

5-3-The_Best_Practices_Course--Week_5—General_Notes--Part_3

Hello, this is Eric Bobrow, with the third and final section of week number five, where we've been looking at creating general notes and specifications in a word processor like Microsoft Word or Apple's Pages, creating a PDF, and placing that PDF to create the general notes pages in your Layout Book. [0:21]

Now, I'm going to go and set up in my template the set of boilerplate notes that we'll be using as we start a new project, and then updating as we work on the project. So let's take a look at that process. I'm going to go ahead and open the template, because I'd like to update it. If you say "Open", and you go find a TPL file like this one here, you're going to be able to edit it as opposed to when you say "New File" and then you either browse for or select from a list of templates. [1:00]

Because when you create a new file based on a template, it will open the template, but then create an untitled new copy of it, whereas when I am doing this now, I am telling it to open that TPL file, and then at the point that it finishes reading it, it will still say the name of the template at the top. So it won't say, "Untitled", it will have the name. So right now, you can see it says "BCG MasterTemplate 14" at the top, and even after I finish opening it, it will still say that. [1:32]

So now I've got that file open, I'm going to skip the message about updating drawings, because that's something that you'll get every time you open a file. You can always say "Skip All" unless you're about to print a drawing set, because you can always update as you need to along the way. Now, I'm going to get rid of some things from my explanatory notes from MasterTemplate that I don't need. So I'll just get rid of this welcome message and all of the other things that are grouped with it. [2:07]

And so now this is a simpler environment to get started with. I'm going to go to the layout book, and go to the general notes here, and we'll see that the general notes right now in MasterTemplate, we provide a structure for this. But the actual notes that are on the page are just a guide for how you work with it. So this is page one, this is page two. You can see it says "Page Placeholder". So basically, we provide a blank Word file, but it's set up with multiple columns to be a framework for doing it. [2:50]

Now, I've created, in Word, a set of boilerplate notes, and these are set up in the approach where each page is a column. So this right now I highlighted some things in the first column and you'll see down below it says "Pages 1 of 15". If I highlight some things in the second column, it will say "Pages 2 of 15", and this is page three, etc. So each column is a page in this particular approach. [3:23]

And I've created a PDF file, which if I bring it up, you can see this is one page in the PDF, it's one column. So that file is located here in the finder, and I just did that this evening. And I'm going to go ahead and overwrite where I've got that stored currently in the template. I have the earlier version that I'd done a few months back, when we created the ArchiCAD 14 version of the template. I've got that here, and I'm going to overwrite this. So I'm going to drive this in on top of it, and I'll use the Option key to make a copy, because I'm going to leave a copy behind where my source was. [4:07]

But I'm now going to take that copy and overwrite, or replace, the PDF here. Now, having done that, if I go back to ArchiCAD, we don't see a change immediately, but if I go ahead and click on this column, which is a

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drawing, and tell it to update, then it's going to have an updated version. You can see how this now has the first page of the boilerplate notes rather than the original place holder. [4:38]

Now, if I click on the green button here, it will update all of the drawings on this page. And you can see that they have all now been filled in. And I could go, if I go to the next sheet, I could go and click the green button again, so that all of these place holders would be updated. But instead, just for demonstration, I'm going to open up the Drawing Manager here, from the project chooser, and in the Drawing Manager, I'll go and find where these PDFs are. [5:06]

And you can see there are a number of PDF files. This particular one is one of the ones that is on this page. I'll just go and and highlight all of them. I'll scroll down and highlight all of these PDFs here, and I'll just say, "Update". So now I'm using the green button in the Drawing Manager, and it's going to go, and within a few seconds, it will update the specifications on all of the sheets. So, I could leave this Drawing Manager open, but as soon as it finishes, I'll close it, and you'll see that the layout has updated, and when I go to the next page of course, it's also got the new notes. [5:45]

Now, before I actually go ahead and save this as my active template, I want to update the Title Block. So, I'm going to go down to the Masters, which is where we have all of the repeating content. This particular Master here, you can see it says, "MT Notes 5 Column". So I'll go up to the "MT Notes 5 Column" here, and here is the actual Layout Master. And I'll select this ArchiCAD MasterTemplate Logo, and replace it. [6:20]

I'll say "Link This Drawing To". So we can do this at any time. I can take any type of drawing and say, I'd like to relink it to something else. In this case an external source file. I'll browse and go find my new company logo. And you can see within a couple of seconds, I now have a new logo there. [6:41]

Now, there is another page, the "MT Standard". So this is one without the multiple columns for the notes, and I can go ahead and update that individually. Again, just say right click on this, and say, "Link Drawing To", and find that file and tell it to link. However, I do have a whole lot of layout sheets, so how would I do this all at once? Well, I can go again to the Drawing Manager. [7:14]

And we'll see that the current logo is this one. You can see it's a little bit bold, it's on the current sheet. But the earlier logos were called "AMT Layout Master Company Logo", and those ones there are linked to an older file. And what I'd like to do is link all of these. So I'll just say, click on the link icon, they all were linked to the same files, so I'll just say link them to a different file. And do this here, and all of them now will, within a few seconds, be updated. [7:48]

