Curing a Lack of Coordination – How to Use AutoCAD Sheet Sets

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Learning Objectives

- Learn how to set up and use the Sheet Set Manager
- Learn how to import existing drawings and manage them using the Sheet Set Manager
- Learn how to create sheets with title block data that populates automatically
- Learn how to place views that are labeled automatically and callouts linked to those views


Description

Do your documents suffer from a lack of coordination? Learn how to use the Sheet Set Manager in AutoCAD software to manage and automate the creation of complete, organized sets of drawings. In this class, you'll learn how to use the Sheet Set Manager to manage existing drawings, plot and publish using sheet sets, create new drawings with title block data that populates automatically, and also add sheet labels, view labels, and callouts with everything linked together to create fully coordinated sets of documents.

Speaker(s)

David is the Senior Content Manager for CADLearning® products at 4D Technologies, where he develops content standards and creates microlearning that is immediately actionable and leads to better knowledge retention for Autodesk AutoCAD, AutoCAD LT, and ReCap users. He has more than 35 years of hands-on experience with AutoCAD and 20 years with Revit as a user, developer, author and consultant, and is an Autodesk Certified Professional for both AutoCAD and Revit. A contributing editor to *Digital Engineering* magazine, he is also the former senior editor of *CADalyst* magazine, and he is the author of more than a dozen books about AutoCAD. A licensed architect, David was also one of the earliest AutoCAD third-party software developers, creating numerous AutoCAD add-on programs. As an industry consultant, David has worked with many companies, including Autodesk. He has taught college-level AutoCAD courses and has consistently been a top-rated speaker at Autodesk University.

Introducing Sheet Sets

Most projects consist of multiple drawings, and the deliverables on most projects often consist of a collection of numbered, cross-referenced sheets. While you can certainly create and manage these drawings manually, AutoCAD's sheet set functionality provides a handy tool that automates this process.
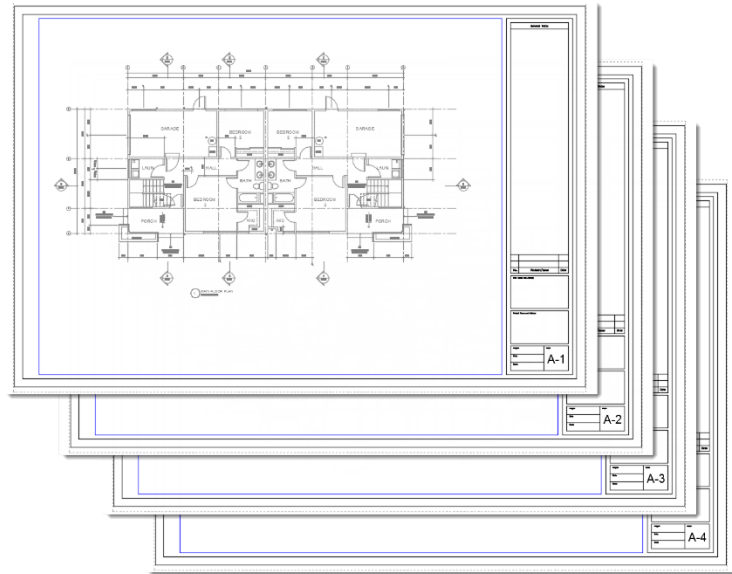

Sheet sets enable you to organize and manage collections of drawings. A *sheet* is a selected layout from a drawing file. You can import a layout from any drawing into a sheet set as a numbered sheet. A *sheet set* is an organized and named collection of sheets from several drawing files. Once created, you can manage, transmit, publish, and archive sheet sets as a unit.
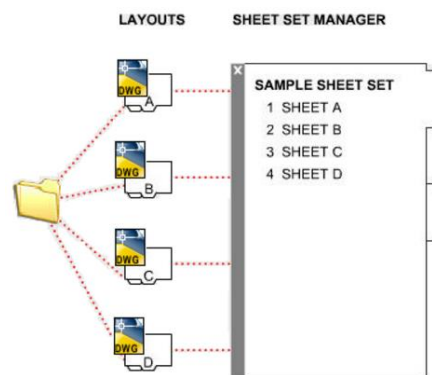
Sheet sets are created, organized, and managed using a special palette called the Sheet Set Manager. Tools in this palette enable you to create a new sheet set, open an existing sheet set, or switch between open sheet sets.

The Sheet Set Manager has three tabs: Sheet List, Sheet Views, and Model Views. The Sheet List tab displays an organized list of all sheets in the sheet set. Each sheet in a sheet set is a specified layout in a drawing file. On the Sheet List tab, sheets can be arranged into collections

called *subsets*. This is a handy way to organize sheets by discipline. For example, in a building project, you might create subsets for architectural and structural sheets. You can nest subsets as needed. After you create or import sheets or subsets, you can reorder them by dragging them within the sheet list.
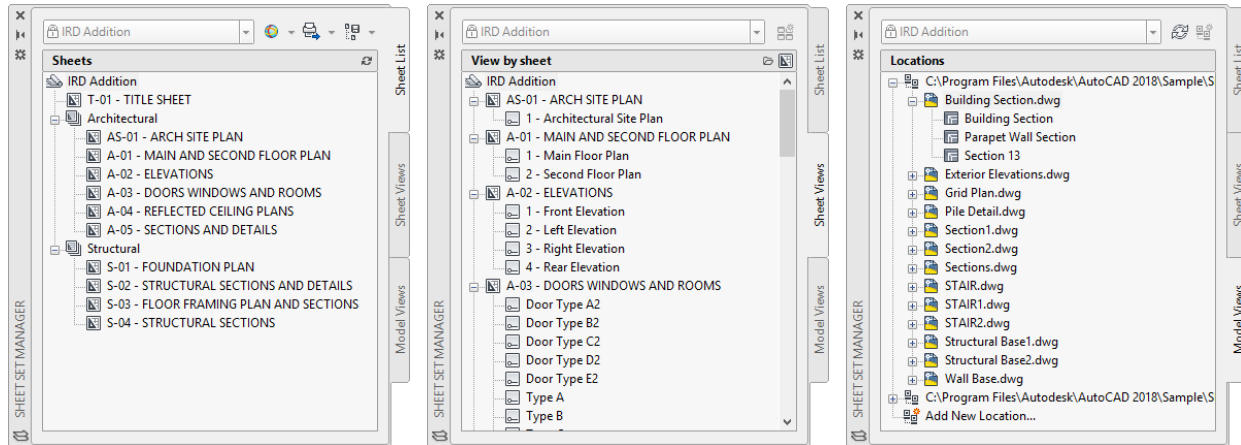
The Sheet Views tab displays an organized list of all sheet views in the sheet set. The information on this tab can be arranged by displaying the views by sheet; in other words, based on the sheet on which the view is located. Or, you can see the views organized by category. For example, on a building project, you might have categories for elevations, floor plans, and so on. Again, you can create categories as needed, nest categories into other categories, and move views from one category to another.

The Model Views tab lists the paths and folder names for drawings containing model space views to be used in the sheet set. You can click a folder to see a list of drawing files located in that folder. Click a drawing file to see a list of the named model space views that are available for placement in the current sheet. You can double-click a view to open the drawing containing that view. And you can right-click or drag a view to place it in the current sheet.

Although the palette includes numerous buttons that provide convenient access to the most commonly used operations on that tab, to use the Sheet Set Manager efficiently, right-click to access tools in the shortcut menu. For example, when you right-click the sheet set, you see tools to close the sheet set, add a new sheet, add a new subset, import a layout as a sheet, resave all sheets, archive the sheet set, publish the entire sheet set, eTransmit the entire sheet set, and so on.

When you right-click a sheet subset, the tools enable you to collapse the subset, add a new sheet to that subset, add a new subset nested within that subset, import a layout as a sheet in that subset, resave all the sheets in that subset, publish just that subset, eTransmit just that subset, and so on.

Each sheet set provides properties you can use to automate various processes. For example, standard properties enable you to establish a project number, project name, and so on. You can also create custom properties for things such as identifying who created or checked a drawing. You can then use fields to automate the data that appears in view labels, title blocks, plot stamps, and callouts.

You can also assign a drawing template file to a sheet set, making it easy for you to create new sheets directly from the Sheet Set Manager.
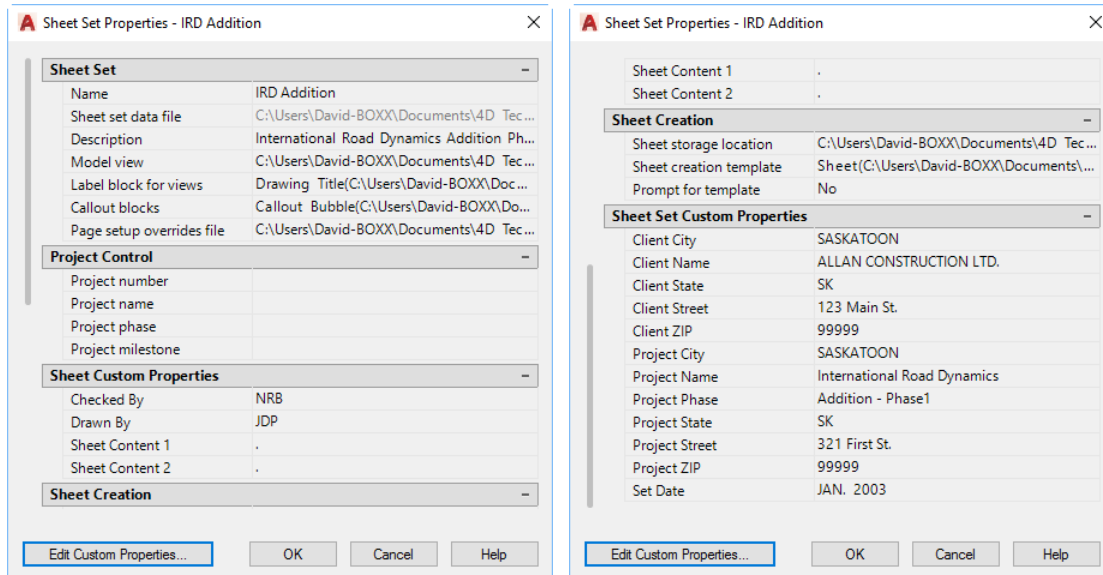
And by using sheet set properties, you can easily plot to any named page setup, regardless of the page setup that is saved in each of the drawing layouts.

At first glance, the powerful functionality offered by the Sheet Set Manager may seem overwhelming, but you do not need to implement all the functionality at once. You can begin to take advantage of sheet set functionality for your current project with minimal effort by importing your current drawing layouts into a sheet set, so that you can easily open drawings from a central location while you continue to edit those drawings using conventional tools. Once you feel comfortable using the most basic sheet set functionality, you can implement more advanced capabilities.

The drawing files created and managed by the Sheet Set Manager are just like any other drawings you create using traditional methods. You can draw geometry in model space, create additional layout tabs, and so on. The only technical limitation is that each sheet in the Sheet Set Manager list can only point to one layout in a drawing file. If you have more than one layout in your drawing, you can import those additional layouts as additional sheets in your sheet list.

There is no technical reason why you cannot have multiple layouts in your drawing; however, the best practice for using sheet sets is to have one sheet per drawing file for each sheet in your set. The main benefit for this is to enable multiple users to work on different sheets at the same time. If you have two sheets that point to two different layouts within the same drawing, the drawing file will become locked as soon as one person opens one of those sheets, which is how AutoCAD has always worked.

Even after implementing sheet sets, the drawing files included in the sheet set are not changed. The sheet names in the sheet list are like shortcuts or pointers to the layouts in those DWG files. The program does not create any new drawings or folders. It simply creates a sheet set data file with a .dst file extension. If the sheet set is open in the Sheet Set Manager and you open and save a drawing file that is being pointed to by the sheet set, a small piece of data—a

"hint"—will be saved with the drawing. This tells the drawing file which sheet set it belongs to. This enables the program to open the appropriate sheet set, even if you open the drawing using traditional methods. This "hint" is the only change the program makes to your original drawing. If, for any reason, you want to undo the sheet set, you can close the sheet set and then delete the DST file. If you delete the DST file without first closing the sheet set, the DST file will be automatically recreated. After successfully deleting the DST file, you can open and save the associated drawings to remove the hints.

Regardless of whether you use just the basic sheet set functionality or implement all the features, sheet sets will help you save time and work more efficiently.

Understanding the Sheet Set Manager

To work with sheet sets, you must first open the Sheet Set Manager:
- From the **Start** tab, click **Open a Sheet Set…**
- From the **Application Menu**, choose **Open > Sheet Set**

If you already have a drawing open:
- On the **View** ribbon, in the **Palettes** panel, click the **Sheet Set Manager** tool
- Press **CTRL+4**
- Type the keyboard shortcut **SSM**

The Sheet Set Manager behaves like any other palette. It can be moved, resized, anchored on the left or right side of the drawing window, set to auto-hide, and so on.

To work with an existing sheet set, you must open it in the Sheet Set Manager. The program comes with several sample sheet sets. In the **Sheet Set Manager** palette, expand the drop-down in the upper-left and choose **Open…**. The program displays the **Open Sheet Set** dialog. When you navigate to a folder containing a sheet set data file, you can see that it has a .dst file extension.

When you open a DST file, you see all the sheets in the sheet set. If the sheet set includes subsets, you can collapse and expand those subsets.

When you hover the cursor over a sheet set in the Sheet Set Manager, you see a panel that displays a preview image of the sheet, along with information about that sheet, such as its status, the sheet set name, the actual file name and file location, when it was last saved and by whom, its sheet size, and so on.

When you double-click a sheet in the sheet list, that drawing immediately opens to the specific layout tab. Also, note that when a sheet in the sheet set is open for editing, a lock icon appears adjacent to that sheet in the Sheet Set Manager. And when you hover the cursor over that sheet in the Sheet Set Manager, in the preview panel, you can see that its status has changed to Locked for Edit. You can even see who is working on the drawing. When you close that drawing and then hover the cursor over its sheet, you can see that the drawing is once again accessible. But the lock icon still appears in the Sheet Set Manager. To update the sheet status, click **Refresh sheet status**.

