Creating and Using Layout Templates

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QUESTION

I would like to create and use a layout template in Chief Architect or Home Designer. How do I do this?

ANSWER

A template file has all of your preferred default settings, layer display options, and other file-specific information saved and waiting for you.

You can create templates in any version of Chief Architect or in Home Designer 2026 and newer versions.

A layout template can also feature a border with your company information, logo, text macros and other details. When you identify a file as a template, Chief Architect refers to that file for this information any time you open a new layout file.
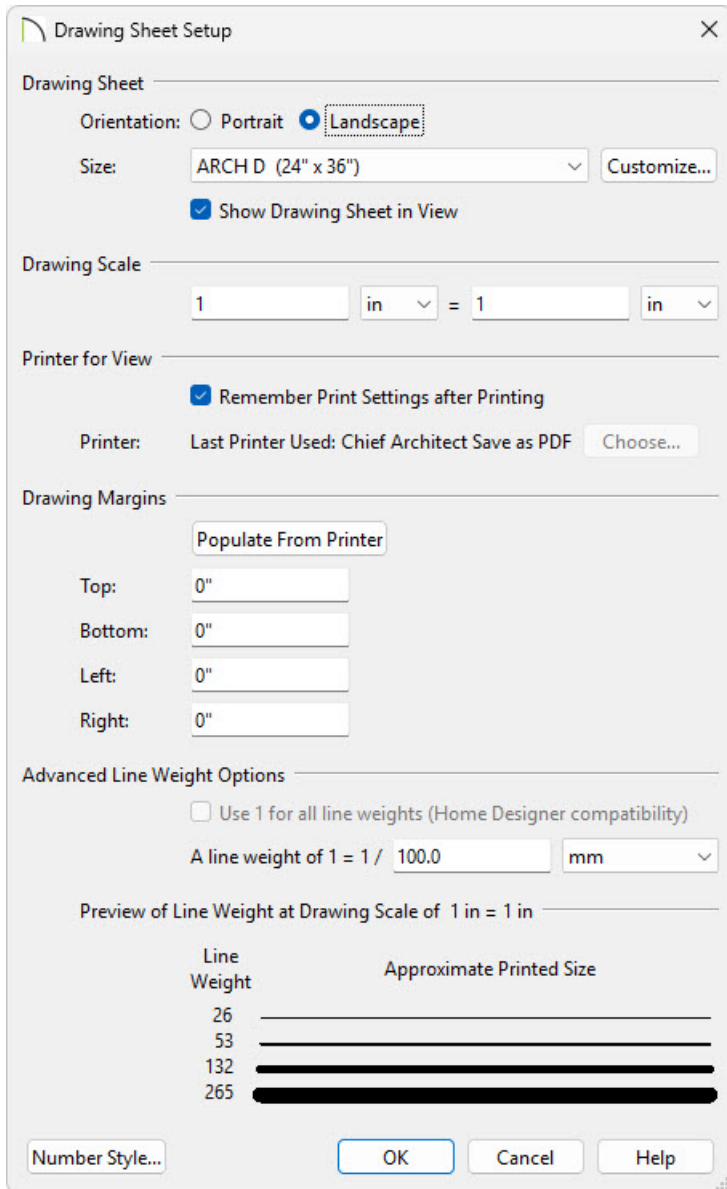
Creating a layout template is easy and can save you a lot of time when creating a new layout file. In this article, we will discuss how to:

- Setup the orientation and size
- Setup the layout box defaults
- Set default designer and client info*
  *Applies to Chief Architect Premier only
- Create the layout title block and border
- Save and use the file as a template
- Change the default layout template
- Create a new layout or project

> **Note:** Although not every setting or topic relating to a layout template is discussed in this article, it's important to familiarize yourself with the various layout template settings that can be changed or specified. These include: default settings, layers and layer settings, layout page information, title block and border information, drawing sheet setup information, as well as any text, dimensions, or CAD created.

To setup the orientation and size

1. In a new layout file, navigate to **File> Print> Drawing Sheet Setup** ↕ .

- ○ Set the Drawing Sheet **Orientation** and **Size** to your liking.

  In most cases, the Printer Paper and Drawing Sheet sizes should be the same.

- ○ Make sure the **Drawing Scale** is set at a 1 to 1 scale.

  Example: 1 in = 1 in

  > It is important not to change this, as the drawing scale is set when you send individual views to the layout.

  For more information about drawing scale as well as line weight scaling, click the **Help** button at the bottom of this dialog.

- ○ Make any other desired changes, then click **OK** to apply your settings and close the dialog.