So here I want to make them all the same file, and if I go to any of the other sheets, perhaps a different size sheet, we'll see that it's now got the new logo. So I'll just close up the Masters, and you can see that now the general notes is on a sheet that has the new logo. So I'll close up the Layout sheet, and I'll be back at the front page here, and I'll just update my template. [8:20]

So now I'm going to create a new file based on this template. So, instead of using standard ArchiCAD 14 one, I'll use this "BCG MasterTemplate" here as the beginning, and say "New", and this will close the file I'm

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working on, and create a new file based on, in this case, the same template file. So again, I get the "Update Drawings?" warning, which I can skip, and I'm now in and untitled copy of the template, ready to work on a real project. So, how would we start the real project? I'm going to go now to the File menu and say "Save As", and make sure that it's saving as an ArchiCAD solo project. [9:12]

Be careful here, if you do "Save As", it will bring it up the last thing you were doing. So if you were saving DWG files or JPEGs or something like that, that will be the format that it's going to think that you want when you do a "Save As". So you need to make sure the you're saving a solo project. [9:29]

So, let me go and create this. Let's call this the "Reynold's Residence", and we'll go to My Documents folder, My Projects, and we'll create a folder here. Here's the "Reynolds Residence" folder, and I'll go head and save that. Okay, so we've now saved that. We're going to of course, in the course of doing the project, at some point be ready to work on the notes. So in other words, these general notes here that were boilerplate, we're going to need to make revisions, and we're going to start referring to the project. [10:12]

So how would we actually do that? I'm going to go back to Word here, and here I've got the notes that were being worked on, and let me just make something as a quick change here. I'll just zoom in a little bit. And let's say I'm going to add some spaces here in and I'll just put in - So I've just put in some new notes that would refer to the particular project. [10:55]

Of course this would go through all of the pages, everything that you need to do, but how would this work in terms of the workflow? Well, the "Master Specifications" document that I've got, what is ideal is we're going to do a "Save As", and save it into the "Reynold's Residence" folder. So when you go to the Documents folder here, to Projects, and "Reynolds Residence", and I'll go ahead and save it as a Word file, so it now has the same name, "Master_Specifications.docx, in this case. [11:32]

And let's just assume that I've done enough that I would like to get this updated in the project. I'll go and print it to PDF. This, on the Mac, is how you do it. You go to Print and then save as PDF, but on Windows, you might do different process. So here I am creating the PDF in the "Reynolds Residence" folder. And now let me go back to the project and of course, this area right here is where I'm going to see the change, the new text, and how things slide around, because I've inserted some text. [12:22]

Now, how would I update it? Well I could go to this one drawing here, and say that I'd like to link this one drawing to an external source. Go browse for the "Reynolds Residence" project here, and say I'd like to get the "Master Specifications" file, and in this case it's a page 1, and say "Place It", and you can see now that it's updated. But then I would have to do it for all of the columns that are separate pages. So let me propose a quicker, simpler way, which is to go into the Drawing Manager. And let's go find all of these specifications. [13:13]

So I'll highlight all of them. Now, if I highlight all of them that are from the same source, and I use the "Link Drawing To", they will all come to the new file that I'm pointing at, but they'll all be the same page. That's really not the ideal thing, because obviously each one of these is a separate column or page. Now, in this case

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because one of them is coming from a different source, it has changed the icon from the “Link To”, which is what it looks like here, you can see it says “Link Drawing To”, and as soon as I have a drawing that comes from a different source, it changes to “Read From”. [14:02]

Now, if I hadn't already done the one change where it was picking up the master specifications PDF from the new location, then this would all still still say “Link To”. But I can force it by simply including that one additional item, in this case an internal drawing, and then it will say “Read From”. This will always make it say “Read From”. So you'll want to pick all of the PDFs, plus one more, and then it will say “Read From”. Click on that, and then you tell it what folder. [14:36]

Now I'm already in the “Reynolds Residence” folder, so that actually won't work. What I need to do is highlight the “Reynolds Residence” folder and click the button that says “Choose”. And what that will do is it will actually look in there, and you see one of them is already okay, because I had just updated it. The other ones it says are modified here, and I can go ahead and say “Update These”. And so it is actually just going ahead and updating all of these. [15:03]

And you'll notice that the page numbers here, 2,3,4,5, etcetera, these all remained independent. So now, if I go back to the sheet and close up the Drawing Manager, we'll see of course that the sheet is updated. And these have all slid around a little bit, because I added those extra lines of text. [15:32]

So the basic idea here is when you start a new project, you can leave the general notes linked to the original template notes. But then at some point you're going to want to use the Drawing Manager and point them to a new set of notes that are specific to that project. And the easiest way to do that is to simply open the boilerplate notes in Word, or Apple's Pages, and start updating it, start putting in things that are specific to that project, and create a copy of the document in the - let's go to the Documents, Projects, and here's the “Reynolds Residence”. [16:15]

