

# 6 Sheet Set Manager Strategies for Success

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- Class ID: BES220360 – November 13, 2018 – 8:00am to 9:00am



# Class Summary

Over the past 7 years, hundreds of Associated Engineering Production Staff have been using AutoCAD software's Sheet Set Manager (SSM) to effectively coordinate project drawing packages.

## SSM Highlights....

- SSM can greatly impact productivity while reducing input (repetition)
- SSM can reduce project budgets and schedules
- SSM can be customized for any company or client (project) standard
- SSM can reduce user frustration.... yes, Sheet Sets can be “easy to use”



# Class Objectives

By the end of today's class, you will have obtained a better understanding and ability to:

- Create Sheet Sets with a solid understanding of their full functionality
- Transfer and modify existing sheet borders for use with Sheet Set Manager
- Use Sheet Set Manager to pre-configure project and/or company CAD standards requirements
- Avoid pitfalls and limitations by capitalizing on best practices for developing Sheet Set Manager content

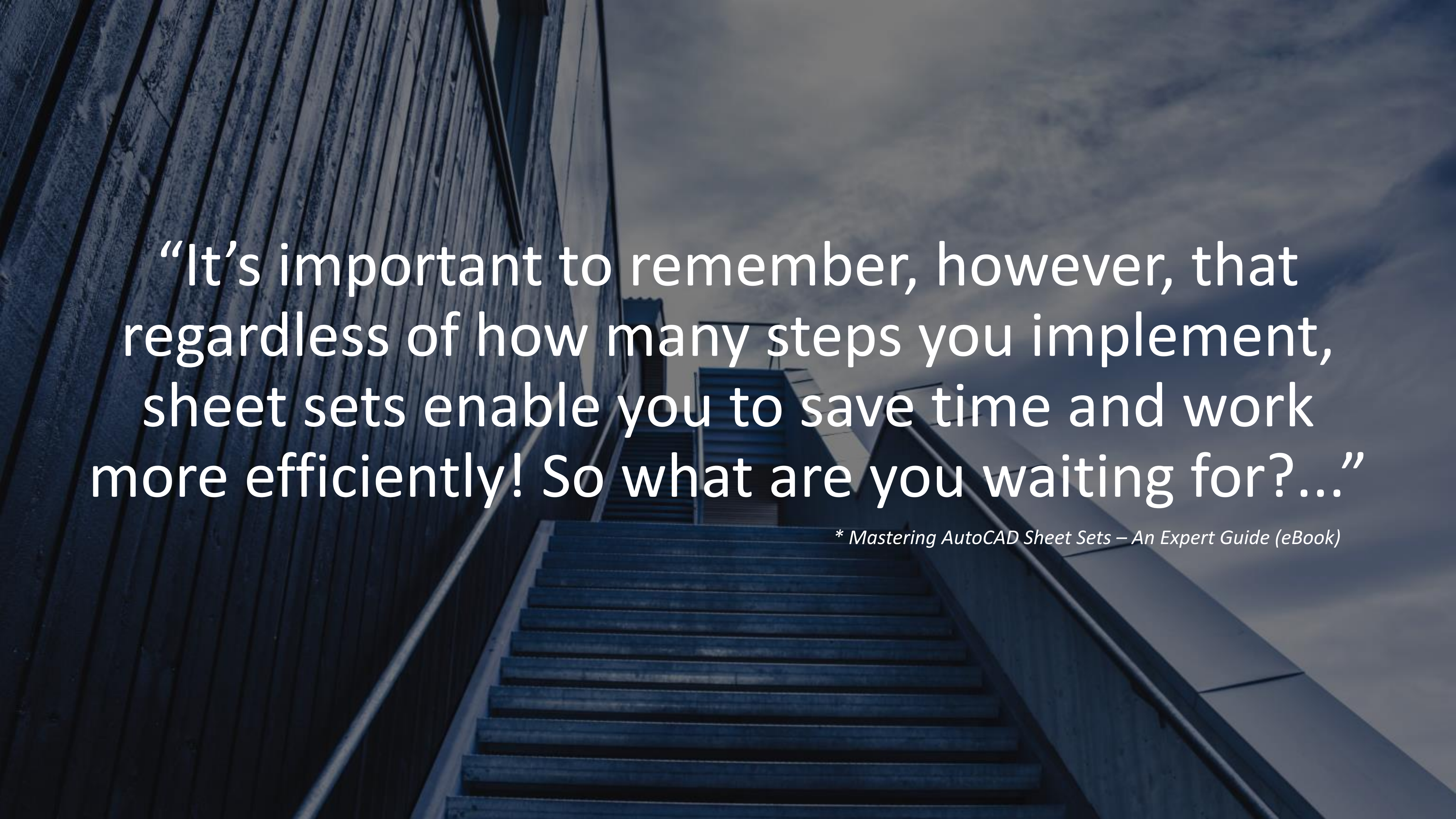




## About the speaker

### Chad Franklin, C. Tech.

- CAD Coordinator at Associated Engineering
- 25 years experience with Autodesk Products
- Autodesk Certified Professional (AutoCAD)
- Autodesk Beta and Customer Councils Member
- Autodesk University Speaker (2017, 2018)
- Autodesk University Speaker Mentorship Program (Mentor)
- Background: Civil Infrastructure / Transportation
- AutoCAD and CAD Management Blog: theCADcafé