To setup layout box defaults

1. Navigate to **Edit> Default Settings** 🔧, select **Layout Box**, then click **Edit**.

2. On the LINE STYLE panel of the **Layout Box Defaults** dialog:
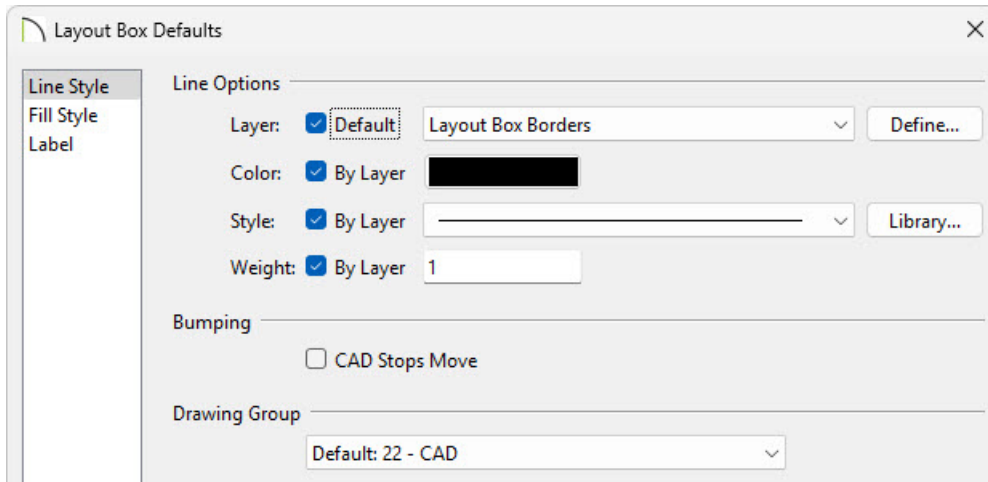
- Set the **Layer*** the layout boxes will be created on.

- Choose the line **Color**, **Style**, and **Weight** if the layout box borders are set to display.

- If you want CAD information to stop the movement of the layout box, check the box for **CAD Stops Move**.

- Set the **Drawing Group*** you want these layout boxes to display with.

  *Applies to Chief Architect Premier only.

3. On the FILL STYLE panel, choose a **Pattern**, **Scale**, **Offset and Angle**, and **Pattern Appearance** if you want the layout boxes to come in with a fill for the entire view.

Layout Box Defaults ✕

Line Style
Fill Style
Label

Pattern

Type: No Pattern ⌄   Library...

Scale

Width: 2"   ⬍

Height: 2"   ⬍

☐ Retain Aspect Ratio

Offset and Angle

Row Offset: 1/2   ⬍

Horizontal Offset: 0"   ⬍

Vertical Offset: 0"   ⬍

Angle: 0.0°   ⬍

Pattern Appearance

Line Weight: 1   ⬍

Color: [   ]

○ Custom Color

◉ Use Layer Color

○ Use Background Color

Transparency: ▮————————— 0%

☑ **Background**

Color: [   ]

○ Custom Color

○ Use Layer Color

◉ Use Background Color

Transparency: ▮————————— 0%

Add to Library   Preview Width: 12" ⌄

Number Style...   OK   Cancel   Help

4. On the LABEL panel:

Layout Box Defaults

Line Style
Fill Style
Label

☐ Suppress Label in All Views

Label Options

○ Automatic Label

○ Specify Label:

Insert: > M

🔘 Use Callout   Edit...

○ Use Marker   Edit...

☑ Use Default Formatting

☐ Display Border

Alignment: Left

☑ Auto Adjust Text Direction

Plan View Position and Orientation

X Offset: 0"

Y Offset: 3/4"

Angle: 0.0°   🔘 Relative Angle ○ Absolute Angle

Reference: Bottom Center

Label Layer

🔘 Use System Layer (Layout Box Labels)

○ Use Object Layer (Layout Box Borders)

○ Use Custom Layer:

Layout Box Labels   Define...

Number Style...   OK   Cancel   Help

- Choose if you want to **Suppress Label**, use the **Automatic Label**, **Specify Label**, use a **Callout***, or use a **Marker*** for your layout box labels.

  Using a **Callout** or a **Marker** will allow you to **Specify** details of that callout or marker respectively.

- Decide if you want to display a border around the label and the alignment of the label.*

- Set the **Position and Orientation*** of the label.

- Decide what layer the label should be on.*

  *Applies to Chief Architect Premier only.

