

Organizing your Plan and Layout Files

Reference Number: **KB-00562**

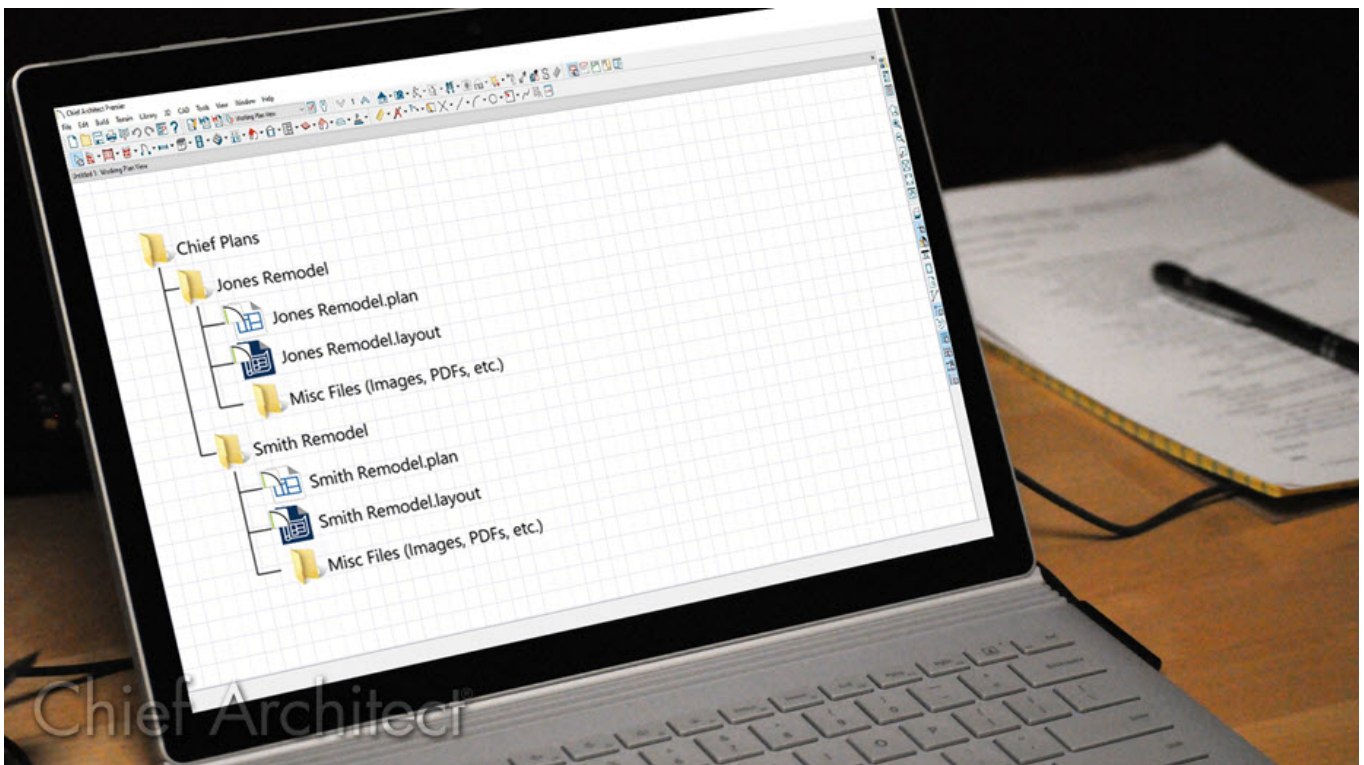
Last Modified: **September 20, 2024**

The information in this article applies to:



QUESTION

How can I organize my plan and layout files on my system?



IMPORTANT NOTE

File management can be a challenging concept for many computer users, but it's a very 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.

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 always have a backup of your important files.

It's important to always remember to only work on plans 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 attempting to work on it. Once it's on your computer, you can open the file, make your modifications, save 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.

Most individuals or companies have an off-site incremental backup run every night, and a full backup at least once a week, so they never lose more than a day's worth of data should something unexpected occur.

ANSWER

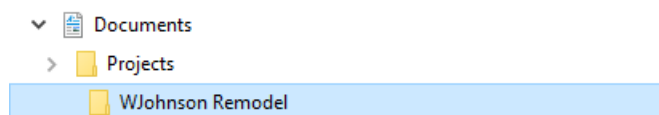
This article offers an example of one way to organize your Chief Architect project files; however, any method of saving plans and revisions that creates backups, prevents accidental overwrites, and is consistent and easy to use will work.