You can have multiple sheet sets open at the same time. When you open multiple sheet sets, they all appear in the drop-down in the Sheet Set Manager palette. To switch to a different open sheet set, expand the drop-down and choose the sheet set.
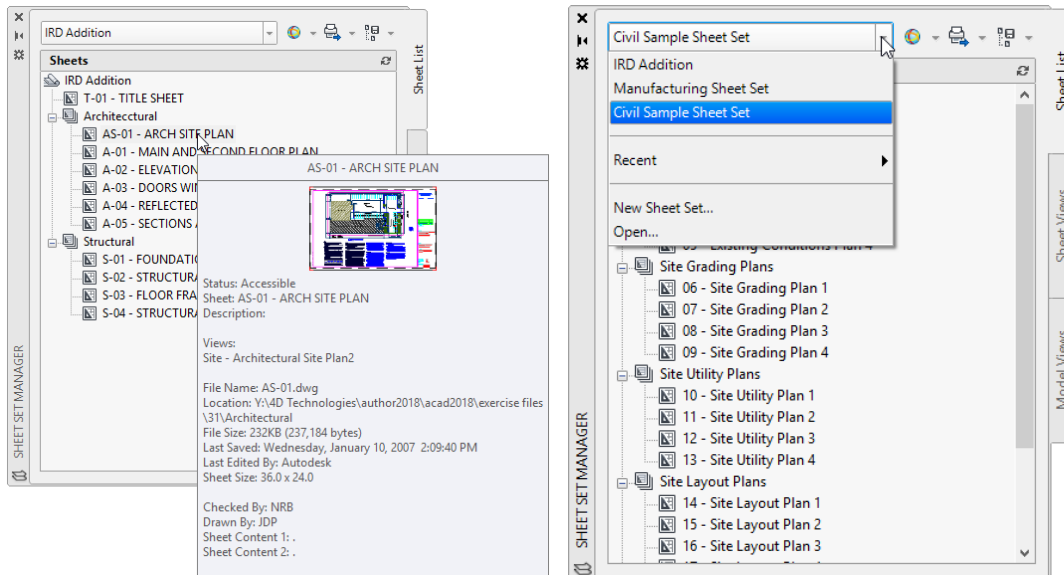
Sheet sets remain open until you close them or exit from the program, even if you close the Sheet Set Manager. To close a sheet set, right-click the sheet set and choose **Close Sheet Set**.

The program remembers up to 10 sheet sets that you have previously opened. To reopen one of those sheet sets, expand the drop-down, choose **Recent**, and then select the sheet set you want to reopen.
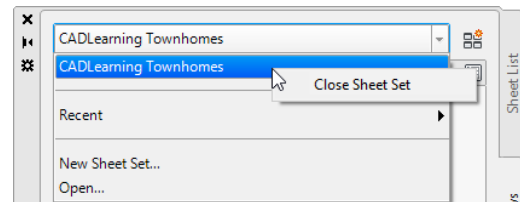
Once a layout has been included in a sheet set, if you open the drawing directly, the program automatically opens the Sheet Set Manager and loads the appropriate sheet set.

Creating a New Sheet Set

The first step in implementing sheet set functionality is to create a sheet set. You can create a sheet set using an example sheet set or by simply importing existing drawing layouts as sheets. To create a new sheet set based on existing drawings, those drawings must use layouts. This process does not alter those drawings. It simply creates a sheet set file—a file with a .dst file extension—which includes pointers to those drawing files.

To create a sheet set, do one of the following:
- In the **Sheet Set Manager** palette, expand the drop-down in the upper-left and choose **New Sheet Set…**
- In the **Application Menu**, choose **New > Sheet Set**

Either of these actions opens the **Create Sheet Set** wizard, which will step you through the process of creating a new sheet set.

To create a new sheet set based on existing drawings:

1. On the first page of the wizard, choose **Existing Drawings**, and then click **Next >**.
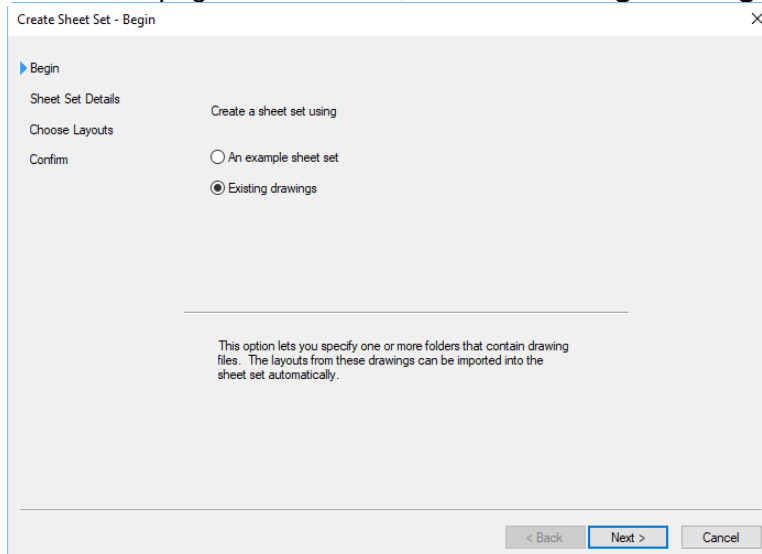

2. On the **Sheet Set Details** page, in the **Name of new sheet set** field, enter the name for the sheet set. In the **Description** field, you can optionally enter a description for the sheet set. In the **Store sheet set data file (.dst) here** field, specify the location in which you want to store the sheet set data file (typically, the main folder for this project). Although you could set the sheet set properties at this point, it is a simple matter to go back and set them later. Click **Next >**.
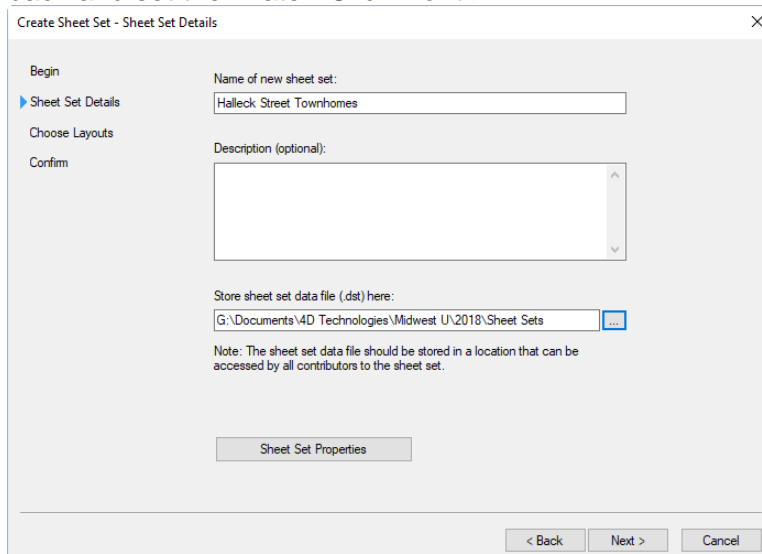

3. On the **Choose Layouts** page, click the **Browse…** button. The program displays a **Browse for Folder** dialog. Navigate to the folder where your project drawings are located. Typically, this would be the main folder that includes project drawings and/or drawing subfolders. Select the folder, and then click **OK**.

4. Also on the **Choose Layouts** page, you see a list of layouts that were found in the folder you selected. You can expand the folders and drawings so that you can select all the layouts that you want to include as sheets in the sheet set. If your drawings include multiple layouts, they will be displayed in the list. You should only select those drawings and layouts that you want to be represented as sheets. For example, you would not select drawings of model geometry that are used as xrefs.
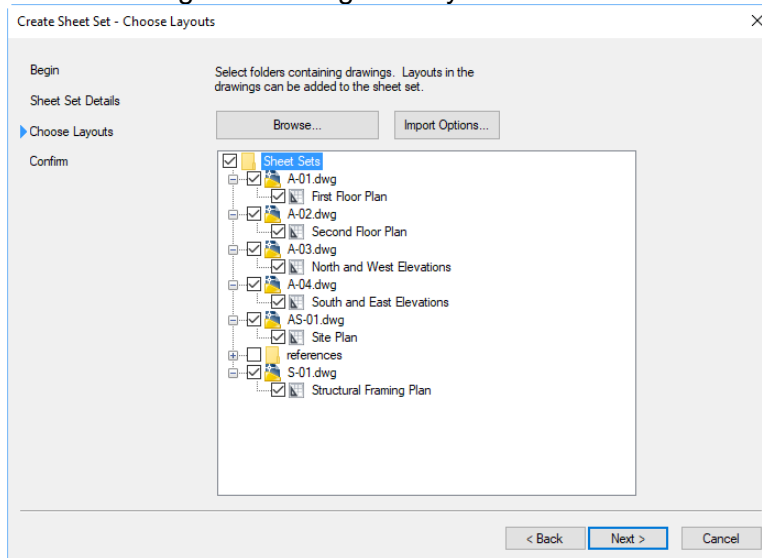
5. Click **Import Options…** to open the **Import Options** dialog. Here, you can specify the options that fit your situation. For example, select **Prefix sheet titles with the file name** so that the drawing file name will be included as part of the sheet name. Since you will not be creating subsets based on the folder structure, leave the other two checkboxes cleared. Click **OK** to close the Import Options dialog. Click **Next >** to move on to the final page of the wizard.
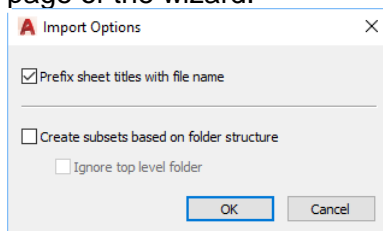

6. On the **Confirm** page, review the sheet set structure. If the sheet set preview is missing sheets or has extra sheets that should not have been included, you can use the **< Back** button to go back to a previous page. When you are satisfied, click **Finish**.

The Create Sheet Set wizard closes, and the sheet set you just created is now open on the Sheet List tab of the Sheet Set Manager. You can see the sheet names. Those are simply shortcuts or pointers to the layouts in the drawing files. The drawing files themselves have not been changed, and the program has not created any new drawings or folders. All it did was create a sheet set data file with a list of sheets that link to your drawings.

At this point, you can use the Sheet Set Manager to organize and open your drawing sheets. You can rename and renumber sheets, change the sheet title, and drag and drop sheets to

reorganize them in the sheet list. For example, when you double-click a drawing in the list, that drawing immediately opens to the specific layout tab.
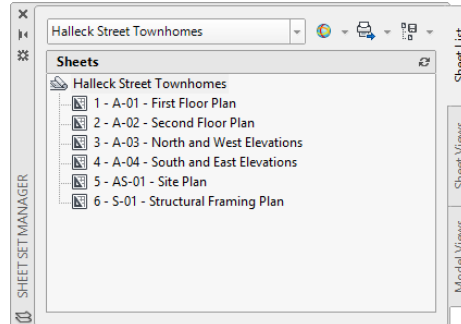

Even if you only use the Sheet Set Manager as a tool for opening your drawings, you will save time and increase efficiency, since you no longer need to navigate through complex folder structures or remember archaic file names. You can just double-click on the sheet name. But as you continue to build on the sheet set functionality, the power of sheet sets will become more obvious. For example, in the title block, you can see that the program automatically added the sheet number, because the title block includes a field corresponding to the sheet number in the sheet set.

Organizing Your Sheets

Once you have created a sheet set, you can use the Sheet Set Manager to edit sheet names and numbers, add and remove sheets, add and remove subsets, and rearrange the sheets and subsets.

To edit sheet names and numbers:

1. Right-click the sheet in the sheet set and choose **Rename & Renumber**.

2. In the **Rename & Renumber Sheet** dialog, you can change the number, sheet title, and so on. In the **Rename options** group box, you also have the option to rename the layout and filename of the associated drawing to match the new sheet title.
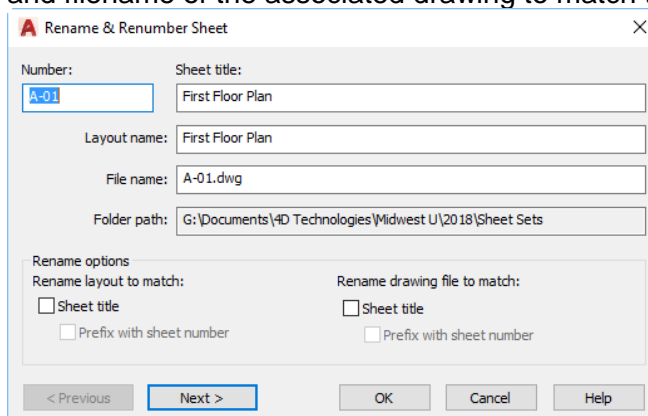
3. Click **Next >** to move to the next sheet in the list, **< Previous** to move to the previous sheet in the list, or **OK** to close the dialog.

To remove a sheet from the sheet set:

1. Select the sheet, right-click, and choose **Remove Sheet**.

2. The program displays an alert asking if you are sure you want to remove the sheet from the sheet set. You must click **OK** to remove the sheet.

When you remove a sheet form a sheet set, you are not deleting the drawing. You are simply removing the shortcut that points to the drawing.

To add a sheet to the sheet set:

1. Right-click a sheet in the sheet set and choose **Import Layout as Sheet…**.

2. In the **Import Layouts as Sheets** dialog, click **Browse for Drawings…** to navigate to the folder containing the drawing whose layout you want to add as a sheet, select the drawing, and click **Open**. You can repeat this step to add additional sheets to the list.
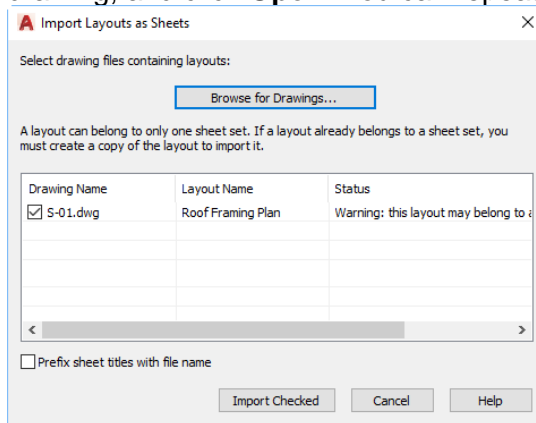

3. Once you are ready to proceed, click **Import Checked**.

You can add subsets to help better organize the sheet sets. A subset is like a visual folder in your sheet list. By default, adding a subset does not create a folder, although you do have the option of creating folders.
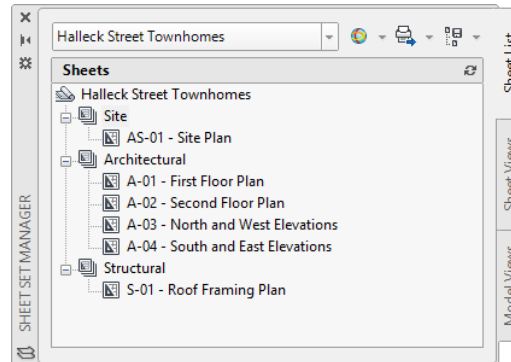
To add a subset:

1. Right-click the sheet set name and choose **New Subset…**.

2. In the **Subset Properties** dialog, click in the **Subset Name** field, and then enter the name of the subset.
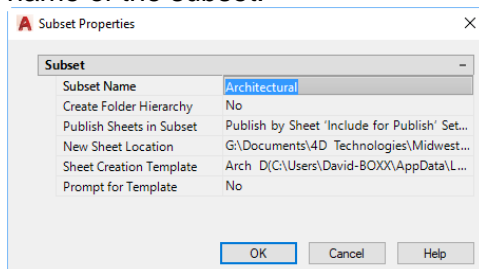
3. When you have finished making changes, click **OK**.

You can right-click and use tools in the shortcut menu to rename or remove a subset. You can also use drag-and-drop to rearrange sheets and subsets.