5. Click **OK** and **Done** to close the dialogs and confirm the changes.

To set default designer and client information*

*Applies to Chief Architect Premier only

1. To set this information select **Edit> Preferences** 📄P from the menu if you're on a Windows PC or **Chief Architect> Preferences** 📄P if you're on a Mac. In the **Preferences** dialog that opens, access the NEW PLANS panel.
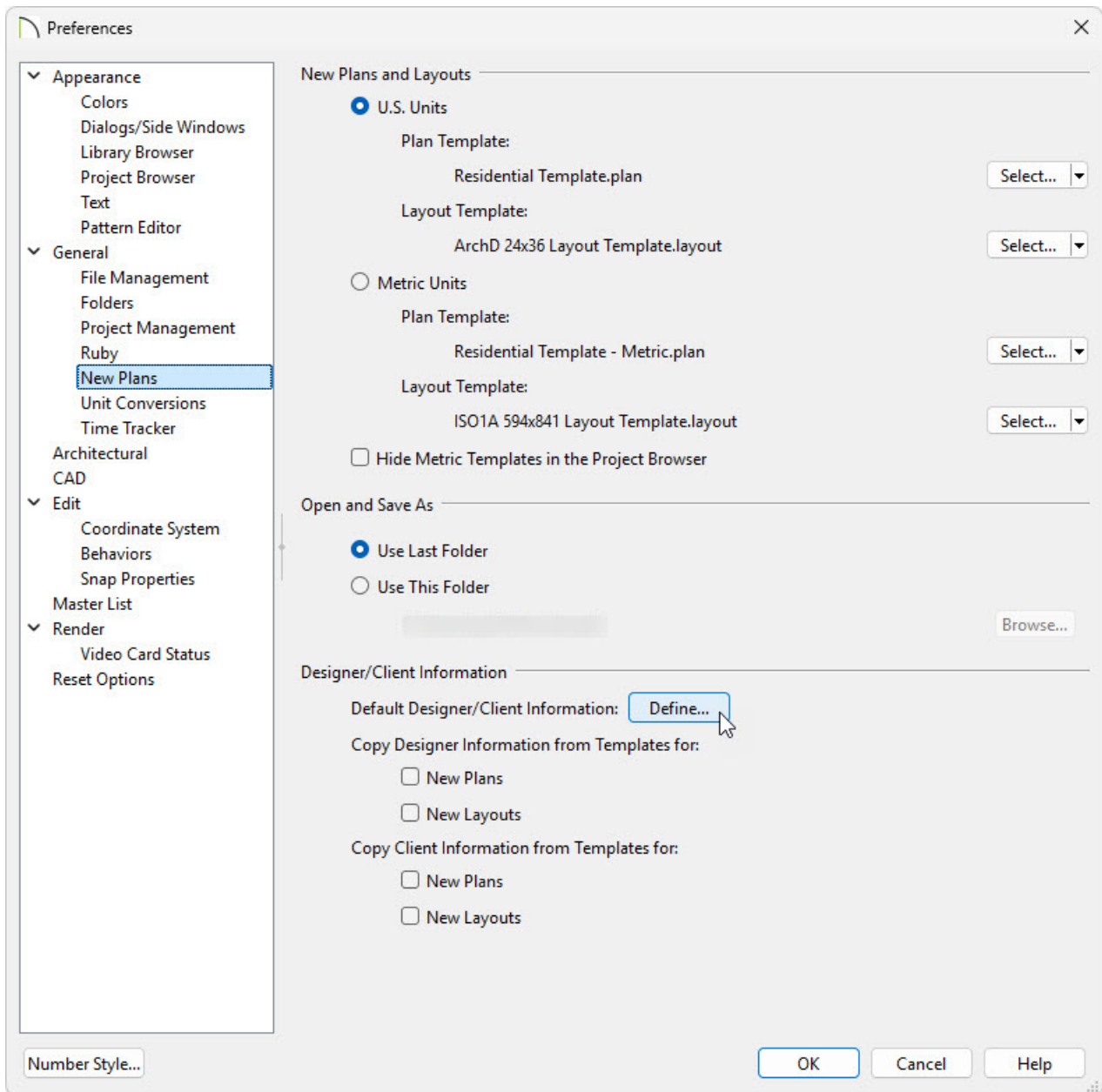

- To the right of Default Designer/Client Information, click **Define**.

- Fill out the information for both the designer and the client. Once you are done filling out this information, click **OK**.

- Next, you can choose whether you'd like to copy this information to your newly created plans or layouts by checking the boxes for **New Plans** or **New Layouts** which can then be reported by using macros.