“It’s important to remember, however, that regardless of how many steps you implement, sheet sets enable you to save time and work more efficiently! So what are you waiting for?...”

*\* Mastering AutoCAD Sheet Sets – An Expert Guide (eBook)*



# What is Sheet Set Manager?

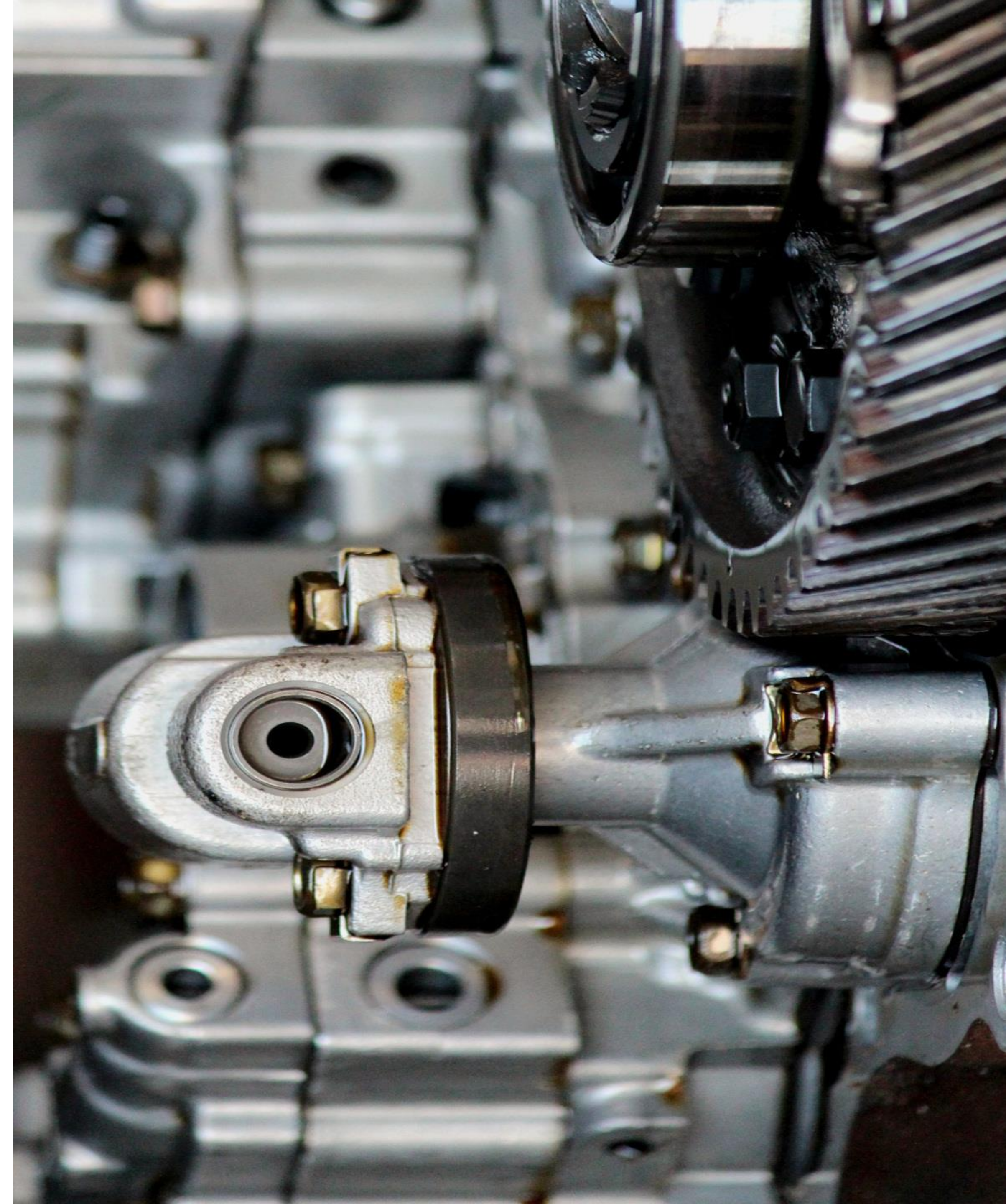
**Sheet Set Manager was first introduced in AutoCAD 2005.....**

- Provides a wealth of functionality and productivity solutions within AutoCAD (and AutoCAD-based) software
- Manage and organize all drawings within a project from a single 'panel' in AutoCAD
- Publishing and Archiving options

# How does Sheet Set Manager (aka SSM) work?...

SSM works by “linking” Sheet Border (and Title Block) information, using “fields” to a database (called a DST file)....