Once you have created subsets, you can move sheets into the appropriate subsets. When you do this, the sheet numbers do not automatically update to reflect their position in the sheet set. If you want the sheet numbers to correspond to their order in the sheet list, you must manually change them. At this point, the sheet names and numbers are doing nothing more than enabling you to view and access your drawings from the Sheet Set Manager, rather than having to remember the drawing file names and locations. But as you continue to build on the sheet set functionality, the value of sheet names and numbers will become more obvious.

Accessing Your Sheets

The Sheet Set Manager is a great way to organize all the sheets in a project so that you can access them from a single location. You can also include the sheet list as textual information on one of the sheets in your project and use this table of contents to quickly open any of the sheets in the list.

From the **Sheet Set Manager**, open the sheet onto which you want to add the table of contents by double-clicking that sheet in the list.

To insert a sheet list table:
1. In the **Sheet Set Manager**, right-click the sheet set title and choose **Insert Sheet List Table…**.
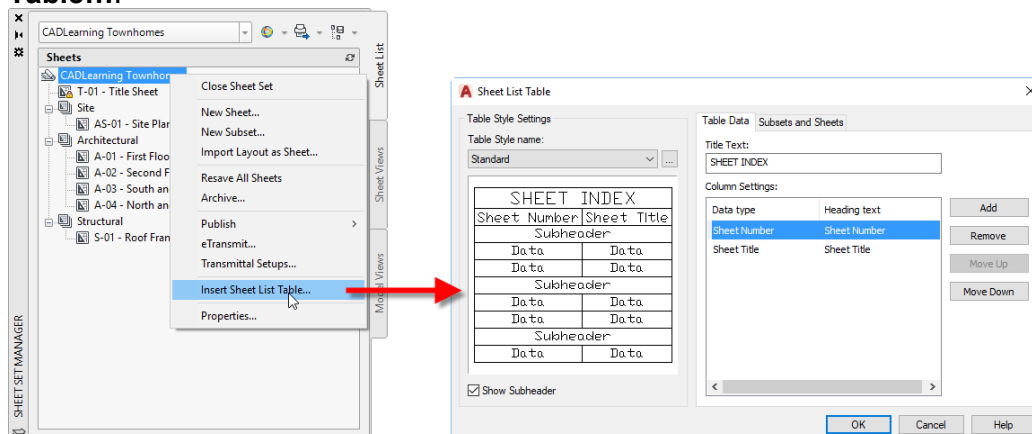
2. In the **Sheet List Table** dialog, select a table style. If you do not have an appropriate table style already established, you can create one on the fly. Remember that since table styles are saved in the drawing, you should add the desired table styles to your template drawing so that you will always have them available.

   Use tools on the **Table Data** tab to control the information included in the sheet list table. By default, the Sheet Number and Sheet Title are included in the list. Use the Add and Remove buttons to change the number of columns included in the table, and the Move Up and Move Down buttons to change the order in which the data will be displayed.

   On the **Subsets and Sheets** tab, you can select the subsets and sheets you want to include. Use the **Show Subheaders** checkbox to control whether the table includes subheaders or not.

3. Once you have finished configuring the sheet list table, click **OK**.

4. Click to place the sheet list table onto the sheet.

The sheet list table is a standard table that contains fields corresponding to the sheet data. **DO NOT** edit the table directly, however, because any changes you make will be lost when you update the sheet list.

To edit a sheet list table after it has been inserted:

1. Select a cell within the table, right-click, and choose **Sheet List Table > Edit Sheet List Table Settings…**.

Any changes you make will be retained even when you refresh the table data.

If you make any changes to the sheet list in the Sheet List Manager, such as adding or removing a sheet, the sheet list table does not automatically update.

To update the table:

1. Select a cell within the table, right-click, and choose **Sheet List Table > Update Sheet List Table**.
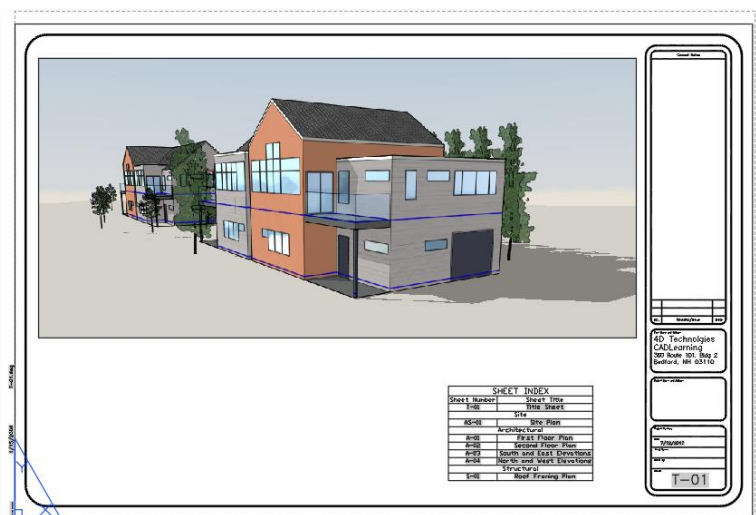
Once you have added a sheet list table to your drawing, you can use it to access sheets in the sheet set, even if the sheet set is not currently open in the Sheet Set Manager or if the Sheet Set Manager is closed. To access sheets from the sheet list table, press the **CTRL** key and then click the sheet in the table. That sheet immediately opens, and its sheet set opens in the Sheet Set Manager.

Importing Existing Layouts

You can use the Sheet Set Manager to import additional drawing layouts into an existing sheet set.

To import a new sheet:

1. In the **Sheet Set Manager**, right-click on the sheet list and choose **Import Layout as Sheet…**.

    Note that where you right-click determines where the new sheet will be added to the list. If you right-click a subset, the new sheet will be added to the end of the subset. If you right-click a sheet, the new sheet will be added below that sheet. After the new sheet has been added, you can drag and drop it in the list.

2. In the **Import Layouts as Sheets** dialog, click **Browse for Drawings…** to navigate to the folder containing the drawing whose layout you want to add as a sheet, select the drawing, and click **Open**. You can repeat this step to add additional sheets to the list.
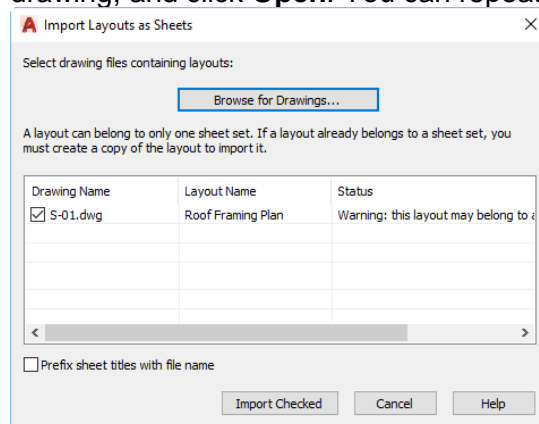
3. Once you are ready to proceed, click **Import Checked**.

Note: You can only import layouts that do not yet belong to a sheet set.

☞ **Tip:** You can also add a layout from a currently open drawing. To do this, drag and drop the layout tab into the **Sheet Set Manager** palette.

Leveraging the Power of Sheet Sets

Sheet sets are a great way to organize and access the drawings created to document a project. But sheet sets can do much more than that. You can use sheet sets to plot and publish drawings, create transmittal sets, and archive drawings at the end of a project. You can also create named sheet selections to make it easier to work with groups of sheets within a sheet set.

Plotting and Publishing Using Sheet Sets

Suppose you were in the middle of working on a drawing for a new project when you received a request to plot a copy of the drawing for a completely different project. If you had not used sheet sets to organize and manage that earlier project, you would likely have to stop what you were doing, navigate to the folder containing the drawings for that earlier project, open each drawing, select the proper layouts, and then plot each drawing. As you do this, other members of the project team who tried to open drawings from that earlier project might discover that they could not work on those drawings because, since you had opened them, the drawing files were locked.

But by using sheet sets, you can significantly reduce the amount of time you spend plotting your drawings. Even if you are unfamiliar with a project, you can quickly print the entire sheet set without having to open and view each drawing file. And your coworkers can continue editing the drawings while you use the Sheet Set Manager to send the entire set of sheets to their default plot device.
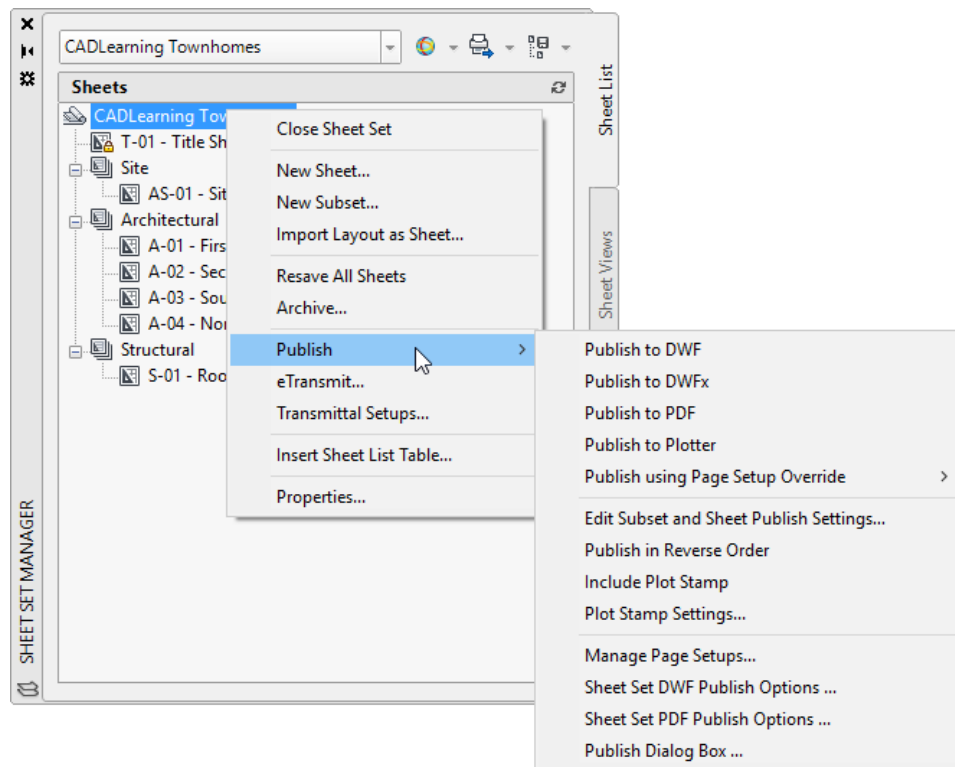
In the **Sheet Set Manager**, open the sheet set containing the sheets you want to print. Even though you have not actually opened any of the drawings, you can plot the entire sheet set, a subset, individual sheets, or any sheets you select.

To print all the sheets:
1. Right-click the sheet set title and choose **Publish > Publish to Plotter**. The program quickly prints all the sheets in the sheet set to the device specified in the page setup for each sheet.

**To print the sheets in a subset:**
1. Right-click the subset and choose **Publish > Publish to Plotter**.

To print just selected sheets:
1. Use the **SHIFT** and/or **CTRL** keys to select individual sheets.
2. Right-click and choose **Publish > Publish to Plotter**.

When you right-click and hover the cursor over **Publish**, in addition to publishing to the plotter specified in the page setup, you can publish the sheets to a DWF or PDF file. You can also publish in reverse order, include a plot stamp, and adjust the plot stamp settings.

If you select **Edit Subset and Sheet Publish Settings…**, the program displays the **Publish Sheets** dialog. Here, you can select which sheets you want to publish. Any changes you make here will be saved as part of the sheet set. For example, if you clear the check mark adjacent to a subset, that subset will not be printed, and you will no longer be able to publish sheets in that subset until you include it again.
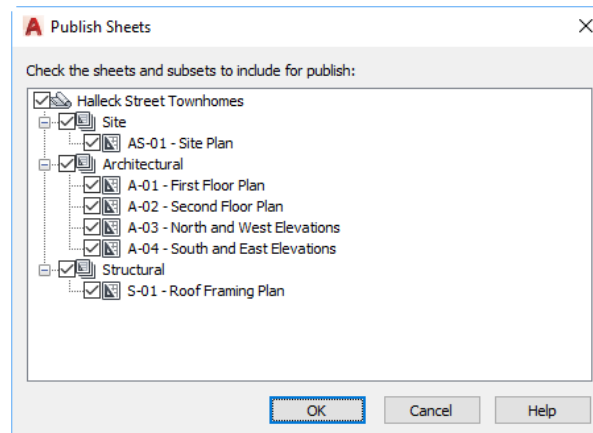
In addition to plotting and publishing using the shortcut menu, you can use buttons located at the top of the Sheet Set Manager. For example, you can expand the **Export** split-button to export the sheet set as a DWF or PDF file, or click **Publish** to access the various publish tools.
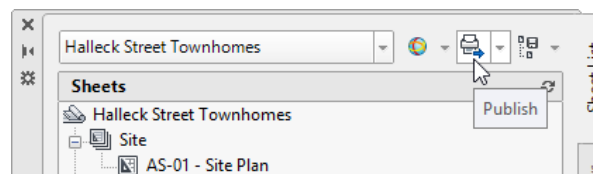
Creating Transmittal Sets Using Sheet Sets

Projects typically consist of collections of multiple, cross-referenced sheets, whose drawings often include numerous other files, such as external references, images, and fonts. When someone asks you to send them a drawing, you need to make sure that you also include all those other files as well. Rather than having to manually select all those other files, you can use the eTransmit tool to automatically package the drawing and its associated files into a single folder or a ZIP file. When you send the transmittal set rather than just the drawing, you help ensure that the recipient receives all the necessary files.

While you can use the eTransmit tool without using sheet sets, when you use eTransmit in the current drawing, it only packages the files associated with that specific drawing. You can manually add other drawings to the transmittal set, but that process can also be quite time consuming when working with many drawings. Using eTransmit with a sheet set enables you to package multiple drawings and all their associated files with minimal effort.