Additionally you can set this information inside of a layout file itself:

- Access your layout template or the file where you would like to specify this information.

- Navigate to **Tools> Designer/Client Information** ✉️.

- Fill out the information, then click **OK**.

2. To report the Designer/Client information in your files, you will need to use a text macro. Macros are commands that insert dynamic information into a text box. They are available in both plan and layout files, but are particularly useful in layouts.
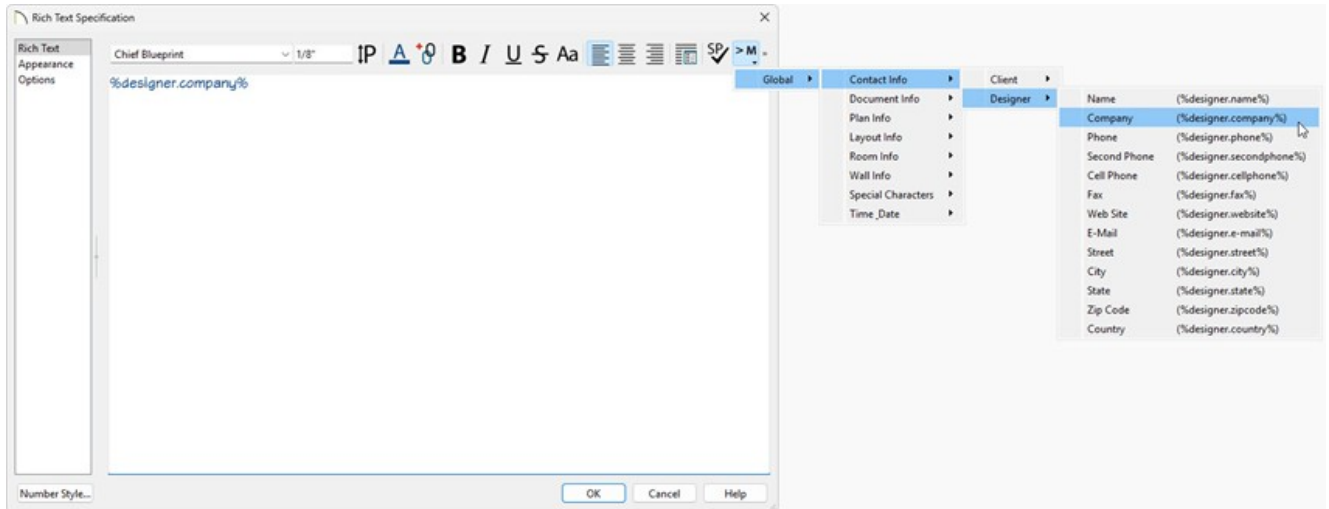
- In your layout template file, navigate to **CAD> Text> Rich Text** 𝕋.

- Click at your preferred location to open the **Rich Text Specification** dialog.

- Select the **Insert Macro** >M tool, then navigate to **Global> Contact Info> Client/Designer** and select the macro that correlates to the information you would like to be reported. You can then use these macros when creating your custom title block.