- All information contained within a fielded attribute is stored and managed within the DST file....
  - Information is ‘referenced’ into Sheet Set drawings, rather than stored in individual drawing files
- All updates are completed using the SSM (via Properties)





# Sheet Set Manager at Associated Engineering

For the past 7 years, the majority of our engineering projects leverage AutoCAD's Sheet Set Manager.....

- Background of Sheet Set Manager at Associated Engineering
- Implementation, Training and Support Challenges



GLOBAL PERSPECTIVE.  
LOCAL FOCUS.





Sheet Set Strategy #1  
Templates, Templates, Templates!!!

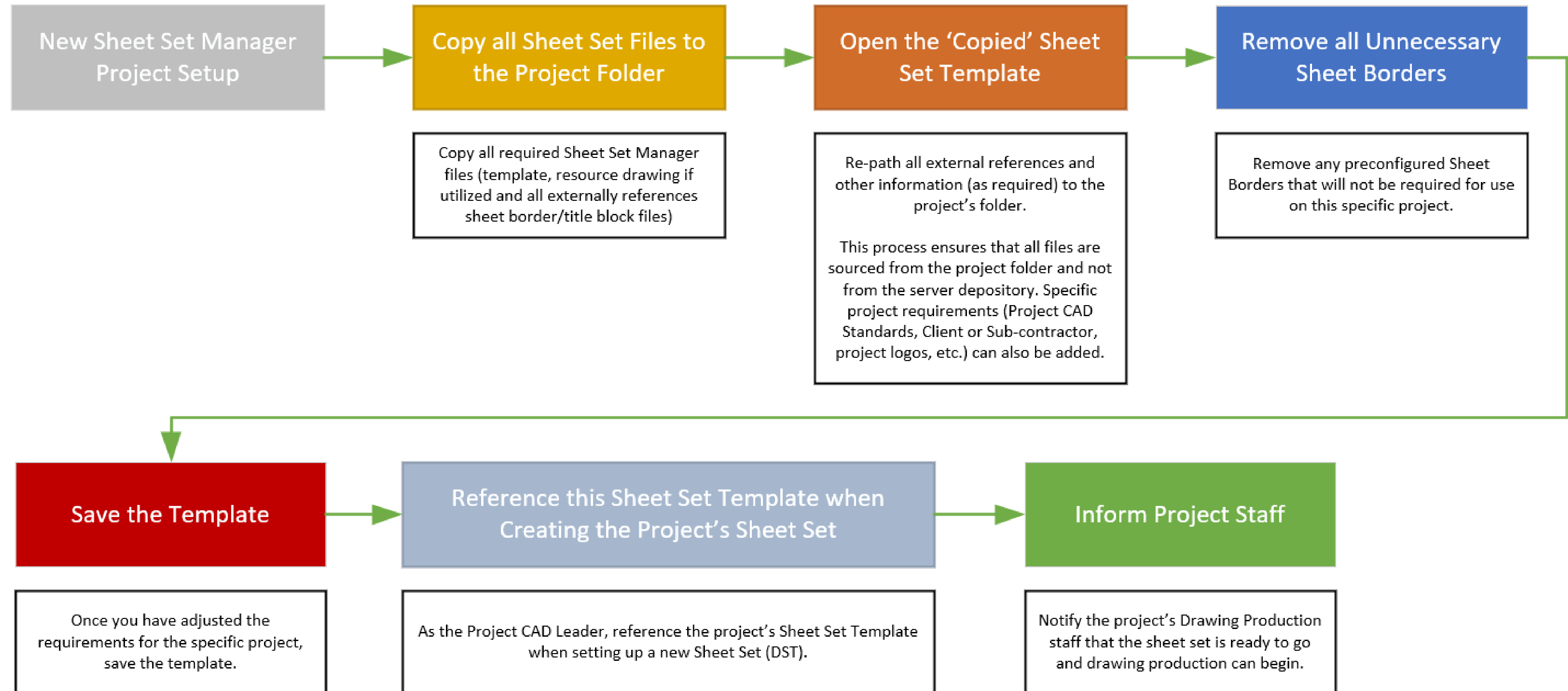
# Templates are user-friendly...

Using Templates makes Sheet Set Manager 'user-friendly'...