To transmit all or part of a sheet set, you should first close or save any open sheet set drawings that have been edited. You can then start the eTransmit tool from within the Sheet Set Manager and use it to send the entire set, a subset, or selected sheets within the set. It simply depends on where you right-click and what sheets have been selected. To transmit a subset, right-click the subset. To transmit individual sheets, you could press CTRL, select the sheets, and then right-click.
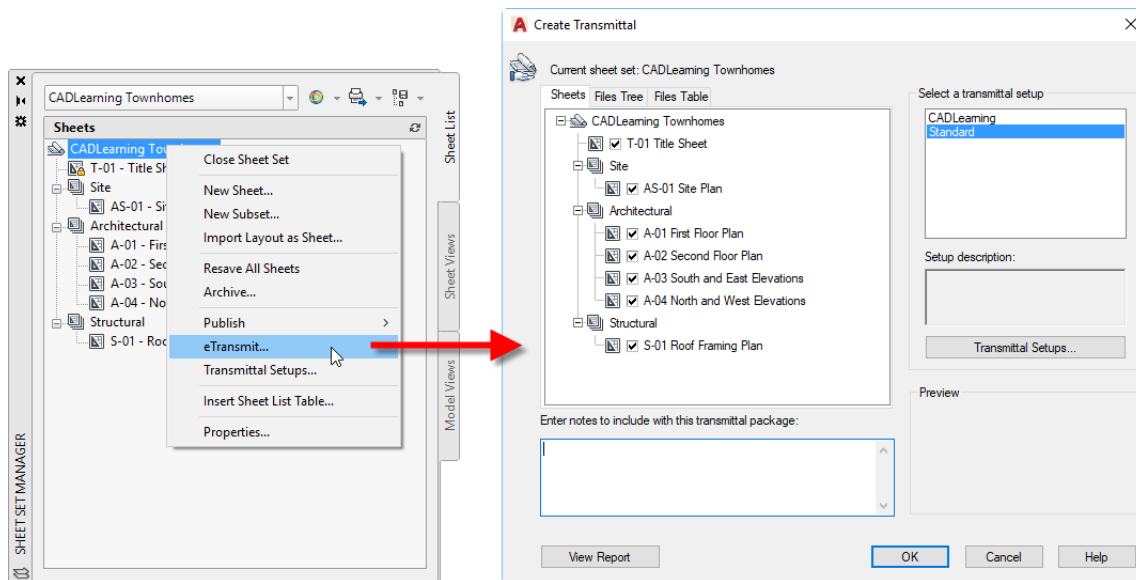
To transmit the entire set, in the **Sheet Set Manager**, right-click the sheet set title and choose **eTransmit**. The program displays the **Create Transmittal** dialog. This is the same dialog you see when you start the eTransmit tool from the Application menu, but in this case, you see all the sheets in the sheet set. The dialog has three tabs. The **Sheets** tab lists the sheets to be included in the transmittal package. In this case, since you had right-clicked the sheet set title, all the sheets are selected, but you can easily remove sheets by clearing their checkboxes.

When you switch to the **Files Tree** tab, you see the files to be included in the transmittal package. The list shows the actual sheet drawings and the sheet set files, which include the

sheet set data file (the .dst file) and the sheet set template file (the .dwt file). You can expand any of these to see the other files referenced by those files. You could also click **Add File…** to add other files to the transmittal package. The **Files Table** tab shows this same information as a simple list.

You can also enter any notes you want to include with the transmittal report. You can specify a template of default notes to be included with all your transmittal packages by creating an ASCII test file called etransmit.txt. That file must be saved to a location specified in the Support File Search Path option on the Files tab in the Options dialog.

The program comes with a default transmittal setup named **Standard**. In the **Select a transmittal setup** group box, you can select the **Standard** transmittal setup, or any other transmittal setup you have previously created.

To create a new transmittal setup, click **Transmittal Setups…**. The program displays the **Transmittal Setups** dialog. Here, you can modify any existing transmittal setup, create a new transmittal setup, or delete an existing setup.
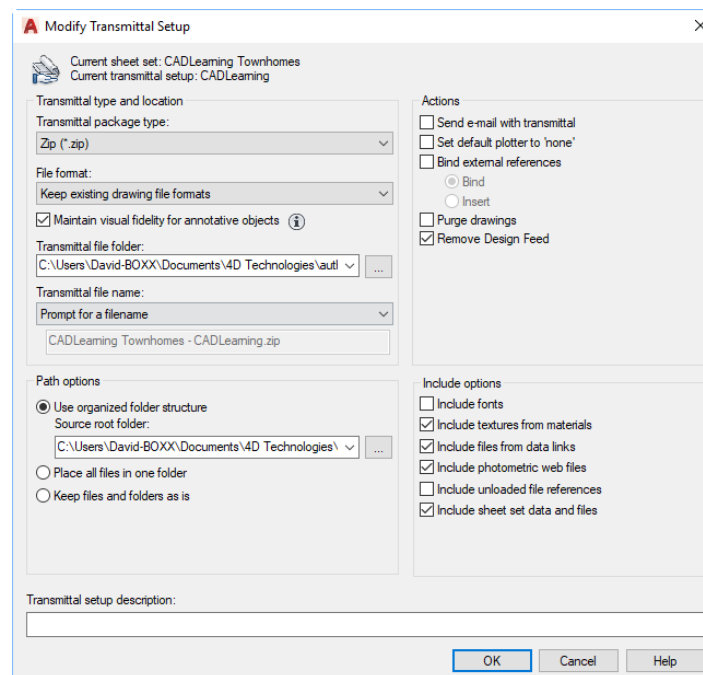
When you create a new transmittal setup or modify an existing setup, the program displays the **Modify Transmittal Setup** dialog. Here, you can configure the settings you want to use for the transmittal setup. Once you have configured the transmittal settings as desired, click **OK**. Then, click **Close** to close the Transmittal Setups dialog.

When you are ready to create the actual transmittal set, in the **Create Transmittal** dialog, click **OK**. The program displays a file dialog so you can control where the transmittal set is saved. The type of transmittal created will depend on the transmittal setup. Click **Save** to begin creating the transmittal set. Once it has been created, you can send the transmittal set to whoever needs to receive it.

Creating Archive Sets

When you have completed a project, you may want to archive the project and then remove it from the drive on which you keep your active projects. Rather than having to manually select all the files used by the sheet set, you can use the Archive tool to automatically package the drawings and all associated files to a single folder or ZIP file. When you use the Archive tool, you can rest assured that the archive contains all the necessary files.

Creating an archive set is very similar to creating a transmittal set, but whereas the eTransmit tool can be used with any drawing, the Archive tool only works with sheet sets.
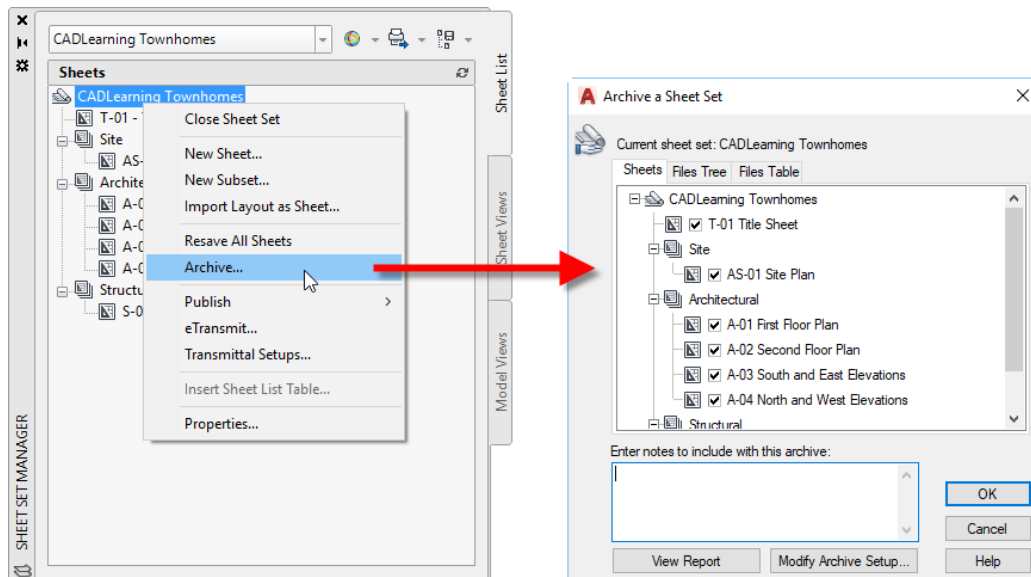

To archive a sheet set, you should first close or save any open sheet set drawings that you have edited. You can then access the Archive tool from either the Sheet Set Manager or from the Application menu. With the Sheet Set Manager closed, however, when you expand the **Application** menu and choose **Publish** > **Archive**, the program displays an alert to inform you that no sheet set is open.

In the **Sheet Set Manager**, right-click the sheet set title, and in the shortcut menu, select **Archive…**. The program displays the **Archive a Sheet Set** dialog. This dialog is nearly identical to the one you see when using the eTransmit tool, and the process is very similar.

Using Named Sheet Selections

As you continue to use sheet sets, you may want to have different sheet selections. For example, you may want to plot the entire sheet set for a design review, but create a transmittal set of just the architectural floor plans for the interior designer. Rather than having to select the appropriate sheets each time you need to send a set of documents, you can create named sheet selections.

To create a named sheet selection, first select several sheets and/or subsets using the SHIFT or CTRL keys. Then, right-click and choose **Save Sheet Selection…** from the shortcut menu. The program displays the **New Sheet Selection** dialog. Enter the name you want to assign to the sheet selection, and then click **OK**.
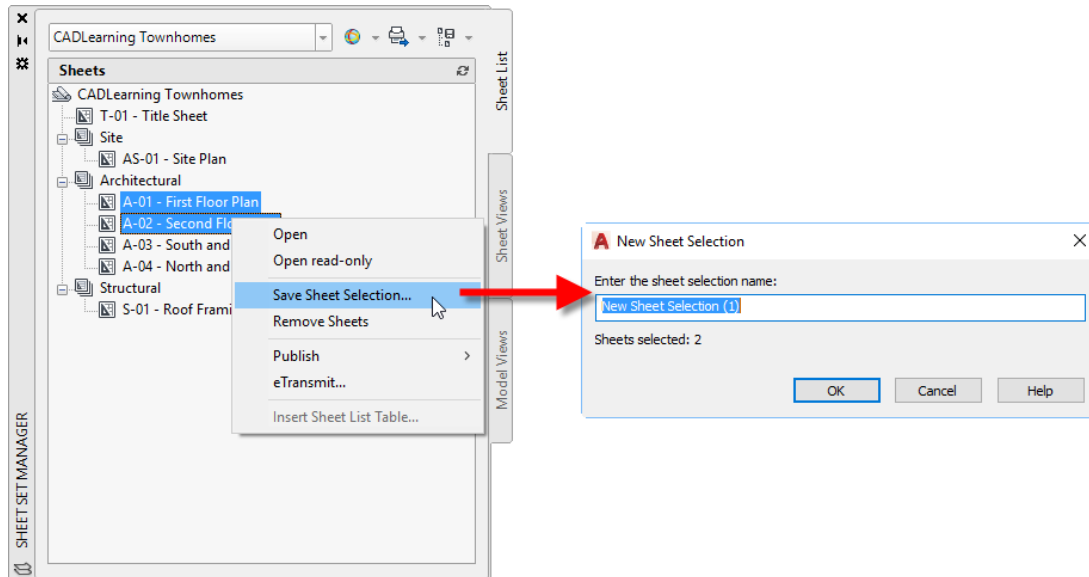
You can also create a named sheet selection using a tool in the **Sheet Set Manager**. In the sheet list, select the sheets. Then, click **Sheet Selections** to expand the drop-down and choose **Create…**. Again, you see the **New Sheet Selection** dialog. Enter the name you want to use, and then click **OK**.

Once you have saved one or more named sheet selections, you can restore and manage them. For example, to print copies of just those sheets in a sheet selection, expand the **Sheet Selections** drop-down and choose the sheet selection. The sheets belonging to that sheet selection are immediately highlighted in the sheet list and are ready for you to plot, publish, or eTransmit.
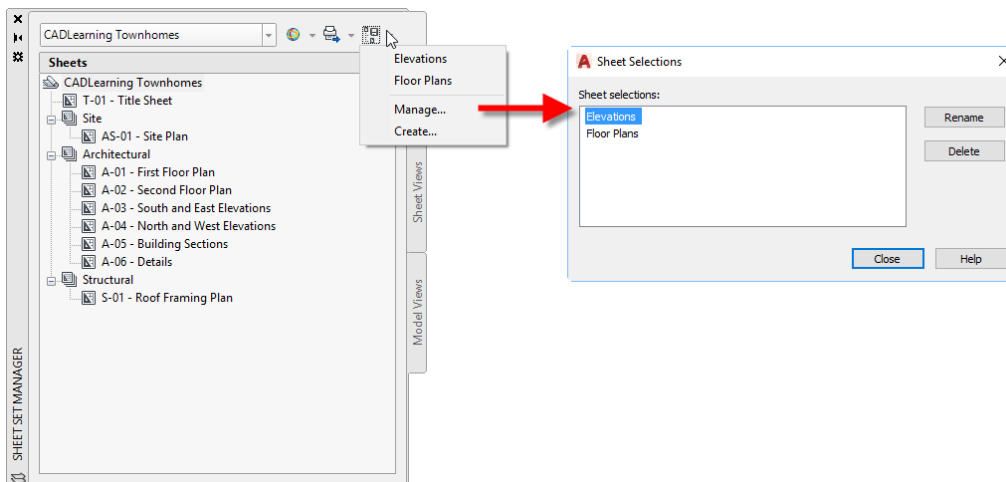
You can also use this tool to manage your named sheet selections. Expand the **Sheet Selections** drop-down and choose **Manage…**. The program displays the **Sheet Selections** dialog. Here, you can choose an existing named sheet selection and then click **Rename** or **Delete**.

Making the Most of Sheet Sets

As you have already seen, sheet sets provide a great way to organize all the sheets in a project so that you can access them from a single location. For example, you can use the basic sheet set capabilities to open, manage, share, and print any or all the drawings in a project. But for maximum productivity, you will need to assign various sheet set properties. You can then use sheet sets to automate many document management operations.

Working with Sheet Set Properties

Assigning various sheet set properties lets you take full advantage of sheet sets.

In the sheet list, right-click the sheet set title and choose **Properties…** to open the **Sheet Set Properties** dialog.

Note: You can access a similar dialog box to set properties for subsets and individual sheets.
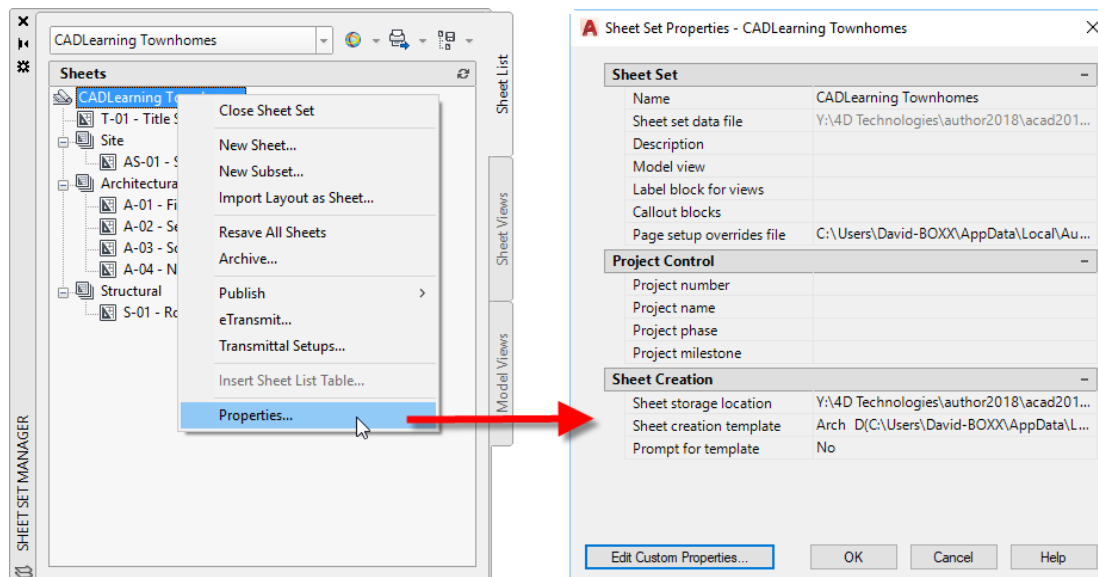
The Sheet Set Properties dialog initially includes three panels: Sheet Set, Project Control, and Creation. The Sheet Set section includes properties for the Name, Sheet set data file, Description, Model view, Label block for views, Callout blocks, and Page setup overrides files.