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

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

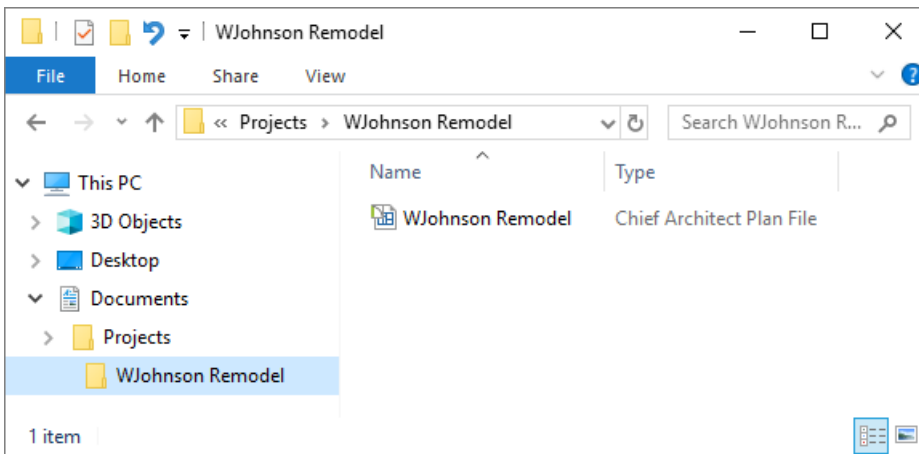
2. Create a client folder for the customer you're working with and **Rename** it to your liking. A Customer's Name or Job number works well.


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:

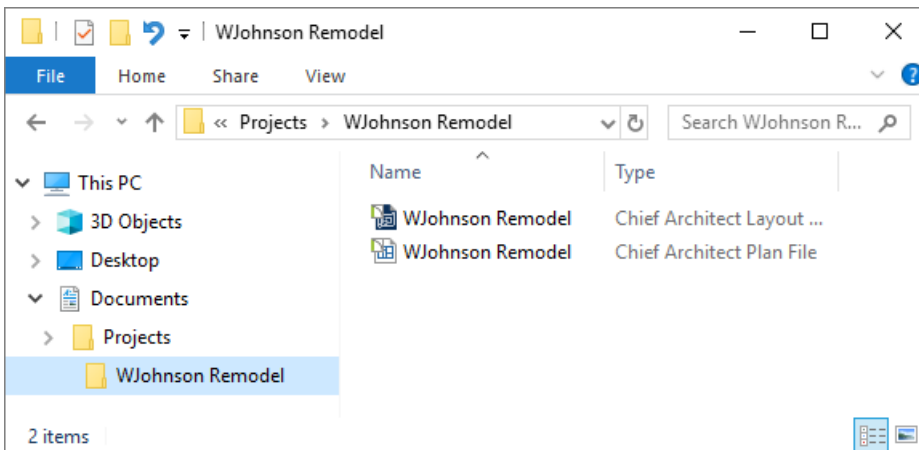


5. Select **New Layout***  to open a new, blank layout and set up your Title Block, Borders, and other layout properties on page 0, which is a Template page in most cases.

**Layouts are only available in Home Designer Pro, Chief Architect Interiors, 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:




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.

BACKING UP & SHARING PLANS

It's best to open plan and layout files from another computer or flash drive, and then immediately save the plan and layout to the local computer before working on them. Then, open the plan and layout from the local computer, do your work, then save your work locally to the desired folder on the originating computer or flash drive. This way you have a backup of the plan should something go wrong. This also helps avoid data corruption that can occur when working across a network or on an external drive.

It's also recommended that you use the **Backup Entire Plan/Layout**  tool when backing up or sharing plan or layout files. Using this tool will ensure that whoever opens the plan or layout file will have all of the texture and PDF files associated with a plan, or all of the plan files associated with a layout. For information on using this tool, please see the [Related Articles](#) section below.

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 Chief Architect Content \(/support/article/KB-00001/backing-up-chief-architect-content.html\)](/support/article/KB-00001/backing-up-chief-architect-content.html)
- [📁 Locating Lost or Missing Files on your Computer \(/support/article/KB-00369/locating-lost-or-missing-files-on-your-computer.html\)](/support/article/KB-00369/locating-lost-or-missing-files-on-your-computer.html)
- [📁 Managing Your Archive Files \(/support/article/KB-00775/managing-your-archive-files.html\)](/support/article/KB-00775/managing-your-archive-files.html)
- [📁 Using the Backup Entire Plan/Layout Tool to Send Files to Another User \(/support/article/KB-00987/using-the-backup-entire-plan-layout-tool-to-send-files-to-another-user.html\)](/support/article/KB-00987/using-the-backup-entire-plan-layout-tool-to-send-files-to-another-user.html)