To create a layout border and title block

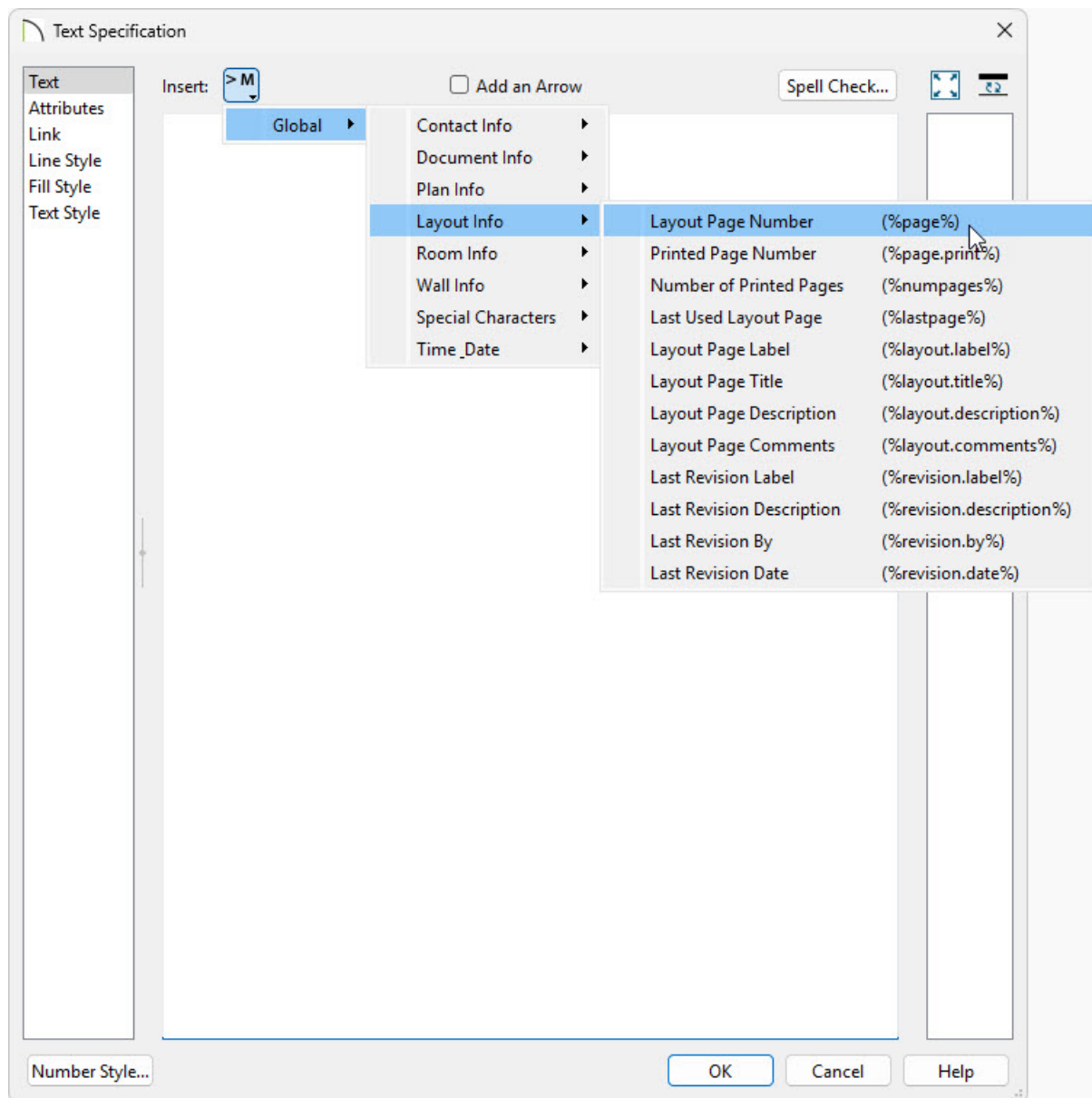1. First, go to Page 0 of the layout file.

> Page 0 is the Default Page Template. Items placed on this page show on every page of the layout that is assigned to follow this Page Template. It's possible to set up more than one page template. Please refer to the Related Articles section below for more information.

2. Using the CAD tools, create a border and title block that you want to display on each page of the layout.

3. Using **Text** 𝕋 or **Rich Text** 𝕋, add a company name, project information, and any other notations that you may want to display on each page of the layout.

4. To insert a company logo, image, or PDF, select **File> Import> Import Picture** or **File> Import> Import PDF**.

5. After placing a text object in the layout, select the **Insert Macro** >M* tool to insert a macro.

Macros are available in both plan and layout files, and allow you to automatically insert information such as the page number, date and time, and file name.

Applies to Chief Architect Premier only.

Text Specification			
Text	Insert: >M		Add an Arrow

Global ▶

Contact Info	▶
Document Info	▶
Plan Info	▶
Layout Info	▶
Room Info	▶
Wall Info	▶
Special Characters	▶
Time _Date	▶

Layout Page Number	(%page%)
Printed Page Number	(%page.print%)
Number of Printed Pages	(%numpages%)
Last Used Layout Page	(%lastpage%)
Layout Page Label	(%layout.label%)
Layout Page Title	(%layout.title%)
Layout Page Description	(%layout.description%)
Layout Page Comments	(%layout.comments%)
Last Revision Label	(%revision.label%)
Last Revision Description	(%revision.description%)
Last Revision By	(%revision.by%)
Last Revision Date	(%revision.date%)

Text
Attributes
Link
Line Style
Fill Style
Text Style

Spell Check...

Number Style...   OK   Cancel   Help

- You can use the **Layout Page Number (%page%)** macro to show the page number for each page of the layout.

- Use one of the Time or Date macros to insert the date or time in the layout to automatically let you know when you printed this layout.

- Add the file name for this layout sheet using one of the File Info text macros.

- Inserting this next to the binding edge will allow you to determine which file it is or even where this set of

plans is located on your computer, should you need to reprint them in the future.