The Name property is the name of the sheet set. It uses the name you provided when you first created the sheet set. That name was also used as the name of the sheet set data file (the DST file). You can change the name of the sheet set using the Sheet Set Properties dialog. However, the name of the sheet set data file will not change. If you want to change the name of the DST file, you must close the sheet set and then use Windows Explorer to rename the DST file. The Description property shows the description you entered when you first created the sheet set. You can edit the description here, if you wish.

The Project Control panel includes four standard sheet set properties. These can be used to automate the data that appears in title blocks. For example, to assign a project number that will appear in the title block of all sheets in the sheet set, click in the **Project number** property field to make it active, and then enter the project number. Then, click in the **Project name** property field

to make it active and enter the project name. When you have finished entering sheet set project properties, click **OK** to close the Sheet Set Properties dialog.

If the title block on the sheet includes attributes linked to sheet set properties, the appropriate information in the title block will be filled in automatically.

Creating Custom Sheet Set Properties

Some sheet set properties, such as the sheet number, are assigned automatically when you organize the sheet set. Other properties, such as the project number and project name, are standard properties that are always available when working with sheet sets. To use them, you must specify those properties, and then include them as fields within your drawings.

You can also define custom properties. These can apply to the entire sheet set, or they can vary on a per-sheet basis. For example, you might create custom properties for the project address and then include those properties in the title block for every sheet in the project. In addition, you might create a custom property indicating who created a specific sheet, which would vary on a sheet-by-sheet basis.
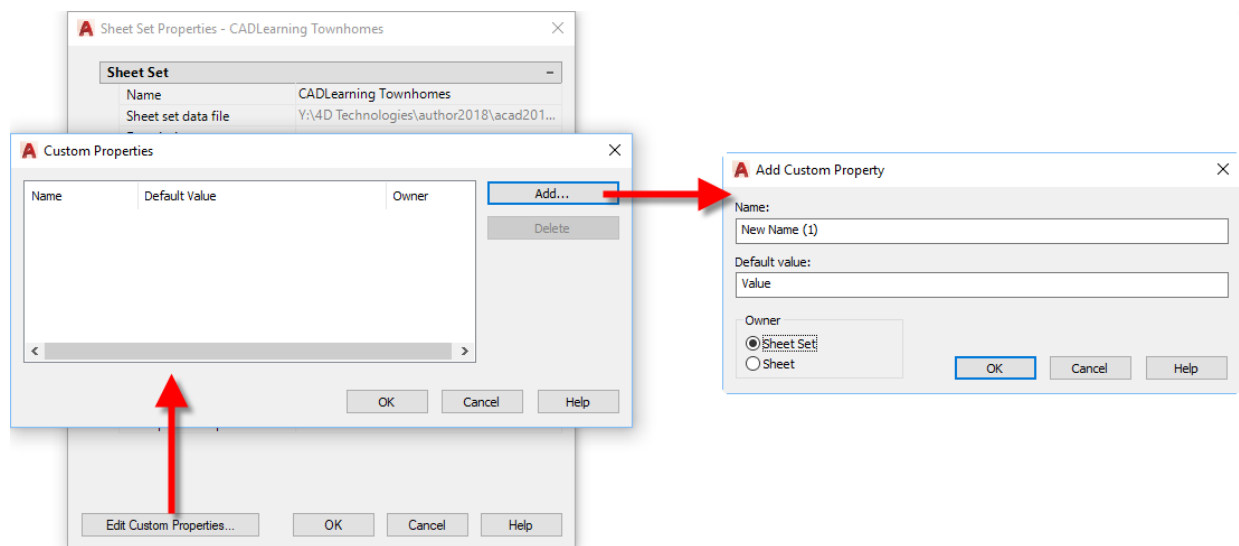
To add a custom property:

1. In the sheet list, right-click the sheet set title and choose **Properties…**.

2. In the **Sheet Set Properties** dialog, click **Edit Custom Properties…**.

3. In the **Custom Properties** dialog, click **Add…**.

4. In the **Add Custom Property** dialog, in the **Name** field, enter the name of the custom property (such as "**Project_Address_1**").

    ☞ **IMPORTANT:** This field is case-sensitive. Later, when adding attributes linked to fields, you must be sure to enter this name **_exactly_** as you enter it in this field, or the automation will fail.

5. In the **Default value** field, enter a default value, or leave the word "Value" as the default. (It may be helpful to enter something meaningful to help you remember the purpose for

the property. For example, for the "Project_Address_1" field, enter the default value "Street address".)

6. Under **Owner**, select:
   - **Sheet Set** – if the property applies to every sheet in the sheet set
   - **Sheet** – if the property varies on a sheet-by-sheet basis

7. Click **OK** to close the Add Custom Property dialog.

8. Repeat steps 3 through 7 for each custom property.

   For this exercise, create a total of three custom properties.

Name	Default value	Owner
Project_Address_1	Street address	Sheet Set
Project_Address_2	City and State	Sheet Set
Drawn_By	Joe Drafter	Sheet

9. When you are finished, click **OK** to close the Custom Properties dialog, and then click **OK** to close the Sheet Set Properties dialog.

After you create custom sheet set properties, you can insert them as fields in your drawings. You can use them anywhere that you can insert a field, but the most obvious use for these custom properties is in your title block.

Creating New Sheets

When you create a new drawing by using traditional methods—such as using the NEW command—you must use an existing drawing file as a template. The existing drawing could be a DWG file (a drawing), a DWT file (a template), or a DWS file (a drawing standards file). The template you use might be one of the default files that comes with the program, or more likely, one of your own customized drawings that contains layers, a title block, and other information specific to your project or company.

To create new sheets more efficiently, however, you can set the sheet creation properties in the sheet set to use a specific template file, and then create new sheets directly from the Sheet Set Manager.

To set the sheet creation template:

1. In the **Sheet Set Manager**, in the sheet list, right-click and choose **Properties…**.

2. In the **Sheet Set Properties** dialog, in the **Sheet Creation** panel, click the **Sheet creation template** field to make it active, and then click the adjacent button to open the **Select Template** dialog.

   By default, the sheet creation template uses a DWT file that was installed as part of the program.
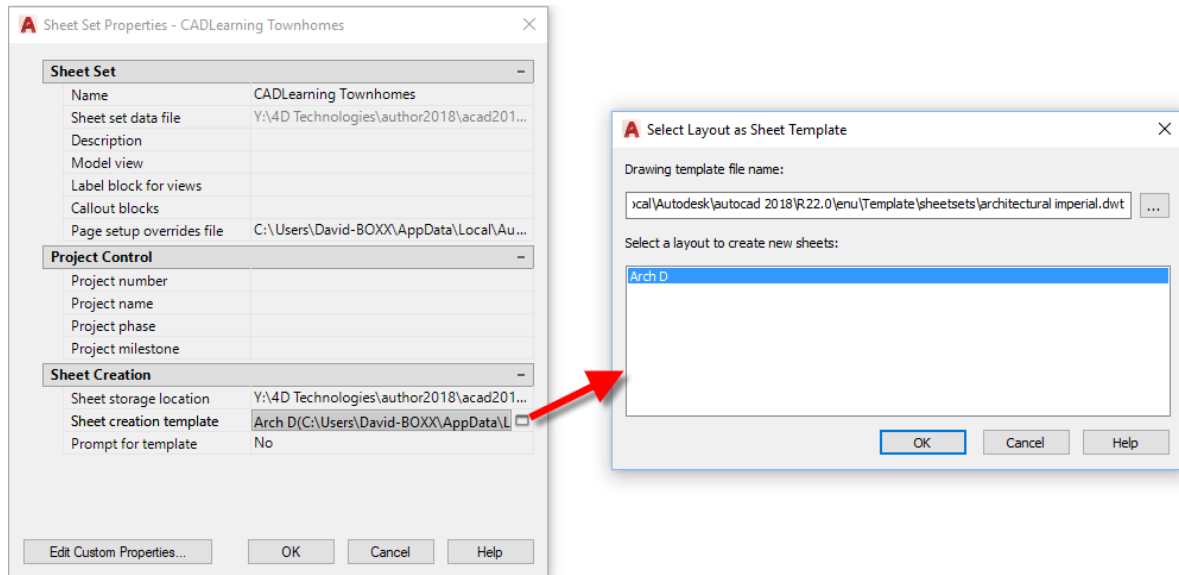
3. To use a different template, click the Browse button to open a file dialog. Navigate to the folder containing the template you want to use, select it, and click **Open**.

4. The field in the lower portion of the **Select Layout as Sheet Template** dialog lists all the layouts included in the template file. Select the one you want to use, and then click **OK**.

5. In the **Sheet Set Properties** dialog, leave the **Prompt for template** set to **No** so that the program automatically uses this template file whenever you create a new sheet in this sheet set. (**Note:** If this is set to Yes, the program will prompt you to select a template whenever you create a new sheet in the sheet set.)

6. Click **OK**.

7. When the program asks if you want to apply changes to all nested subsets, select **Apply changes to nested subsets**.

Note: When you apply changes to all nested subsets, then the sheet creation properties will be the same for the entire sheet set, regardless of where you create new sheets within the sheet list. If you do not apply changes to all nested subsets, you may get different sheet creation behavior, depending on in which subset you create a new sheet.

To create a new sheet using the Sheet Set Manager:
1. In the **Sheet Set Manager**, right-click the sheet set title and choose **New Sheet…**.

2. In the **New Sheet** dialog, in the **Number** field, enter the sheet number.

3. In the **Sheet title** field, enter the sheet title.

   Note that as you enter the number and title, the program automatically enters that same information for the file name, but you can then name the file anything you want. It is a good practice to avoid including sheet numbers in the file name to avoid future confusion, because if you renumber the sheets in the sheet set, the sheet number and the file name will be different.

4. The new sheet has been added to the bottom of the sheet set. Drag and drop it into the proper location within the sheet set.
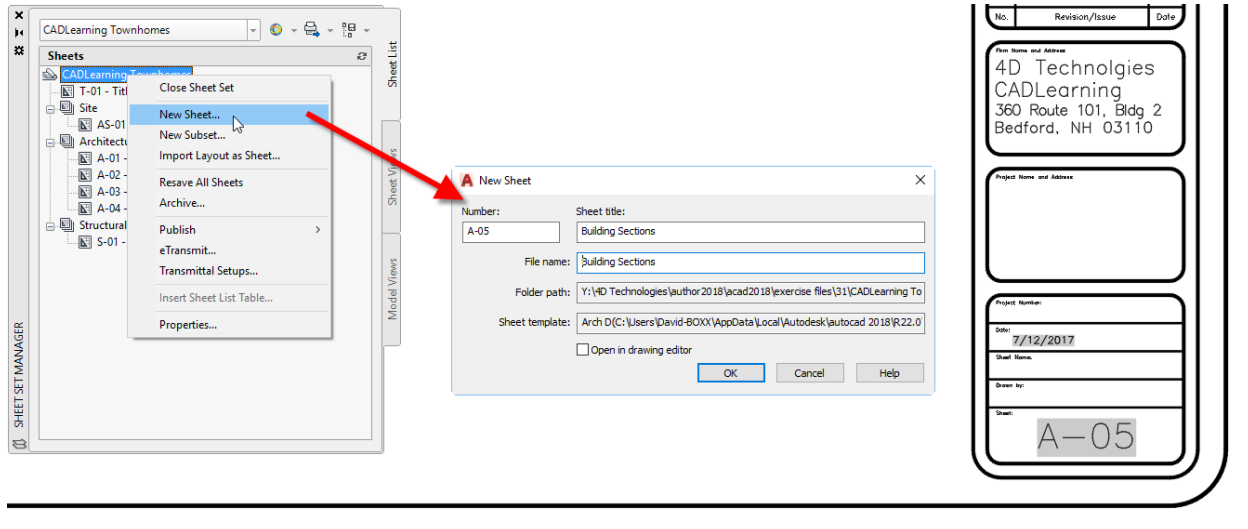
As you have seen, once you establish the sheet creation properties, you can easily add new sheets to a sheet set.

Automating Title Block Data

Once you have included standard and custom properties within a sheet set, you can significantly automate the process of updating title block information by using fields to include sheet set data in title blocks. As sheet and sheet set information changes, the data in the title block will always be current.

While there are many ways to create a title block, the most common method is to use a block definition with attributes for the various title block data and include that block on the layout of a drawing template file.

To ensure that you insert the proper sheet set fields, it is a good practice to create a new sheet in the sheet set, add fields to the block, remove the new sheet from the sheet set, and then save the new drawing over the old template file.

To create a new sheet to replace the template file:

1. In the **Sheet Set Manager**, in the sheet list, right-click the sheet title and choose **New Sheet…**.

2. In the **New Sheet** dialog, enter the sheet number and sheet name values for this temporary sheet. In the **Number** field, type "**SheetNo**" and in the **Sheet title** field, type "**Sheet name**". Then, click **OK**.

3. In the **Sheet Set Manager**, double-click the new sheet to open it.

   The title block is a block that has been inserted onto the layout tab. Since you need to add new attributes to the title block, you need to edit the block definition. The easiest way to do this is by using the Block Editor.

4. Select the title block, right-click, and choose **Block Editor** to open the title block in the Block Editor environment.

   When you zoom in to the lower-right corner of the title block, you can see that the DATA and SHEETNO attributes have already been defined and are functioning properly. You can double-click these attributes and then drill down into their properties to see how the default value was linked to a field.

   You are now ready to add new attributes for the project name and address, the project number, the sheet name, and the name of the person who drew the sheet.

