, but probably it also affects dimensions, the styles of the dimensions that you are using in a particular view. If you were to change





the name of a dimension, then it would be missing. And it probably affects the other ones in this style, such as the renovation filters in ArchiCAD 15 and pen sets. So be on the lookout for anything in this view settings window for changing the names of them, because you'll have to be careful and go to the views that refer to what was formally one name and manually update it to another one. [1:31:28]

That is my main caution there; watch out for changing names of those things. So you can change the ones that are in element attributes in almost all cases. But you cannot change the ones that are under the view settings. Now it has been an hour and a half, so we are reaching a point where we probably want to finish up. I'm trying to think of what other common customizations people have requested. I think this covers most of the issues. I will just mention that if you are adding or changing names of attributes in the Interactive Legends, there are some things you have to coordinate very carefully. [1:32:29]

Let me go and tab over to the template. If I were to change the name of this layer, "A.Wall Interior" and add an "s" or any other change, this will be fine within this particular project. But what will happen is the elements that are in the Interactive Legend - so if we go to the Interactive Legend worksheets, and go to the walls, there are elements that are interior walls. If I eyedrop this, you can see it says "A.Wall Interior 3D". This has certain layers. So if I change the layer name, the name of the composite, or anything that is shared between the Interactive Legends and the template, you have to be very careful to coordinate and make the same name change in both places. Otherwise what would happen is I would have a layer with "Interiors" with an "s" here, a layer with "Interior" without the "s" in the Interactive Legends. [1:34:06]

And when that legend is updated, or the next time the file is opened, we would have two different layers with slightly different names. And that can get very messy, particularly if you have renamed a number of layers. All the sudden you'll find that you have duplicates of all the ones that you renamed. Why? Because the Interactive Legends have their own layer setup, and if you didn't coordinate it, you could easily have that happen. So without getting into total detail on it, I have written up some notes on this and can post on the MasterTemplate website. We would want to use the Options, Element Attributes, Attribute Manager. In the Attribute Manager for any particular group such as Layers or Materials, if you are renaming things, we'd want to first rename them in one of the files and then copy them into the other. [1:35:05]

So you could rename them in the actual template and then open up the Legends here and copy and paste these back and forth. You will want to use this to make sure they coordinate if you are doing some larger customization wholesale changes on that. So I think I will finish up. There are some more things that warrant explanation for the template, but I will reserve my decision in terms of whether there will be another training like this at another date. If you have some questions that were not covered adequately in the manual, I'd like your feedback. If you have questions right now I could take a few more minutes if you would like me to explain something. [1:36:13]



**Master Template**™  
The Office Standard for ArchiCAD®  
[www.actemplate.com](http://www.actemplate.com)

# Training Lesson

## TRANSCRIPT

So I want to thank you for your time and the opportunity to work with you on the template. I will be posting this recording in the member area, so if you need to go or have had enough for today, come back and review the recording if you wish. If you have any questions, type them in. or if you want to make any comments, I am always happy to get those in the comments box or in an email, or you can post them on the page below the video. [Pause] I see one thank you from Chris Sparks. And another thank you from Marik Stoklosa. Merry Christmas to you and Happy New Year to everyone. Thank you Dave Olafs and Ken Filarski. So you are all very welcome, and I look forward to talking to you again soon. Many of you are in the Best Practices Course, and are used to coaching calls. If you are not in the course, you may want to consider that, because I do a lot of these trainings as part of the Best Practices course. And I look forward to your feedback and will continue to develop materials for MasterTemplate to try to make them ever more understandable and optimized for your use. So I bid you farewell and talk again soon.

[END OF AUDIO 1:38:04]