To save and use the file as a template

1. With your layout open, select **File> Save As Template** 🔖, or within the **Project Browser** 📋, right-click on your layout file, and choose **Save as Template** from the contextual menu when you're using Project Management.

   In X16 and prior, select **File> Templates> Save As Template** 🔖.

   > **Note:** On a Mac, hold down the Control key while clicking to initiate a right-click command. More information about right-click commands on Apple input devices can be found in the following Apple resource: Right-click on Mac (https://support.apple.com/guide/mac-help/right-click-mh35853/mac).

2. In the **Save as Template** dialog that displays:
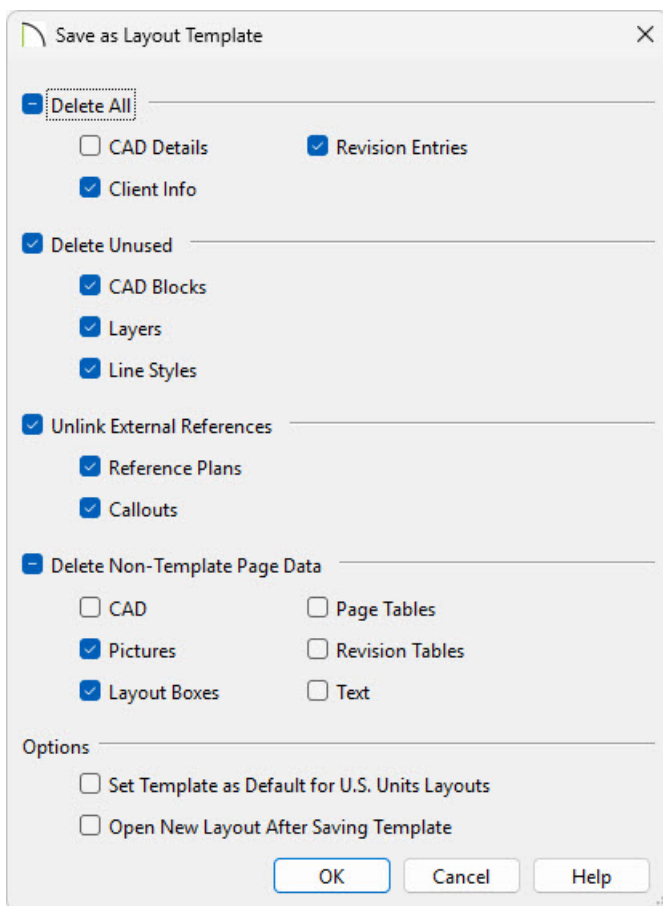
   - Check the box beside each category of object or data that you want to delete from the current file.

   - Check **Set Template as Default for U.S. Units/Metric Layouts** to use the new template as your default template whenever you select **File> New Layout** 📄.

   - Check **Open New Layout After Saving Template*** if you'd like to create a new layout right away.

     *Available in Chief Architect Premier.

- Click **OK**.

3. Give the new layout template a short, descriptive name.

4. When using Project Management in X17 or Home Designer 2026, the template will be located in your Plan and Layout Templates folder within the **Project Browser** ▣.

   In X16 and prior, or when using Traditional File Management in X17 or Home Designer 2026, click **Save** and the program will automatically save the template to the program's Templates directory on your computer.

   > If you want to share your newly created template with a colleague or another Chief Architect user, please see the resources located in the Related Articles section below.

To change the default layout template

You can change the default layout template that is used whenever you open a new layout file by accessing the program's Preferences dialog. If the "Set Template as Default for U.S. Units/Metric Layouts" box was checked in the section above, it's not necessary to follow the instructions below as you have already set your customized layout to be the default layout template.

1. Select **Edit> Preferences** ▣P from the menu if you're on a Windows PC or **Chief Architect/Home Designer> Preferences** ▣P if you're on a Mac.