5. On the **Insert** ribbon, in the **Block Definition** panel, click **Define Attributes**.

6. In the **Attribute Definition** dialog, define a new attribute.

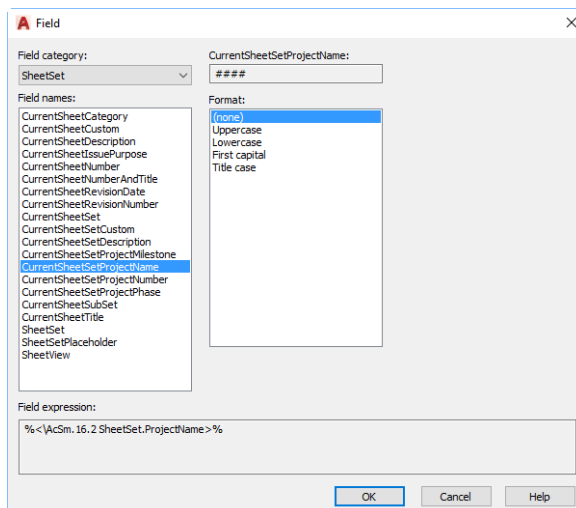 | | |
   |---------------:|:------------------|
   | **Tag:** | Project_Name |
   | **Prompt:** | Enter project name |

7. Click the **Insert Field** button to the right of the Default value field.
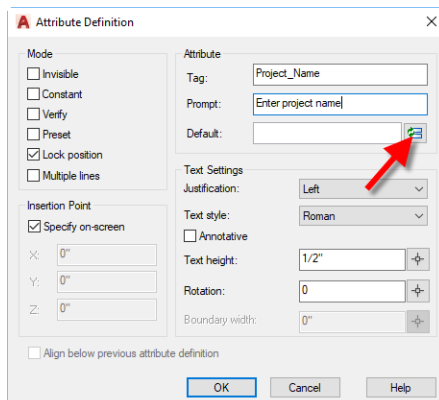
8. In the **Field** dialog, expand the **Field category** drop-down and choose **SheetSet**.

9. In the **Field names** list, select **CurrentSheetSetProjectName**, and then click **OK**.

10. Change the **Text height** to **1/8"** and then click **OK** to close the Attribute Definition dialog.

11. When the program prompts you to specify the start point, track down from the insertion point of the text that reads, "Project Name and Address," and then click to place the attribute.

12. Repeat steps 5 through 11 to define additional attributes with fields linked to the following tags, and place each attribute in the proper location in the title block.

- **Tag:** Project_Address_1

Field name:	CurrentSheetSetCustom
Custom property name:	Project_Address_1
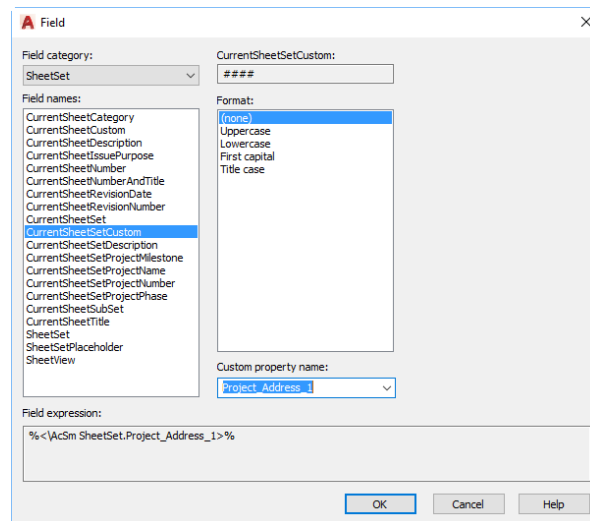
- **Tag:** Project_Address_2

Field name:	CurrentSheetSetCustom
Custom property name:	Project_Address_2

- **Tag:** Project_Number

Field name:	CurrentSheetSetProjectNumber

- **Tag:** Sheet_Name

Field name:	CurrentSheetTitle

- **Tag:** Drawn_By

Field name:	CurrentSheetCustom
Custom property name:	Drawn_By

13. In the ribbon, click **Close Block Editor** and save the changes to the block.

Although you have changed the block definition, those changes do not yet appear in the instance of the block on the layout.

14. On the **Insert** ribbon, expand the **Block Definition** panel and choose **Synchronize**.

15. Choose the **Select** option, select the block, and then choose **Yes** to update the block.

    As soon as you do, you see the new information in the title block. Some of the information—such as the project name and project number—is already being read from the sheet set properties, while other information—such as the address—is showing default values. But as long as you no longer see any hashmarks, all of the values were linked properly.

    Now that you have updated the title block data, you must remove the title block drawing from the sheet set and use the new drawing to replace the old sheet creation template.

16. In the **Sheet Set Manager**, right-click the sheet you have been working on, choose **Remove Sheet**, and confirm that you really want to remove the sheet.

    The drawing is still open, but it no longer belongs to the sheet set.

17. In the **Quick Access Toolbar**, click **Save As…**.

18. In the **Save Drawing As** dialog, expand the **Files of type** drop-down and choose **Drawing Template (*.dwt)**.

19. Navigate to the folder containing the template used by the sheet set, select the existing template file, and then click **Save**. When the program asks if you want to replace the existing file, click **Yes**.

20. If you see a Template Options dialog, select **Save all layers as unreconciled** and click **OK**.

Now that you have replaced the template with the new version, any new sheets that you create will automatically include the new fields, which are linked to the sheet set properties.

As you have seen, once you add sheet set data to the drawing template, any new sheets you create will automatically use that data. But for any sheets that were in the sheet set before you updated the drawing template, you will need to erase the old title sheet block, purge the block definition from the drawing, and then insert the new title block.

### Updating Title Block Data in Existing Sheets

Once title block data has been added to the template, any new sheets you create will automatically include the appropriate fields. But any sheets that were created before you revised the sheet creation template will need to be updated manually. To update those existing sheets, you simply need to redefine the title block definition and then synchronize the attributes. You will not need to reenter any attribute data, however, because it is already stored in the sheet set and will therefore automatically populate the title block fields.

NOTE: In versions prior to 2020, to update those existing sheets, you would need to erase and purge the old title block definition from those drawings and then insert the new title block using DesignCenter, which can be a tedious, multi-step process. But the new block insertion tools eliminate many of those steps.

To update an existing sheet:
1. In the **Sheet Set Manager**, double-click the sheet to open it in the drawing editor.

2. On the **Insert** ribbon, in the **Block** panel, expand the **Insert** split-button and select **Blocks from Other Drawings…**.

3. In the **Select Drawing File** dialog, expand the **Files of type** drop-down and select **Drawing Template (*.dwt)**.

4. Navigate to the folder in which you saved the drawing template file used by the sheet set, select it, and click **Open**.

5. In the **BLOCKS** palette, right-click the **Title Block**, and select **Redefine Only**.
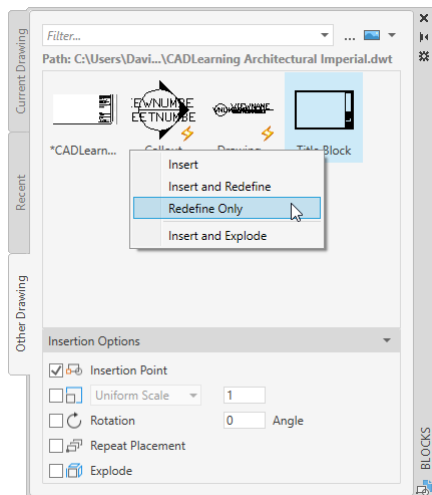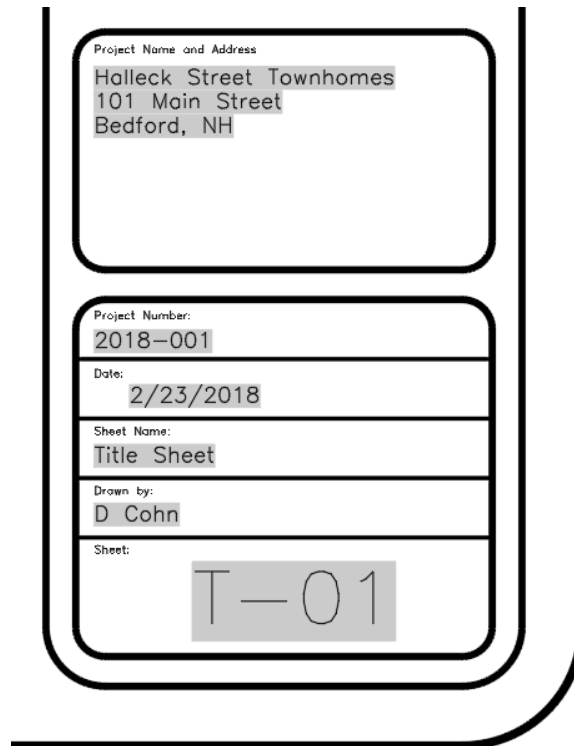

6. On the **Insert** ribbon, expand the **Block Definition** panel and choose **Synchronize**.

7. Choose the **Select** option, select the block, and then choose **Yes** to update the block.

   Now you are ready to enter the actual sheet set data for the project address and the name of the person who drew each sheet.

8. In the **Sheet Set Manager**, right-click the sheet set title and choose **Properties…**.

9. In the **Sheet Set Properties** dialog, under **Sheet Set Custom Properties**, click in the **Project_Address_1** field and enter the actual street address for the project (such as "101 Main Street").

10. Click the **Project_Address_2** field and enter the actual city and state for the project (such as "Bedford, NH").

11. Click **OK** to close the dialog.

12. In the **Sheet Set Manager**, right-click one of the sheets (such as the Title Sheet) and choose **Properties…**.

13. In the **Sheet Properties** dialog, click in the **Sheet Title** field and enter the actual sheet title (such as "Title Page").

14. Under **Sheet Custom Properties**, click in the **Drawn_By** field and enter the first initial and last name of the person who created the drawing (such as "D Cohn").

15. Click **OK** to close the dialog.

Although you have changed many of the sheet set properties, those changes will not appear until the drawing has been regenerated.

16. Type "**RE**" and press **ENTER**.

You can now see that all the information in the title block has been updated. It is now being filled in automatically based on the sheet set data.

17. Repeat steps 5 through 16 for each of the other sheets in the sheet set that had been added to the sheet set *__before__* you added the additional attributes to the title block.

Again, remember that any new sheets you create in the sheet set will automatically use the revised template that includes the updated title block. But for any sheets in the sheet set that were created before the sheet set data was added to the drawing template, you will need to repeat these steps of erasing the old title block, purging the old block definition from the drawing, and then inserting the new block from the drawing template file.

Plotting Using Any Page Setup

Suppose you need to plot a 50-sheet set of drawings. And suppose those drawings were each saved to plot to E-size paper on a large, roll-fed plotter, but now your boss has asked you to print them all on letter-size sheets using a laser printer.

Using traditional methods, you would need to open each drawing, select the layout, choose the Plot command, select the device, set the paper size, set the plot area, set the scale, and send it to the printer. And then you would have to repeat those steps 49 more times.

The Sheet Set Manager enables you to use named page setups to quickly plot an entire sheet set—or any selected sheets within it—to any page setup configuration. When you create a new sheet set, the program uses a default template file for the named page setups. If you already have a template file for creating new drawings, you can use that same template file to store your named page setups.
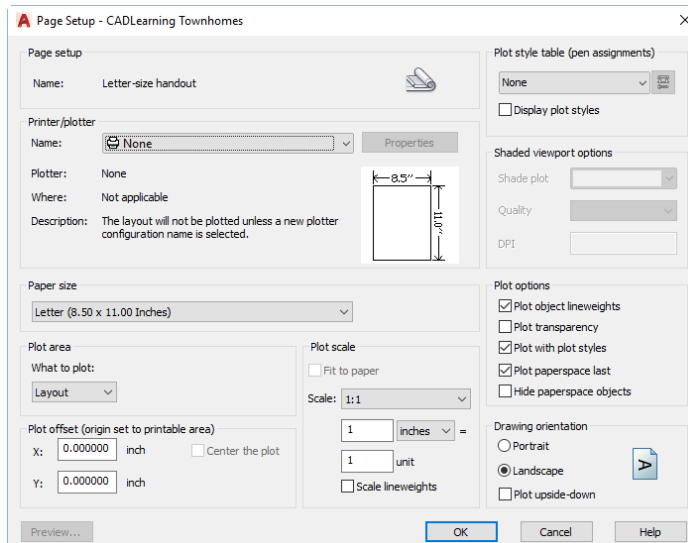
To create a named page setup:

1. Right-click anywhere in the sheet list and choose **Publish > Manage Page Setups…**.

2. In the **Page Setup Manager** dialog, you see a list of existing page setups. Click **New…**.

3. In the **New Page Setup** dialog, in the **New page setup name** field, enter the name for the new page setup (such as "Letter-size handout").

4. In the **Start with** list, choose **<None>** and then click **OK**.
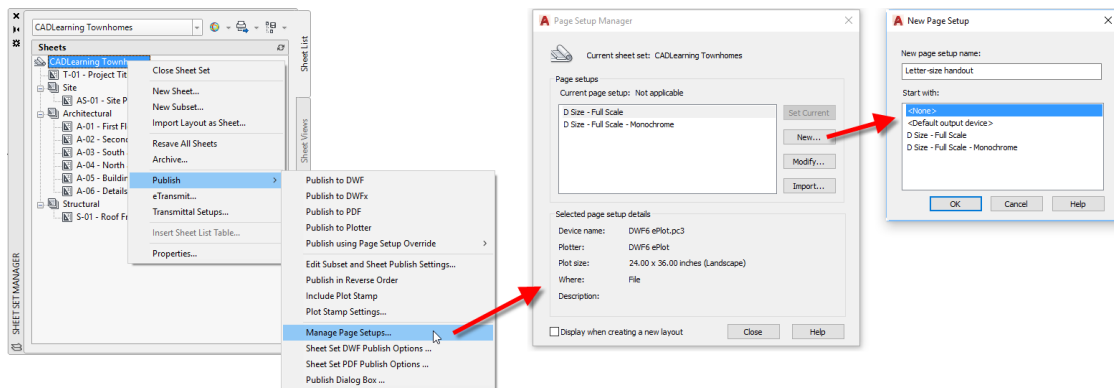
5. In the **Page Setup** dialog, specify the device and other page setup options.

   For example, to print to your laser printer, in the **Printer/plotter** group box, you would expand the **Name** drop-down and select your laser printer.

6. In the **Paper size** group box, choose the paper size—such as **ANSI A (11.00x8.50)**.

7. In the **Plot Area** group box, expand the **What to plot** drop-down and choose **Extents**.

8. In the **Plot scale** group box, choose **Fit to paper**.

   ☞ **Remember:** When creating your own page setups, you would specify the device and other page setup options appropriate for your situation.

9. When everything is set properly, click **OK**.

The program returns to the Page Setup Manager. You can repeat steps 2 through 9 to create another new page setup.

10. Click **Close** to close the Page Setup Manager.

Each named page setup is automatically written to the template file. This is one of the few sheet set functions that might write information to an existing file without you knowing it. The only other time this happens is when the program writes "hints" to the drawings in a sheet set so that they recognize that they belong to a specific sheet set.

Now that the template file includes named page setups, you can easily plot your sheet set to any configuration that is stored in the named page setups.

To plot using a named page setup:

1. In the **Sheet Set Manager**, right-click the sheet set title, or you could select any combination of sheets that you want to plot.