So I've created a copy of the specifications there, and then created a PDF file from that, and inside the PLN, I've used the Drawing Manager to link all of these to the PDF. I'd like to point out one thing that is a subtle feature in the Drawing Manager, that Graphisoft improved over the years. I'm not sure at what point this came in, but I think it's been around for quite a number of versions, yet a lot of people don't know about it. And that is what's called a Relative Path. [16:53]

So you'll see here the company logo has all of these slashes here, and then it records where that path is. Now, the slashes indicate that this is a relative path. It's probably a little bit clearer to understand when I go to the PDF for the specifications, and you'll see it says “/Master_Specification.pdf”. So what does that mean? It's that it's looking for this and it's linked to the file called “Master Specifications”. It's in the same folder, that's what this forward slash refers to. It means the same folder there. [17:33]

So if we were to create a new file, so let's just go and close this up for now, and go back to the floor plan, and let me just create a new file. So I've just created a new file called “Bobrow Residence”, and that is located in the same general area. In this case, it's in my projects folder, and of course it's in a separate folder here. You

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can see where that's located. [18:11]

Now, in the ArchiCAD project, if I go to the Drawing Manager, and we look for those notes, it's saying that the specifications are coming from and the slashes indicate that it's going up out of the Bobrow folder, and then over to the "Reynolds Residence" folder, and finding the specifications within that. So it actually recorded the path to the specifications as saying, "Go up and then over, and then you'll find this file". [18:52]

Now, let me contrast that with another way that we could create a new file. Instead of doing a "Save As", and then having to update the PDF, here's what you can do. So here I'm looking in the Finder, in my Operating System, and I have the "Reynolds Residence" PLN and the "Reynolds Residence" folder of course, and what I'll do is I'll actually duplicate this folder. [19:18]

So I'm going to duplicate it, and you can see now it says, "Reynolds Residence (copy)". Let me just call this something else, like "Boehmer Residence" in honor of my colleague, Scott Boehmer. And you can see here, is the "Boehmer Residence" folder, and of course I'd want to rename the Residence here. So now in the file that we're opening in this manner, we're going to see something a little different in the Drawing Manager. We scroll down to the specifications, and you'll notice that it says the specifications are okay, and they still say "/Master_Specifications.pdf". [20:07]

And what that means it is it's actually going to be looking for the specifications in this folder, rather than in the previous folder. So if I go ahead in Word, and let me just update this for the "Boehmer Residence", let me go ahead and save this in the "Boehmer Residence" folder, replacing that. And create a PDF. And I go back to ArchiCAD, and we go back to the general notes, and I just say "Update". You see now it says "Boehmer Residence". [21:07]

So just to make it really clear what I did that was different, and why this is a good trick to know about; if I go back into my Operating System, the Finder, I took a project folder and duplicated it to create the new project. And by doing that, the PLN file kept the link that was local. Meaning that the earlier residence project went looking for the PDF file within the same folder. And by duplicating this, then the new residents file, the new PLN, is looking for the PDF in the same folder. It's going to be linked there. [21:56]

So while I wouldn't necessarily be picking one project and duplicating it, because I think that that's probably less effective than using a template, what I would suggest is that as I went into one of the earlier lessons, is that you have a typical project folder that you duplicate. And when you duplicate that typical project folder, you're going to have a copy of your template within it that is already a PLN file. So imagine that this was actually a project folder, and that that project folder just had the name here. [22:48]

So now, when I duplicate the project folder, and in the new folder I change the project name to the appropriate client, and change the folder name to the appropriate client, then I end up with something like what we just created here for the Boehmer Residence, where we've got a new project ready to go, but it's already linked to the specifications in here. And I have a copy of the boilerplate specifications ready to be updated. So I can basically open this up in Word, or in Apple Pages, make changes, update the PDF, and then

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the PLN file will actually update automatically because it will be linked locally. [23:39]

So just to see whether a link is relative or not, if we go back to the Drawing Manager, what you'll see, if I highlight any one of these here, and I go to the Settings, you'll see that the link here is on a relative path. And so that means that it's recording its location relative to the project, as opposed to something that might be an absolute path. If I were to change this, perhaps, to the absolute path, you'll see that it records this longer path. See you can actually switch it on the fly in later versions of ArchiCAD to say, "You want to record the source file based on the absolute path or the relative path?" [24:32]

And having it in a relative path will mean that if you do duplicate the folder, it will keep that link. This is also good when you want to take a file from one computer to another, perhaps a desktop to a laptop, or work to home, is that you take the entire project folder along with you, and it's ideal to have your Drawing Manager, the links, in most cases set to be relative. So that's going to be another very useful tip is to understand the difference between relative and absolute. [25:06]

Addressing for the Drawing Manager, for anything that's coming from outside the project as opposed to internal views, which are like schedules and sections and elevations, but from anything outside the project, to have it as a relative path will simplify duplicating project folders or taking an active project folder off to another computer to work on. So this concludes our section of the third week, our final section of the third week on general notes and specifications with a lot of tips and tricks about the Drawing Manager and updating for when you're creating new projects. Thanks for watching.