- Starting Point/Resource for New Projects...
  - Reference when setting up a new Sheet Set project
- **Preconfigure EVERYTHING!!!**
  - All Sheet Border Requirements
  - All Printing Requirements
  - All Drawing Variable Adjustments (i.e.: Units)
  - CAD Standards.....
- New Sheet Set Project Workflow (*Next Slide*)



# New Sheet Set Project Workflow





Sheet Set Strategy #2  
Use Custom Fields!!!



# Why use Custom Fields?...

**Provides flexibility for all required attributes/textual information contained within your Sheet Borders (and Title Blocks)...**

- What 'Sheet Set' specific fields are available?
- What is the difference between 'SheetCustom' and 'SheetSetCustom' fields?
- Best Practice = Use a Field Naming and Numbering Convention



Sheet Set Strategy #3  
Standardize the DST!!!

# Why Standardize the DST?...

Using a single 'standard' DST for and requirements is highly recommended...

- The same DST file is used for all Sheet Set Borders
- All 'custom fields' are included in the DST file
- Single file – removes confusion on which DST to use
- Preassign ALT+0160 to "Blank" fields



A photograph of a workspace on a wooden desk. In the background, a silver laptop is open, showing its keyboard and trackpad. In the foreground, a spiral-bound notebook with a grid pattern is open. A black pen with 'PRECISE' and 'FINE' written on it lies on the notebook. Handwritten in black ink on the notebook is the text: 

Sheet Set Strategy #4  
Preconfigure Print (Plot) Settings!!!



## Preconfigured all 'required' Print (Plot) Settings...

Keep it simple, provide all output requirements...

- Preconfigure all printing requirements (drivers, color tables, paper sizes, file types, etc.) into your Sheet Set Template.
- Sheet Set Manager Workflow: Select Drawings → Select Output (Pick from List) → Finished with **NO ERRORS** – Use Overrides!



Sheet Set Strategy #5  
Sheet List Table Functionality!!!

# Sheet List Table Functionality

SSM provides the ability to query the DST file to create a “linked” Sheet List Table.....

- DST Custom Properties (i.e: fielded attributes) can be referenced to create a Table listing all drawings within the project.....
  - Table is “linked” to the DST file
  - Can be quickly updated (within one or two steps)
  - Customizable content





Sheet Set Strategy #6  
Performance and Workflows!!!



# Performance and Workflows

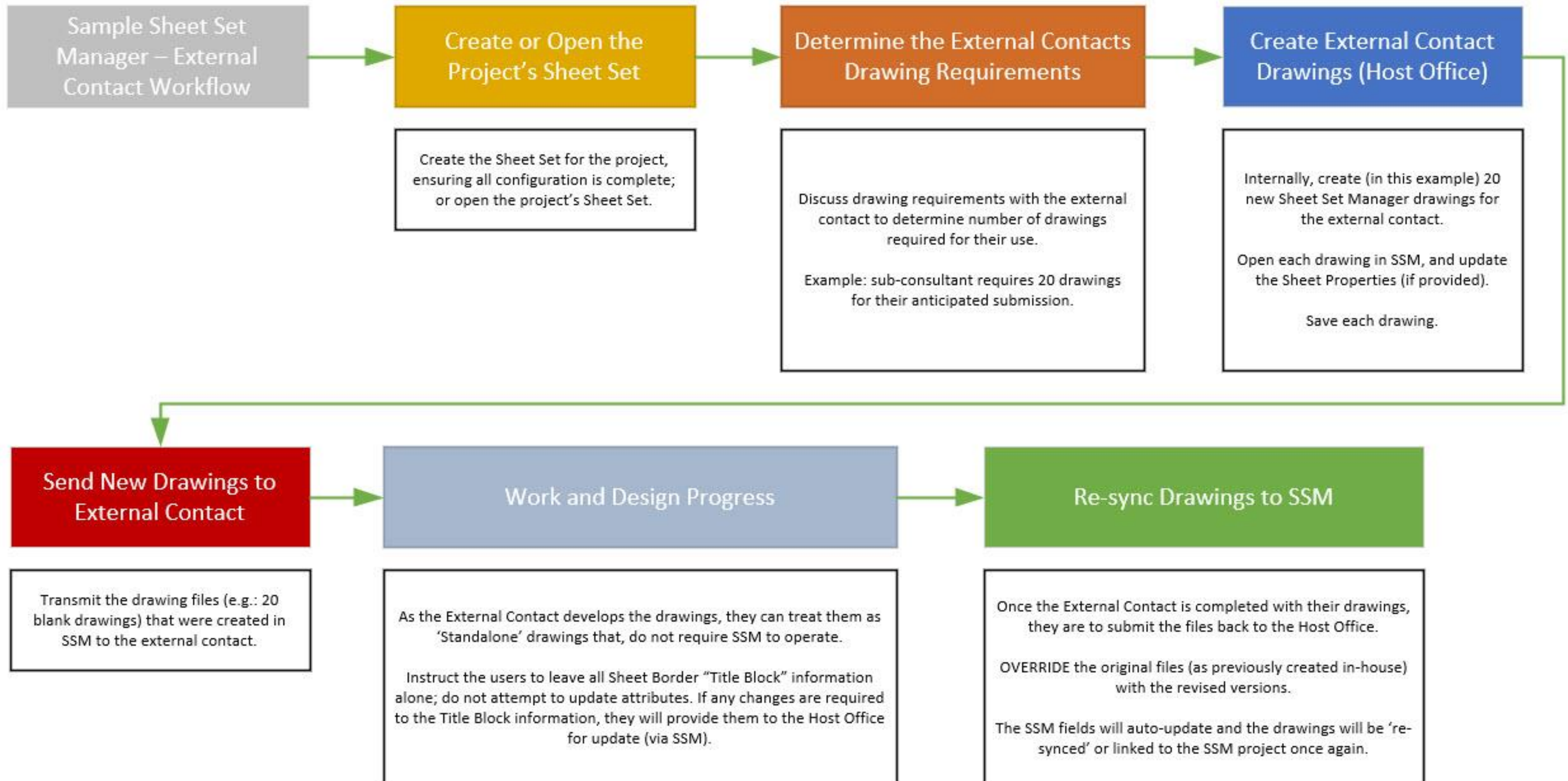
How can I make Sheet Set Manager faster?