2. In the shortcut menu, choose **Publish > Publish Using Page Setup Override**.

3. Select the desired page setup from the list.
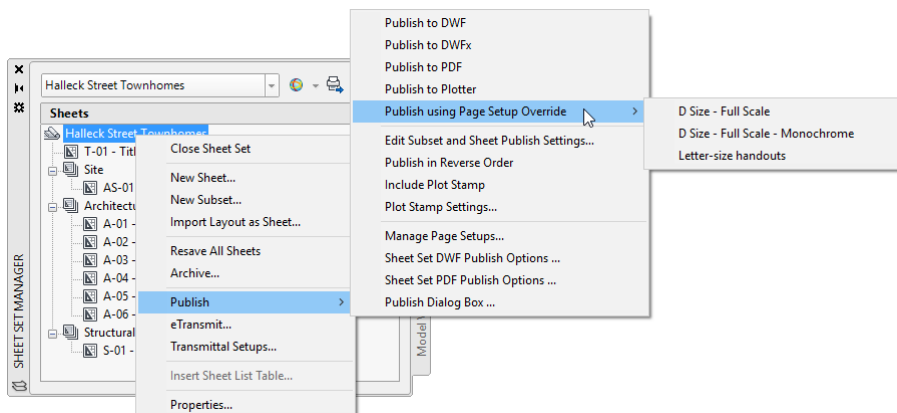
Creating Sheet Views

When you create sheets using traditional tools, you most likely create a drawing using a template and then attach external references of your model, create viewports on the layouts, set the viewport scale, and insert a view label to describe that view or detail. These same concepts apply when using sheet sets, but the process is automated.

The first step is to add the folders containing the drawings you want to reference as a sheet set property, so that you can easily access those drawings from within the Sheet Set Manager.

To add folders containing model views:

1. In the **Sheet Set Manager**, right-click the sheet set title and choose **Properties…**.

2. In the **Sheet Set Properties** dialog, click in the **Model view** field to make it active, and then click the adjacent button.
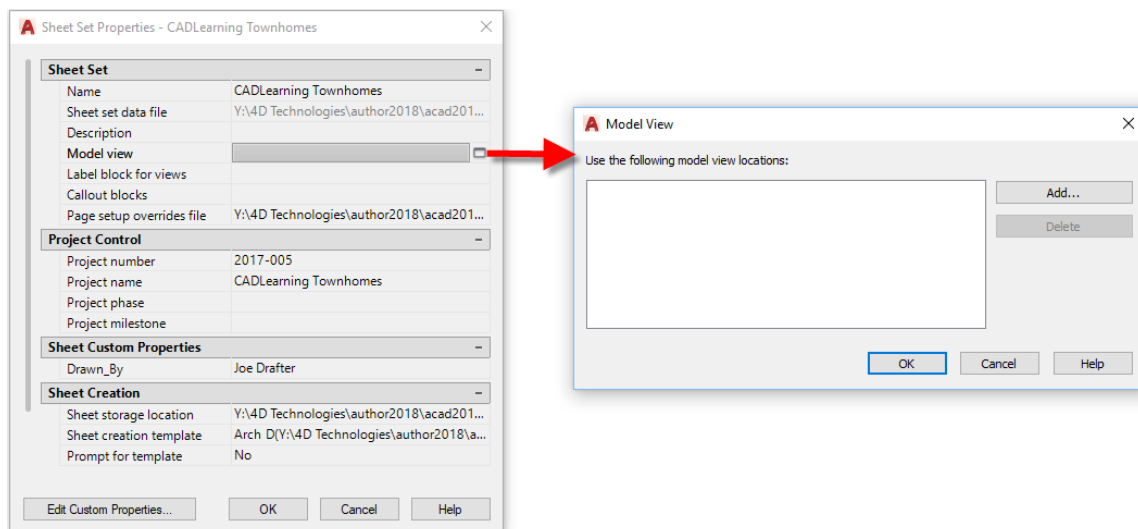

3. In the **Model View** dialog, click **Add…**.

4. Navigate to the folder containing the drawings you want to reference, and then click **OK**.

5. Click **OK** to close the Sheet Set Properties dialog.

Now you are ready to use the Sheet Set Manager to add views onto your sheets. Rather than manually attaching an xref and then creating and scaling a model space viewport, you can simply drag a resource drawing onto a sheet.

To add a view onto a sheet:

1. In the **Sheet Set Manager**, on the **Sheet List** tab, double-click to open the sheet onto which you want to add the view.

2. Switch to the **Model Views** tab.

3. In the **Locations** list, expand the folder you just added to see the drawing files that can be attached as xrefs.

4. Select the drawing that you want to add and drag it onto the sheet.
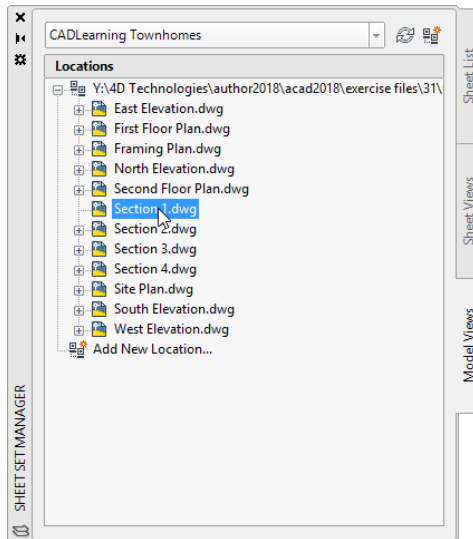
The program automatically determines an appropriate scale based on the size of the drawing view and the layout.

5. To select a different scale, right-click and select from a list of scales.

6. Click to complete the insertion. As soon as you do, the view is placed on the sheet.

Adding View Labels

When you create sheet views, you probably want those views to be labeled. Using traditional methods, you would likely insert a block that uses attributes to display the view number, title, and scale. While you can continue to insert your view label block just as you have always done, you can save some steps by leveraging the power of sheet sets. To do this, you simply need to assign your view label block as a property in the sheet set.

To assign a view label block:
1. In the **Sheet Set Manager**, right-click the sheet set title and choose **Properties…**.

2. In the **Sheet Set Properties** dialog, click in the **Label block for views** field to make it active, and then click the adjacent button.

3. In the **Select Block** dialog, click the button to the right of the name field.

4. Navigate to the file that contains your standard view label block, select that file, and click **Open**.

5. In the **Select Block** dialog, do one of the following:
   - To use the entire drawing as the view label block, choose **Select the drawing file as a block**.
   - To use an individual block within the drawing as the view label block, select **Choose blocks in the drawing file**, and then select the view label block from the list of available blocks.

6. Click **OK** to close the Select Block dialog.
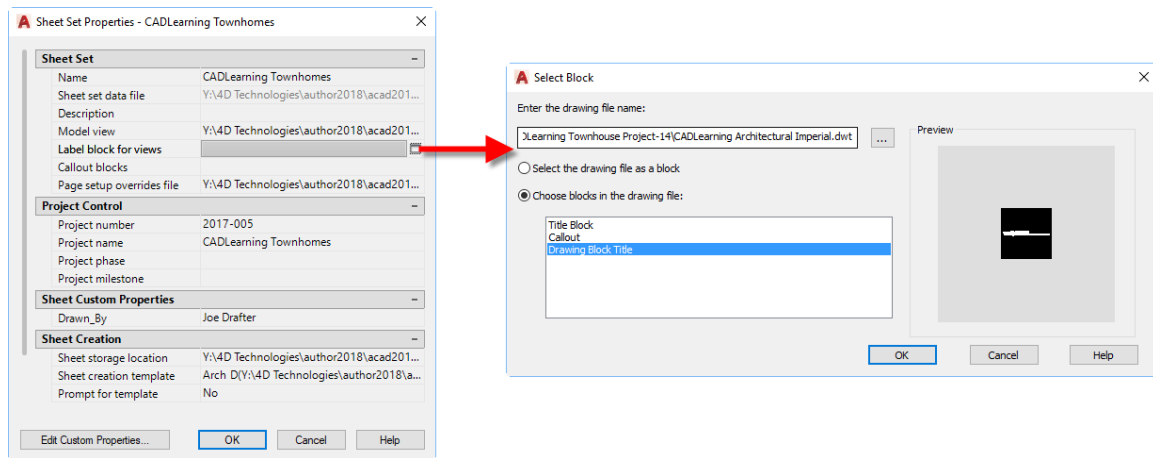
7. Click **OK** to close the Sheet Set Properties dialog.

Now, when you create new sheet views using the Model Views tab, the program will automatically insert the view label block for you.

When you add the new view, the view number will not be filled in, however, because a number has not yet been assigned to the view.

To add the view number:

1. In the **Sheet Set Manager**, switch to the **Sheet Views** tab.

2. Right-click the view you inserted and choose **Rename & Renumber**.

3. In the **Rename & Renumber Views** dialog, click in the **Number** field and enter the view number.

   Note that the View Title has already been assigned based on the drawing name, but you could change that information here as well.

4. Click **OK** to close the dialog.

5. Regenerate the drawing (by typing "**RE**") so that the view number becomes visible.

☞ **Important:** Do not edit the view label attribute values manually! Attributes in the view label block use fields, which will be filled in automatically using the sheet set data. If you need to change the view number, use the tools in the Sheet Set Manager.

Automating View Label Data

By now, you are probably wondering how the view label block could be automatically filled in based on the sheet set data and viewport scale. This happened because the block definition included the necessary sheet set data. To see how this was accomplished, open the drawing containing the block, and then open that block in the Block Editor.
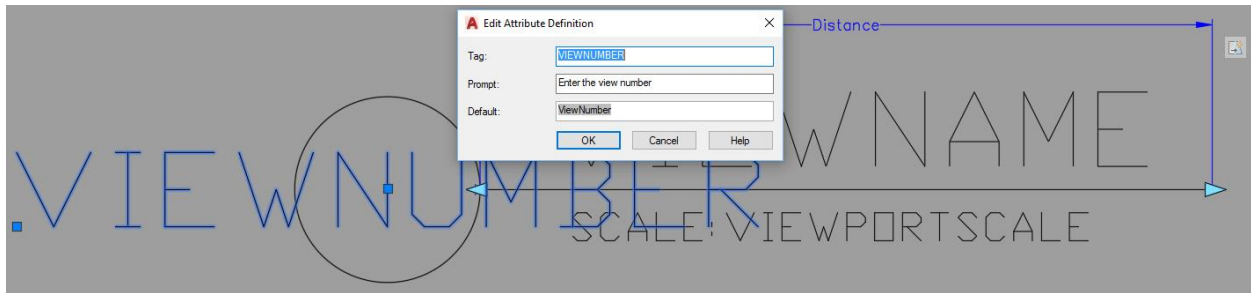
The view label block includes three attributes, which in turn use fields linked to sheet set properties. Double-click the **VIEWNUMBER** attribute to open the **Edit Attribute Definition** dialog. Here, you can see that the Tag, Prompt, and Default values have already been filled in. The Tag and Prompt are defined as you would for any attribute. But to automatically fill in the value based on sheet set data, the default value must point to the proper sheet set field.
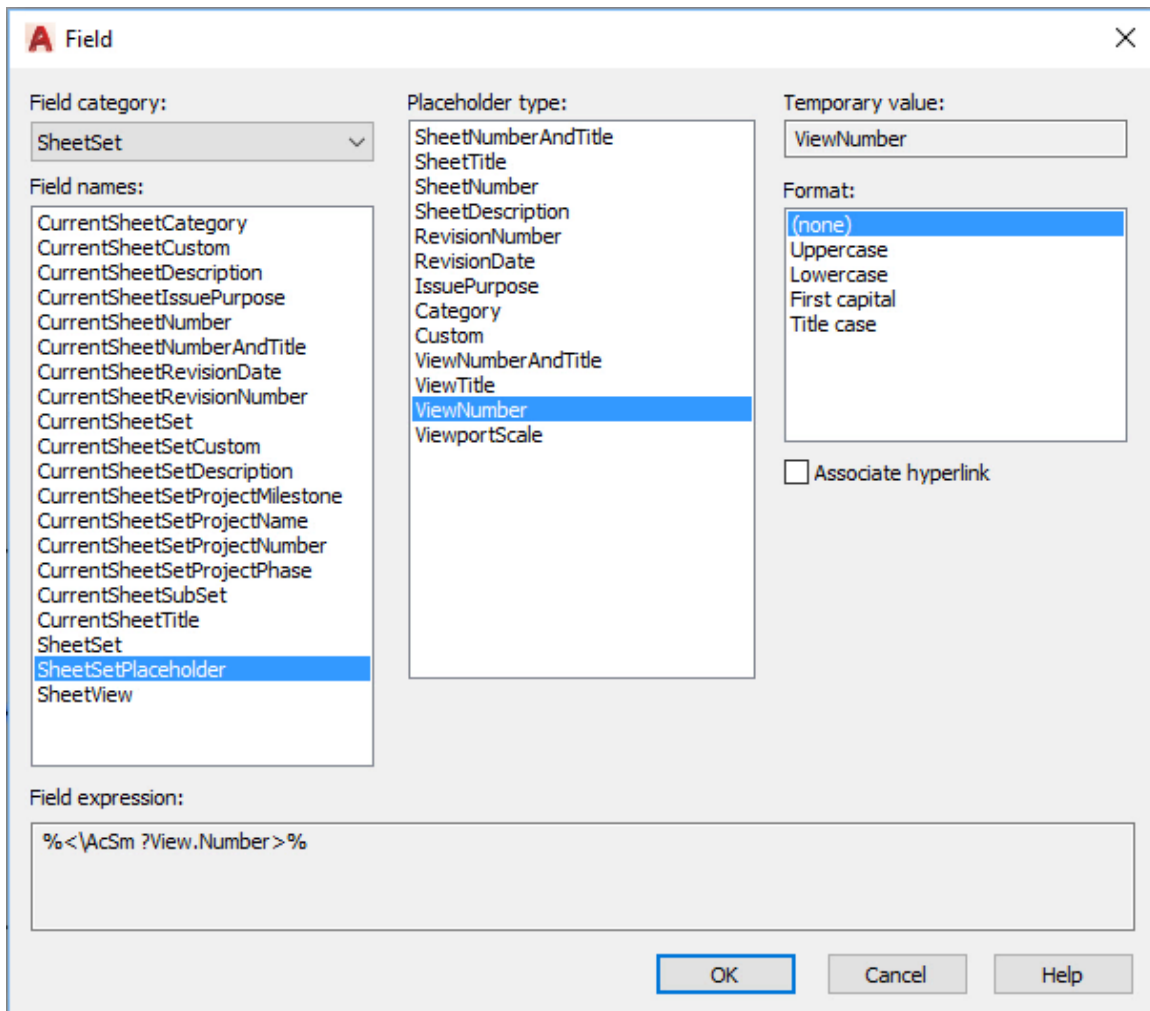
When you double-click the default value, the program opens the **Field** dialog. In the **Field names** list, the **SheetSetPlaceholder** is selected, and in the **Placeholder type** list, the field is

set to the **ViewNumber**. Using the SheetSetPlaceholder field in a block enables you to define block attributes for fields that are not associated with a specific sheet or sheet set. Click **Cancel** to close the Field dialog, and then click **Cancel** to close the Edit Attribute Definition dialog.

You can repeat this to see the fields associated with the default values for the other attributes in this block. The three attributes have already been assigned as follows:

Attribute	Default value/Field name	Placeholder type	Format
VIEWNUMBER	SheetSetPlaceholder	ViewNumber	(none)
VIEWNAME	SheetSetPlaceholder	ViewTitle	(none)
VIEWPORTSCALE	SheetSetPlaceholder	ViewportScale	#" = 1'-0"

Since the blocks in the template are already defined, be sure not to make any changes to these blocks or their attributes.