2. On the NEW PLANS panel of the **Preferences** dialog:
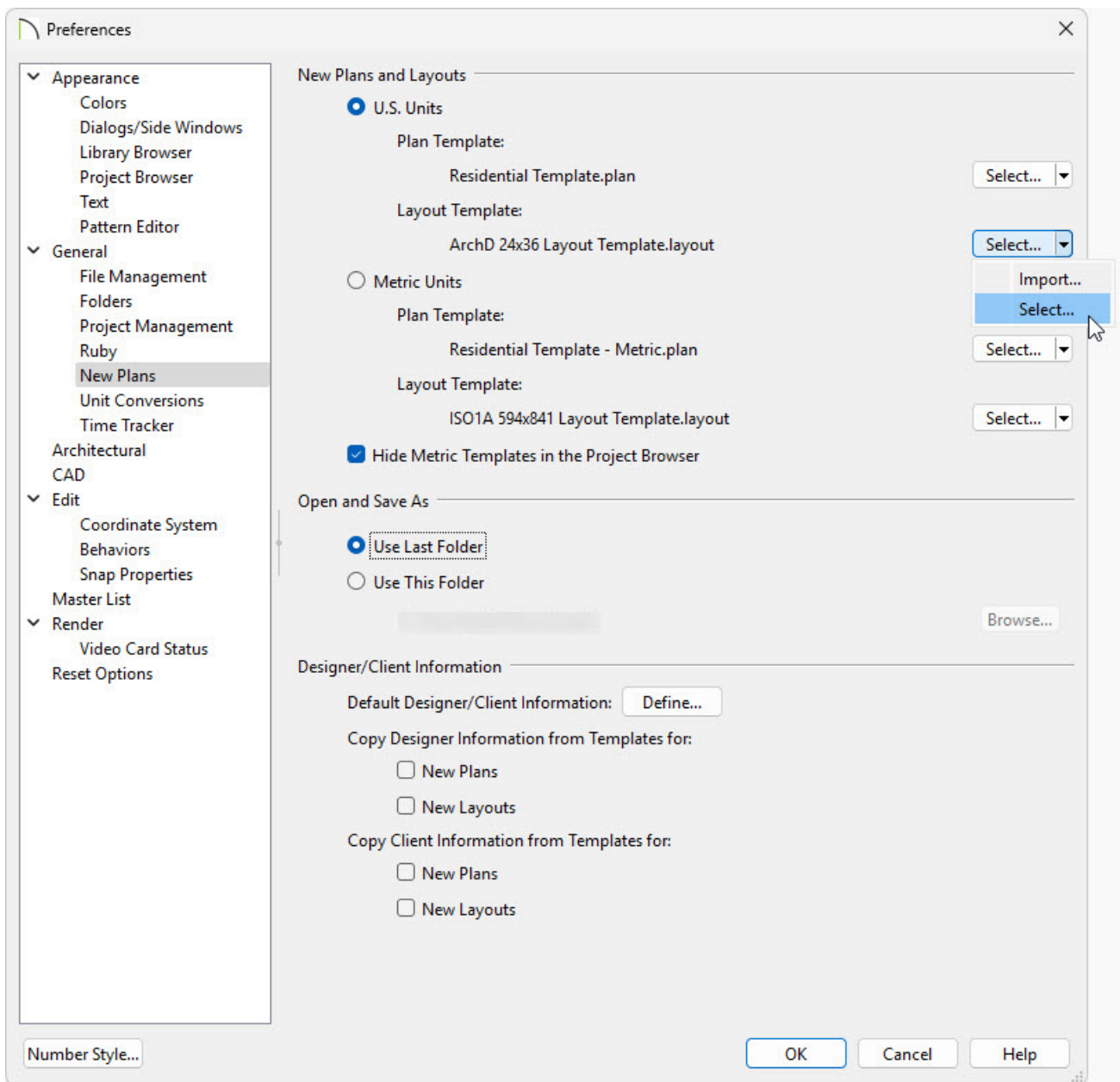
When using Project Management in X17 or Home Designer 2026, follow the steps below:

○ Click the **Select** button to the right of the Layout Template option to open the **Select a Replacement Template** dialog.

   If you don't see the **Select** button, click on the drop-down arrow next to **Import** and then choose **Select**.

○ In the **Select a Replacement Template** dialog, expand the **Plan and Layout Templates** folder, locate the template you'd like to use, select it, and click **OK** to set it as your default template. If the layout template you'd like to use isn't listed, it's likely that it hasn't been imported into Project Management.

○ To import into Project Management, click on **Import**

   If you don't see the **Import** button, click on the drop-down arrow next to **Select** and then choose **Import**.

   Additionally, you can use the Project Browser to import templates by right-clicking on the "Plan and Layout Templates" section within the Project Browser and choosing "Import Template(s)".

> You can also set a template as a default by right-clicking on it within the Project Browser and choosing "Use as Default Plan/Layout Template."

- In the **Select a Layout Template File** dialog, locate the Layout file you'd like to import, select it, and choose **Open**.

- Once it has been imported, repeat the initial steps above.