- System Variable Adjustments

What workflows are available for External Contacts?

- AutoLISP – Remove Fields to Attributes
- What if they are not familiar with Sheet Set Manager? *(Next Slide)*

# Sample External Contact Workflow



# Bonus Tips *(for good behavior)?...*



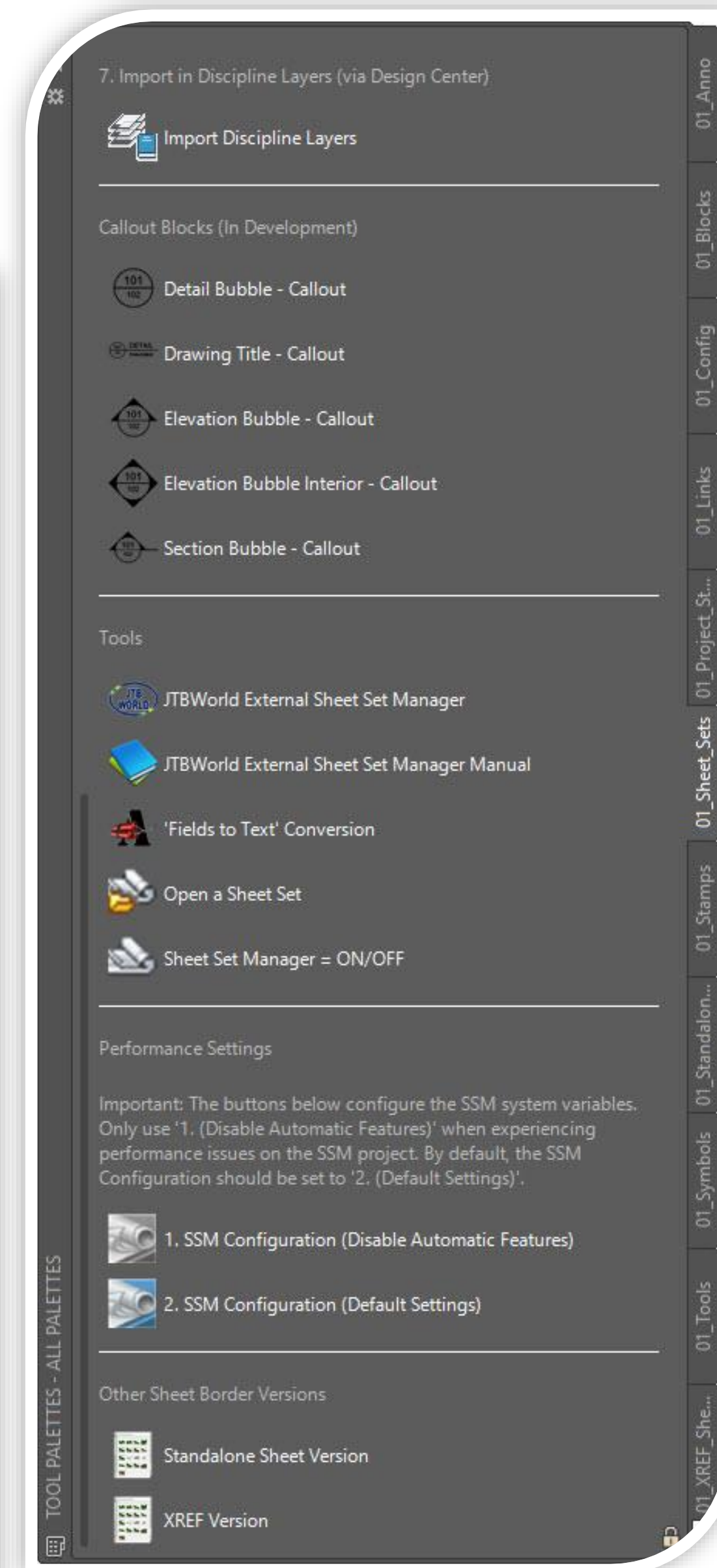
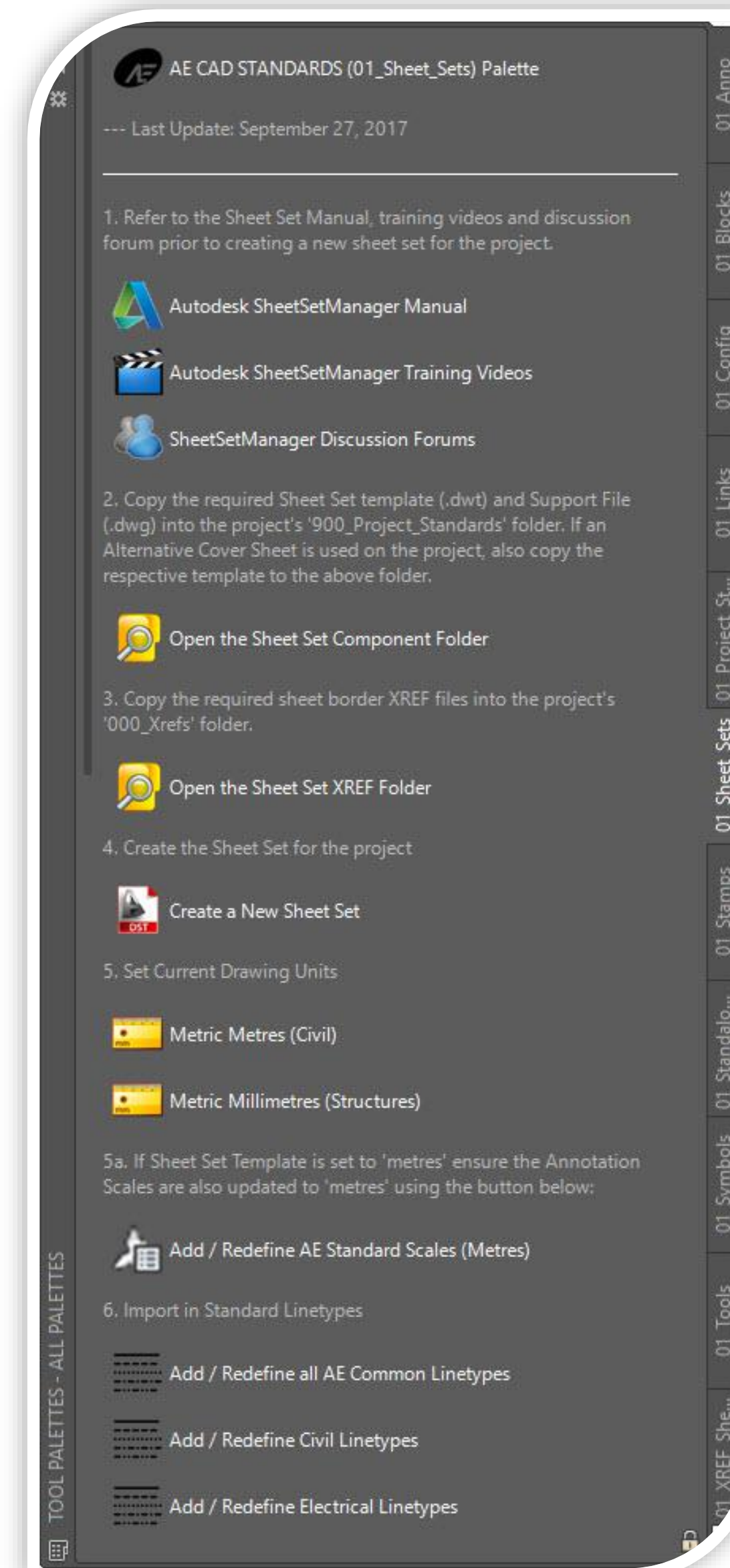
# AutoCAD Tool Palette for Sheet Set Manager

Create a Tool Palette to include Sheet Set specific content, such as:

- Links to Sheet Set Manager documentation, training videos, etc.
- Link to the Sheet Set Template, Resources Folder (Network)
- Button to 'Start a new Sheet Set'
- Callout Blocks Access
- Tools related to SSM (AutoLISP fields to text conversion)
- Performance Adjustments (Variable Settings)



- **“CAD Manager’s Guide: Using Tool Palettes to Manage Standard and Configuration.... Wednesday @ 9:30am!!**
- AU2017 Recording – AU Online

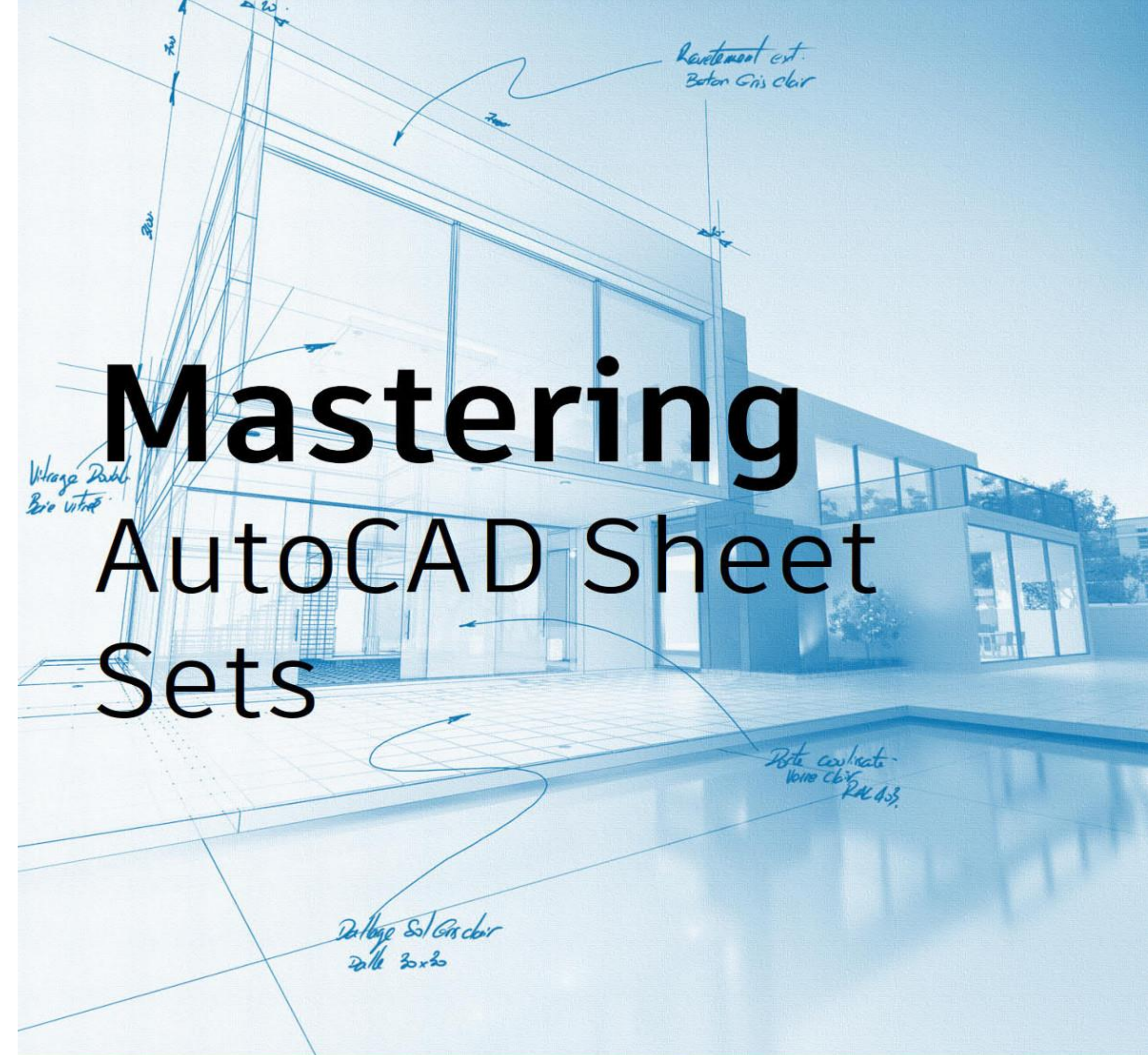


# Mastering AutoCAD Sheet Sets – An Expert Guide

## Autodesk Reference Documentation

- AutoCAD Mastering AutoCAD Sheet Sets (eBook)
  - <https://www.autodesk.com/cad-manager/manage-projects/mastering-autocad-sheet-sets>
- AutoCAD Blog Series: Mastering AutoCAD Sheet Sets
  - <http://blogs.autodesk.com/autocad/tag/mastering-autocad-sheet-sets/>

\*\*\* Section on “Automating Callouts/Sheet Views/View Labels”



# Mastering AutoCAD Sheet Sets

## An Expert Guide

# Class Summary



**Summary:**  
6 Sheet Set Manager  
Strategies for Success

Setup  
**Templates**

Use  
**Custom Fields**

Standardize  
**DST**

Printing  
**Pre-configs**

Sheet List  
**Functionality**

Performance  
**Workflows**

Thank you for your attendance!  
Enjoy the rest of Autodesk University 2018!