There is one other block property that needs to be set properly. Select one of the attributes, and then open the **Properties** palette. Under **Misc**, make sure that **Preset** is set to **Yes**. Since the sheet set field will be entering the attribute value for you, you do not want the program to prompt you for the information as it would if you were using traditional methods. Setting the Preset property to Yes will prevent the program from asking for a value when the block is inserted.
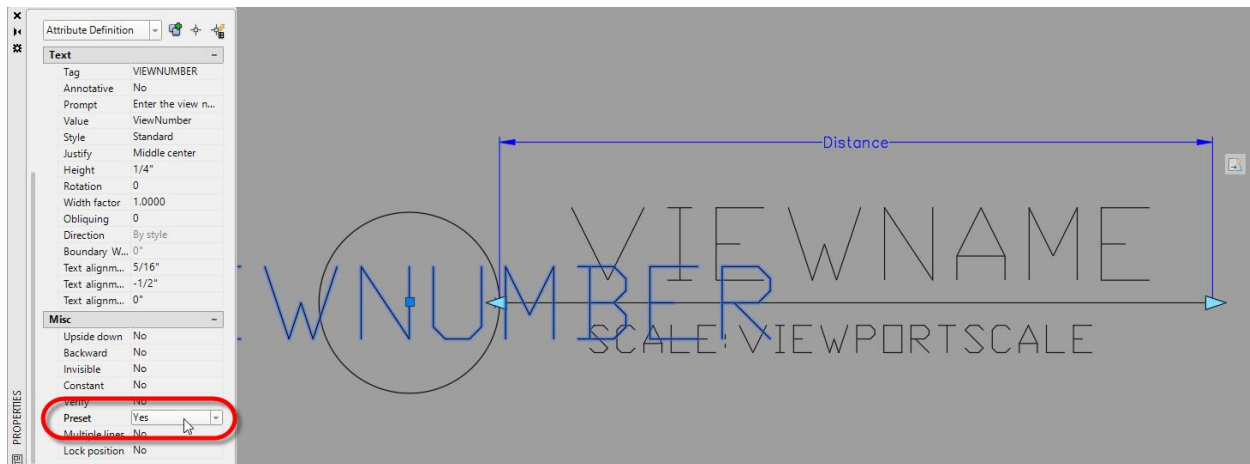
Again, be sure not to change any of these values in the sample template. But now that you understand how the attributes are linked to the proper fields, you can create your own custom view label blocks.

Placing Additional View Label Blocks

Once you have assigned the Label Block for Views property in your sheet set, the program will automatically insert a label block when you create a view from the Model Views tab. But what about views that were already in the sheet set before you added this additional level of sheet set automation? Those existing views do not have labels. Well, have no fear. Thanks to the power of sheet sets, you can easily insert view label blocks linked to those existing views.

To place view label blocks for unlabeled views:

1. In the **Sheet Set Manager**, open the sheet containing a view that does not yet have a label.

2. Switch to the **Sheet Views** tab.

   This tab displays all the sheet/layout views.

3. In the list, right-click the view that does not yet have a label and choose **Place View Label Block**. The program prompts you to specify the insertion point.
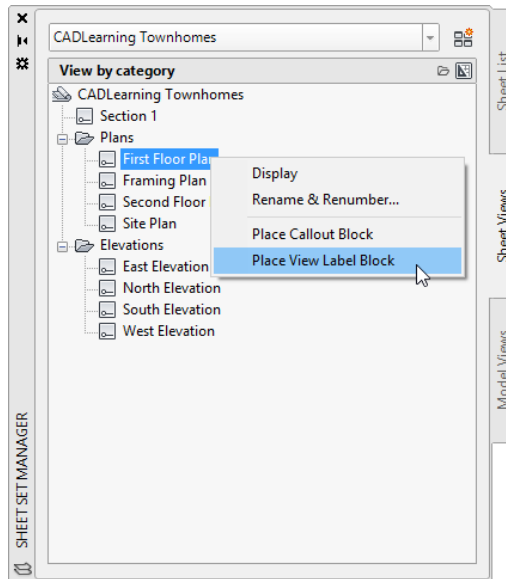
4. Click to place the view label block below the view.

In the view label block, the view name and scale have been filled in automatically. But the view number is not yet filled in because the view number has not yet been assigned.

To add the view number:

1. In the **Sheet Set Manager**, switch to the **Sheet Views** tab.

2. Right-click the view whose label you inserted and choose **Rename & Renumber**.

3. In the **Rename & Renumber Views** dialog, click in the **Number** field and enter the view number.

   Note that the View Title has already been assigned based on the drawing name, but you could change that information here as well.

4. Click **OK** to close the dialog.

5. Regenerate the drawing (by typing "**RE**") so that the view number becomes visible.

☞ **Important:** <u>Do not edit the view label attribute values manually!</u> Attributes in the view label block use fields, which will be filled in automatically using the sheet set data. If you need to change the view number, use the tools in the Sheet Set Manager.

Automating Callout Data

Most sets of documents contain information that is interrelated. For example, a callout on a sheet might refer to a view on a different sheet. If you use traditional methods, you can manually enter these references, but that process is tedious and error-prone. Instead, when you leverage the power of sheet sets, callout data can be automated as well. In addition, hyperlinks enable you to quickly open the sheet that is referenced by the callout and zoom to the appropriate view.

The process for automating callout data is very similar to automating block label data. But unlike the view label block, you can assign multiple callout blocks to your sheet set. Each block you use as a callout block will need to have its attributes adjusted so that they link to the appropriate fields. If you combine multiple callout blocks into a single dynamic block, however, you will only have to adjust the fields in that one dynamic block definition.

To see how this works, open the drawing containing the callout block, and then open that block in the Block Editor.
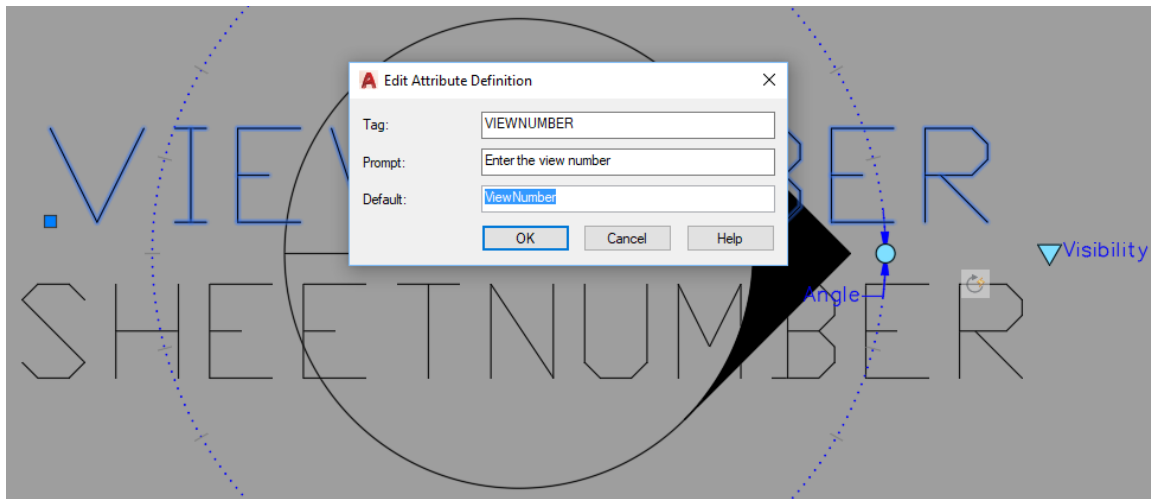

The block includes two attributes, which in turn use fields linked to sheet set properties.

The **VIEWNUMBER** attribute has its default value linked to a SheetSetPlaceholder field called **ViewNumber**. When you double-click the **Default** value, in the **Field** dialog, you can also see that **Associate hyperlink** is selected.

The **SHEETNUMBER** attribute has its default value linked to a SheetSetPlaceholder field called **SheetNumber**. **Associate hyperlink** is selected for this field as well.

Associating a hyperlink enables you to click on the callout block to open the associated sheet and zoom to that view.

In addition, for both attributes, in the **Properties** palette, the **Preset** property is set to **Yes**, so that the program will not ask for a value when the block is inserted.
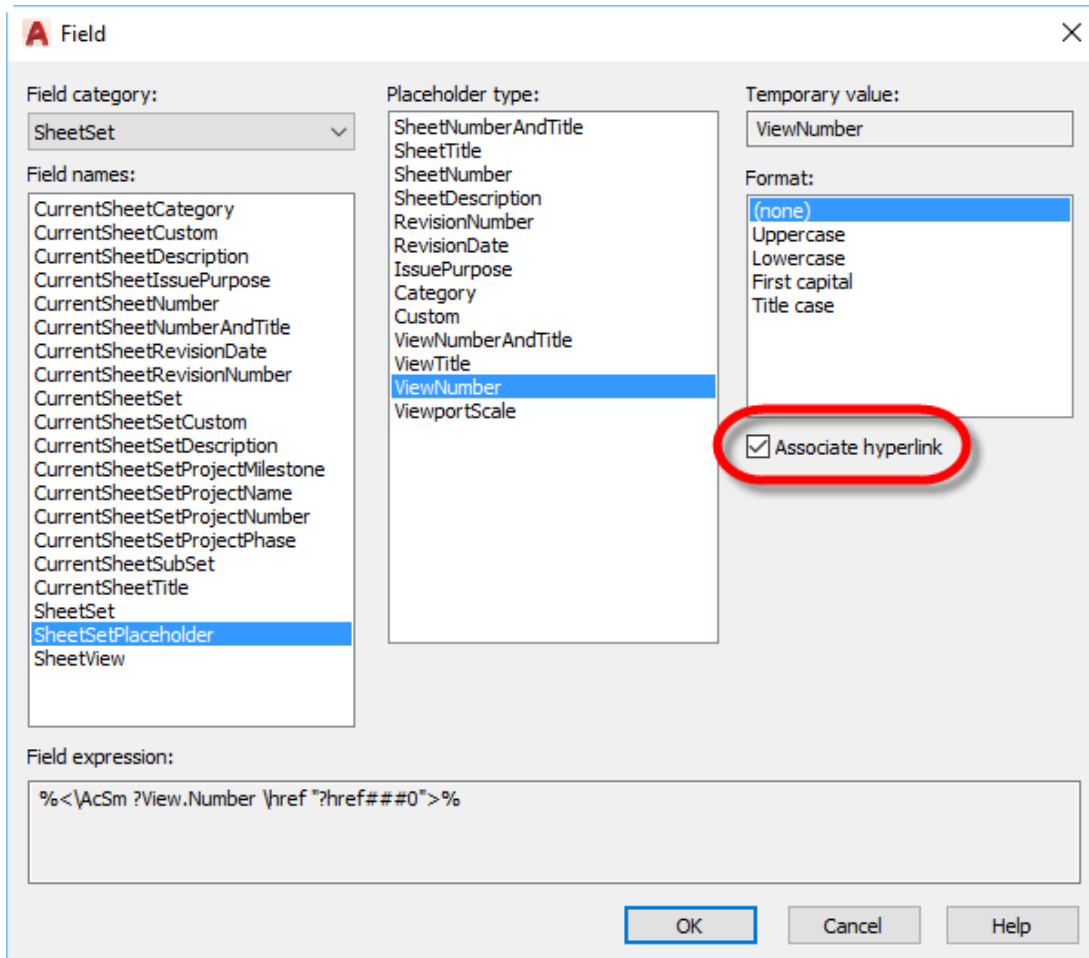
Now that you have seen how this block was created, close the drawing, making sure not to change any of these values.

To add the callout block to the sheet set:

1. In the **Sheet Set Manager**, right-click the sheet set title and choose **Properties…**.

2. In the **Sheet Set Properties** dialog, click in the **Callout blocks** field to make it active, and then click the adjacent button.

3. In the **List of Blocks** dialog, click **Add…**.

4. In the **Select Block** dialog, click the button to the right of the name field.

5. Navigate to the file that contains your callout block, select that file, and click **Open**.

6. In the **Select Block** dialog, do one of the following:
   - To use the entire drawing as the callout block, choose **Select the drawing file as a block**.
   - To use an individual block within the drawing as the callout block, select **Choose blocks in the drawing file**, and then select the callout block from the list of available blocks.

If you use multiple callout blocks, you can click Add… and then repeat steps 4 through 6 to add those additional blocks.

7. Click **OK** to close the Select Block dialog.

8. Click **OK** to close the Sheet Set Properties dialog.

Now you are ready to add callout blocks to your drawings.

To add a callout block:

1. In the **Sheet Set Manager**, on the **Sheet List** tab, double-click the sheet onto which you want to place the callout.

2. Switch to the **Sheet Views** tab.

   This tab displays all the sheet/layout views.

3. In the list, right-click the view for which you want to place a callout and choose **Place Callout Block**.
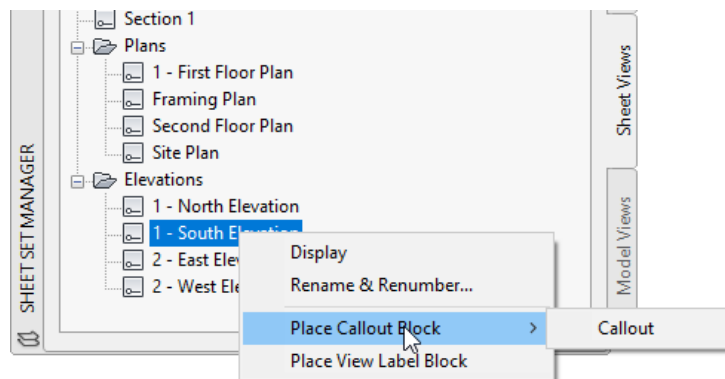
The first time you do this, if your sheet set includes multiple view categories, you may see a cascading menu option to **Select Blocks…**. If so, choose that option. In the **View Category** dialog, select the callout blocks that you want to be available and then click **OK**. Then, right-click the view again. Now, the cascading menu displays the blocks you had selected.

4. Choose the callout block. The program prompts you to specify the insertion point.

5. Click to place the block in the desired location.

Since the block is a dynamic block, when you select it, you see several grips. You can expand the visibility grip to choose the desired type of callout, and use the round grip to rotate the arrow so that it is pointing in the correct direction.

Since the Sheet Set Manager is keeping track of the view number and sheet number, if you have already assigned these values, the information in the callout is filled in automatically.

When you hover the cursor over the view number or sheet number in the callout, you see a hyperlink icon. When you press **CTRL** and click on the sheet number, the program automatically opens the appropriate sheet. When you press **CTRL** and click on the view number, the program opens the appropriate sheet and zooms into the view.

Conclusion

Sheet sets offer a great deal of power. You don't need to implement all the sheet set automation features at once. But, when you do leverage the full power of sheet sets, you will have a completely coordinated set of documents.

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