- Click **OK** to close the dialog. The Project Browser will display an icon beside the default template(s), as well as display a tooltip when hovering over the file(s).
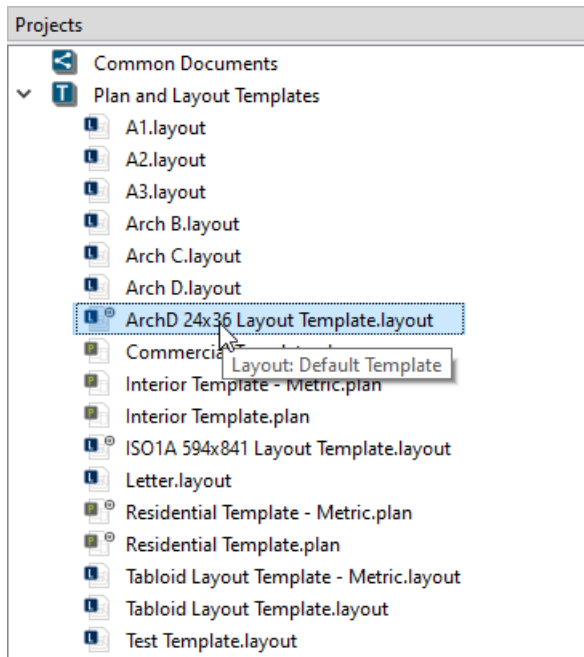
In X16 and prior, or when using Traditional File Management in X17 or Home Designer 2026, follow the steps below:

- Click the **Browse** button to the right of the Layout Template text field for the unit of measurement you're using.

  If you don't see the **Browse** button, click on the drop-down arrow next to **Edit Path** and then choose **Browse**.

- In the dialog that opens next, browse to the location of your new layout template file, select it, then click **Open** to specify this file as your default layout template.

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

Now, when a new layout or project is created, the file(s) specified in Preferences will be the default option.
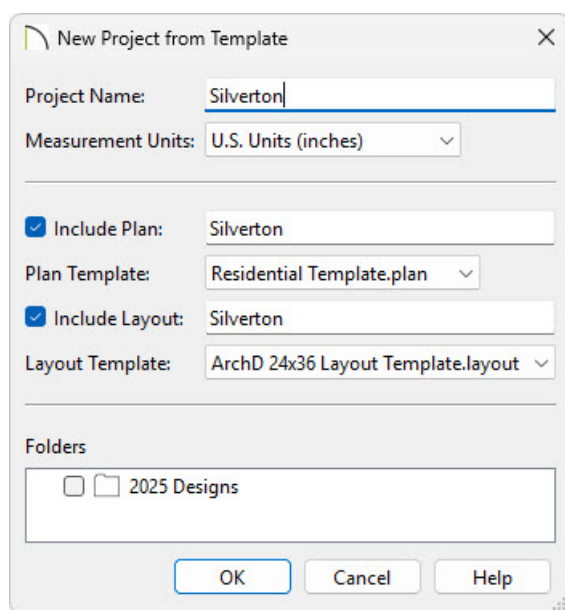
To create a new layout or project

1. Select **File> New Project** to create a new project.

   In X16 and prior, or when using Traditional File Management in X17 or Home Designer 2026, select **New> Layout** instead. The file that opens will be based on the template specified in Preferences.

2. Specify a **Project Name** and choose your **Measurement Units**.

3. Check the **Include Layout** box, choose a **Layout Template** using the drop-down, make any other desired adjustments, then click **OK**.

Note: The Layout Template selection will initially match the template specified in Preferences.

New Project from Template ✕

Project Name: Silverton

Measurement Units: U.S. Units (inches)

☑ Include Plan: Silverton

Plan Template: Residential Template.plan

☑ Include Layout: Silverton

Layout Template: ArchD 24x36 Layout Template.layout

Folders

☐ ☐ 2025 Designs

OK   Cancel   Help

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Related Articles

Creating and Using Plan Templates (/support/article/KB-00463/creating-and-using-plan-templates.html)

Creating Custom Templates from Existing Projects (/support/article/KB-03094/creating-custom-templates-from-existing-projects.html)

Exporting Projects and Disconnected Files (/support/article/KB-03212/exporting-projects-and-disconnected-files.html)

Resizing a Layout Title Block and Border (https://www.chiefarchitect.com/support/article/KB-02862/resizing-a-layout-title-block-and-border.html)

Sharing Projects in a Work Environment that is Utilizing Cloud/Network Services (/support/article/KB-03155/sharing-projects-in-a-work-environment-that-is-utilizing-cloud-network-services.html)

Using Layout Template Pages (https://www.chiefarchitect.com/support/article/KB-03018/using-layout-template-pages.html)