**Chad Franklin**, CAD Coordinator



Associated  
Engineering

GLOBAL PERSPECTIVE.  
LOCAL FOCUS.



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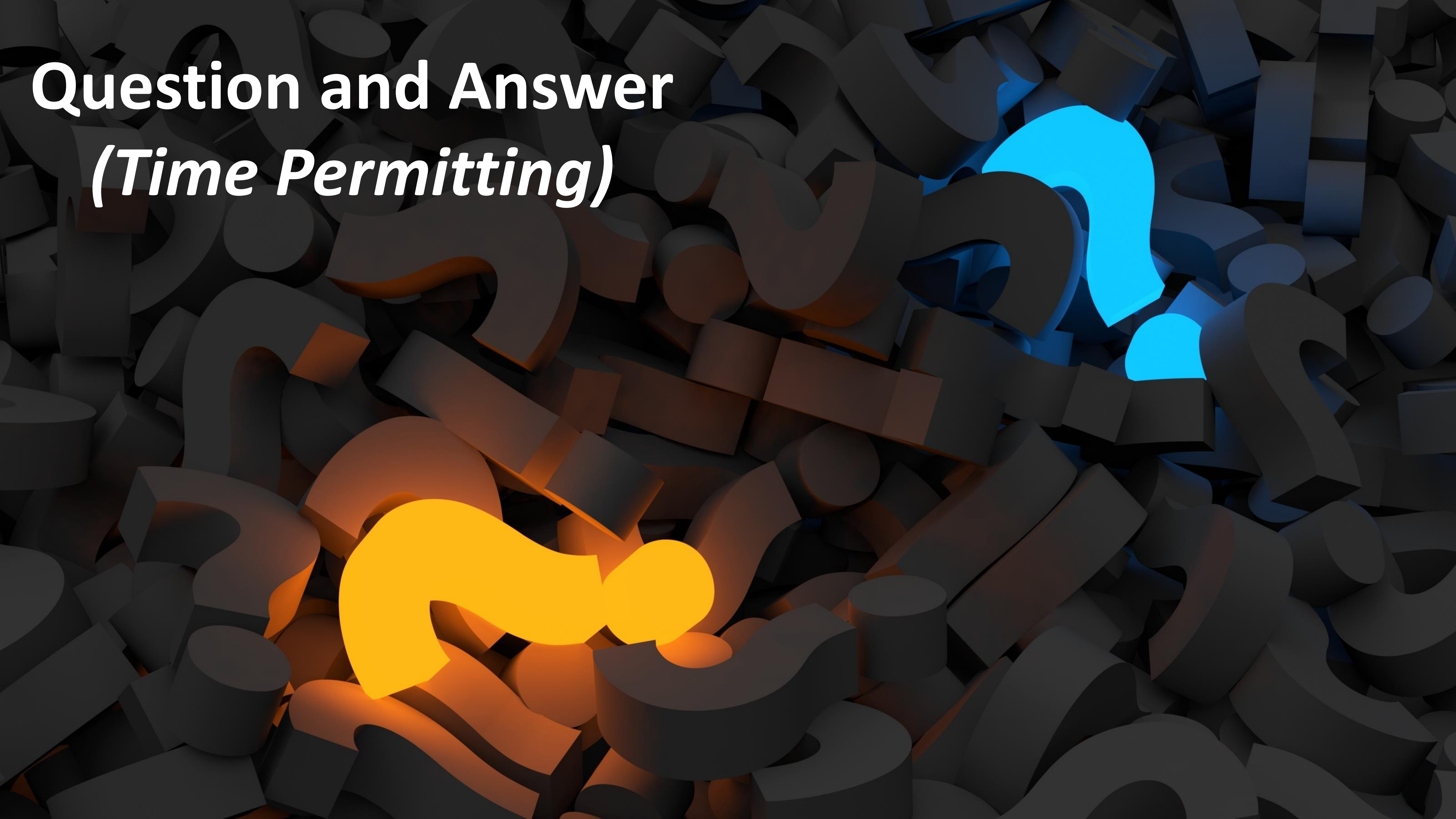
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theCADcafé

www.thecadcafe.com

# Question and Answer *(Time Permitting)*





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