



Organizing Your Plan and Layout Files Using Traditional File Management

Reference Number: **KB-00562**

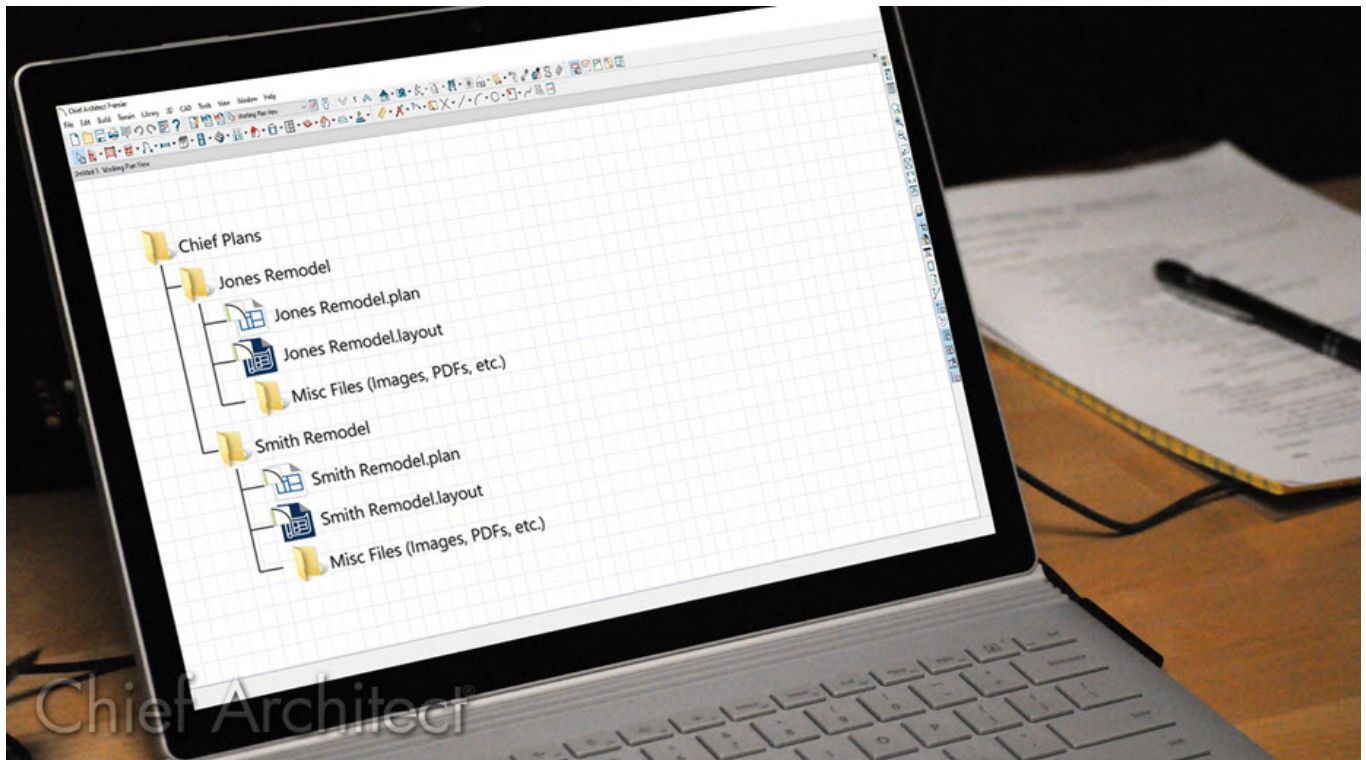
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This article also applies to the following legacy products:

Pro | Architectural | Suite

QUESTION

How can I organize my plan and layout files on my system using Traditional File Management?



IMPORTANT NOTE

File management can be a challenging concept for many computer users, but it's an important skill to develop. In order to use your computer effectively, it's vital to know how to save your work properly, where it's saved on your computer, and how to find it again when using Traditional File Management.

If you are using Project Management, which is available in X17, Home Designer 2026, and newer versions, the management of files is done directly within the Chief Architect/Home Designer program, preventing the need to manage your files outside of the program. To learn more about Project Management, please see the [Related Articles](#) section below.

It's also wise and extremely advisable to have a backup system for your data in place so that in the event of a hardware malfunction, such as a computer virus, hard drive failure, or a natural disaster, you have a backup of your important files. For more information on backing up your data, please see the [Related Articles](#) section below.

It's important to always remember to only work on files that are saved on your local machine's hard drive.

Working on files over a network server, external hard drive, cloud storage service, or USB flash drive type device is not recommended as file corruption and data loss can occur. These options can, however, be a good way to back up your data. But always remember to copy the file from that location to your local machine's hard drive before opening/importing the file. Once local to the system, you can make modifications, save and export the file, exit out of the program, and copy it back to the server, cloud storage service, external hard drive, or USB flash drive device.

ANSWER

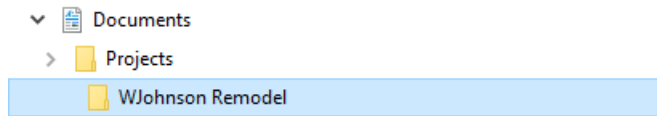
This article offers an example of one way to organize your Chief Architect files when using Traditional File Management; however, any method of saving plans and revisions that creates backups, prevents accidental overwrites, and is consistent and easy to use will work.

1. Create a folder in the **Documents** directory named **Plans** or **Projects**.

All of your plans, layouts, and other associated files should be saved here.

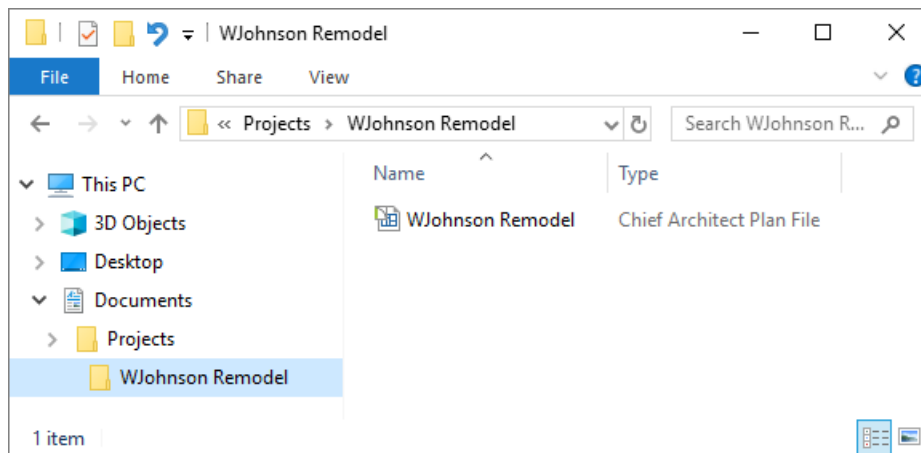
2. Create a client folder for the customer you're working with and **Rename** it to your liking. A Customer's Name or Job number works well.

Example: WJohnson Remodel



3. Launch Chief Architect/Home Designer and select **New Plan**  to open a new, blank plan file.
4. Set your default settings for this plan, select **File> Save As**  from the menu, then save the blank plan to the client folder. Give the plan the appropriate client name or number.

Example: WJohnson Remodel.plan

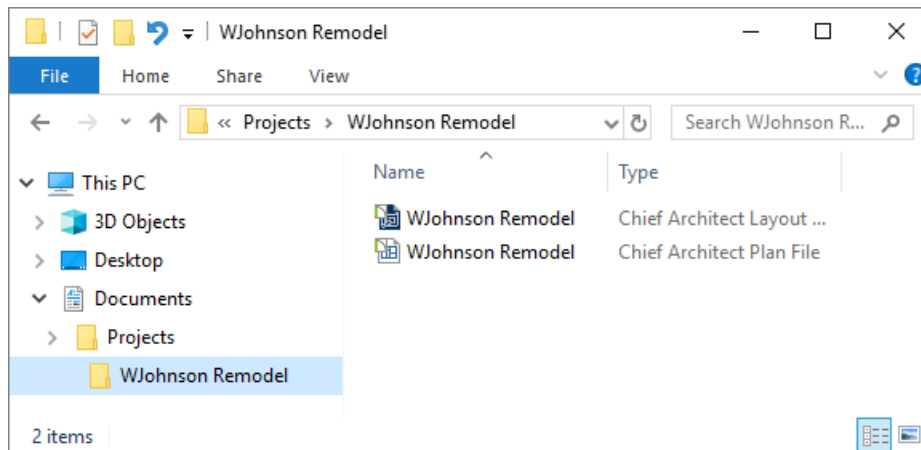


5. Select **New Layout***  to open a new, blank layout and set up your title block, borders, and other layout properties on page 0, which is a Template page in most cases.

**Layouts are only available in Home Designer Pro, Home Designer 2026 and newer, and Chief Architect Premier.*

6. Select **File> Save As**  from the menu and save the layout to the client folder. Give the layout the same name as the plan.

Example: `WJohnson Remodel.layout`



7. You are now ready to start drawing.

Chief Architect files may use imported images, textures, CAD files, PDFs and other custom content saved in their own external data files. Consider storing copies of all external files in the same folder as the plan and layout files that use them, so that they are easily found.

When you finish a phase of a project, it's always a good idea to make a backup of this content. A network server, a cloud storage service, or a USB flash drive are just some of the options that can be used to backup and store files onto. Please see the [Related Articles](#) section to learn more about backing up data.

Related Articles

- [📄 Accessing Your Archive Files \(/support/article/KB-00099/accessing-your-archive-files.html\)](/support/article/KB-00099/accessing-your-archive-files.html)
- [📄 Backing Up and Restoring Chief Architect Content Using Project Management \(/support/article/KB-03211/backing-up-and-restoring-chief-architect-content-using-project-management.html\)](/support/article/KB-03211/backing-up-and-restoring-chief-architect-content-using-project-management.html)
- [📄 Backing Up Chief Architect Content Using Traditional File Management \(/support/article/KB-00001/backing-up-chief-architect-content-using-traditional-file-management.html\)](/support/article/KB-00001/backing-up-chief-architect-content-using-traditional-file-management.html)
- [📄 Enabling or Disabling Project Management \(/support/article/KB-03210/enabling-or-disabling-project-management.html\)](/support/article/KB-03210/enabling-or-disabling-project-management.html)
- [📄 Exporting Projects and Disconnected Files \(/support/article/KB-03212/exporting-projects-and-disconnected-files.html\)](/support/article/KB-03212/exporting-projects-and-disconnected-files.html)
- [📄 Locating Lost or Missing Files on Your Computer \(/support/article/KB-00369/locating-](/support/article/KB-00369/locating-)

[lost-or-missing-files-on-your-computer.html](#)

📄 [Managing Your Archive Files \(/support/article/KB-00775/managing-your-archive-files.html\)](#)

📄 [Using the Backup Entire Plan/Layout Tool \(/support/article/KB-00987/using-the-backup-entire-plan-layout-tool.html\)](#)