PSPlace Help version 4

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Welcome To ProjectSymbols

Manufacturer CAD Symbol Libraries

ProjectSymbols™

Welcome to the on-line help for ProjectSymbols program. Click here to begin.

Getting Started

Welcome to the on-line for ProjectSymbols.

What can you expect from the ProjectSymbols program?
The ProjectSymbols program is the industry leader in productivity software for the design and furniture dealer professionals.
ProjectSymbols is the combined software package of the PSPlace program and the manufacturer 2D and 3D graphic libraries that are used inside of AutoCAD. Some of the key features available to you with this software are as follows:

- Create accurate space planning designs based on the manufacturers' specs
- Accurate product counts
- Easily generate installation drawings with a click of a button. Texted and non-texted plans are available based on the manufacturer's layering scheme.
- Specify options such as fabrics and finishes while placing graphics.
- Re-option product that was previously placed or add options
- Create 3D presentation drawing from the 2D layouts with a click of a button.
- Create custom AutoCAD blocks with the Make Special command to produce intelligent symbols.

Software Requirements & Tech Support:

In order to use ProjectSymbols, you must have a full licensed copy of AutoCAD.
The ProjectSymbols software currently supports AutoCAD versions 2000 through 2007. ProjectMatrix does not support any LT version of AutoCAD. It is also helpful to have a general knowledge of the basic principles of the AutoCAD program.
If you need to obtain either the software or would like training to use any of the products ProjectMatrix makes, please contact us via any of the methods shown below.

1.) On the Internet:

www.projectmatrix.com (contains full details on all or our software.)

2.) Phone & Fax Numbers:

p. 513-554-1665
f. 513-554-1255

3.) Postal Address:

11655 Lebanon Road, Cincinnati, Ohio 45241

4.) Electronic Mail:

General Information: info@projectmatrix.com
Sales: sales@projectmatrix.com
Technical Support: support@projectmatrix.com

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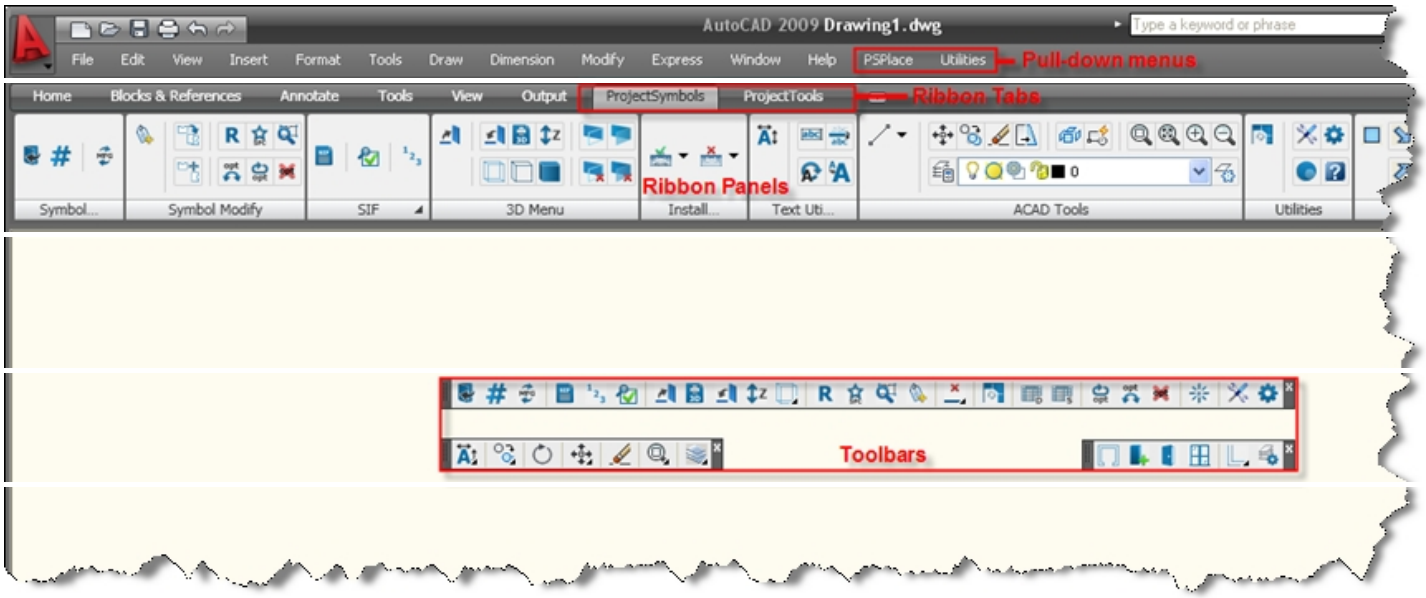
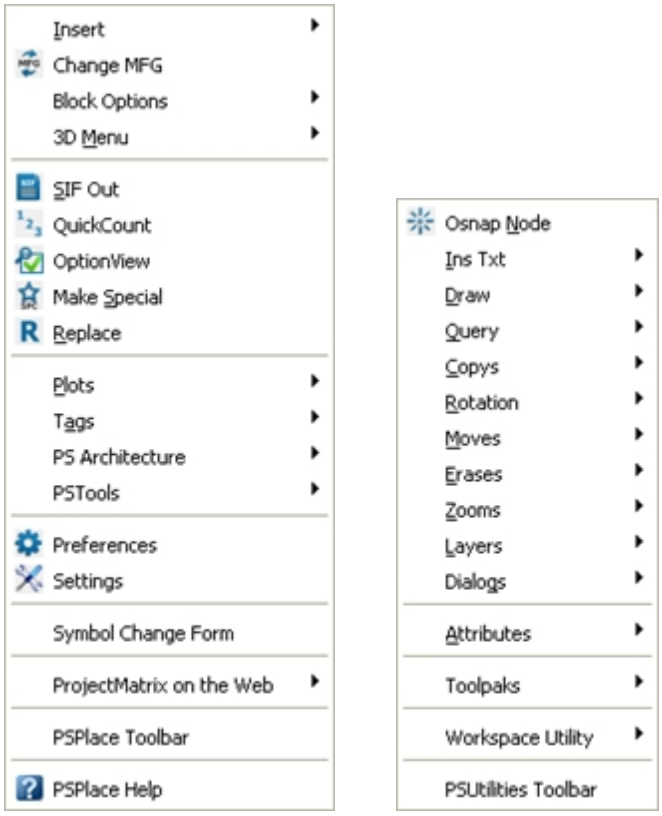
Toolbars and Menus

ProjectSymbols adds many new functions to the AutoCAD workspace, allowing the user to increase productivity through integrating manufacturer catalog data and user-defined symbol placement. In order to present a gradual learning curve, ProjectSymbols allows the user to access its functions through the same AutoCAD interface with which they are already familiar. To this end, ProjectSymbols adds its own pull-down menus, ribbons, and toolbars to the AutoCAD interface. These allow many of ProjectSymbols' functions to be accessed multiple ways; therefore preserving the flexible workspace of AutoCAD with greatly increased functionality. To begin learning more about the pull-down menus, ribbons, or toolbars, click on one in the image below.

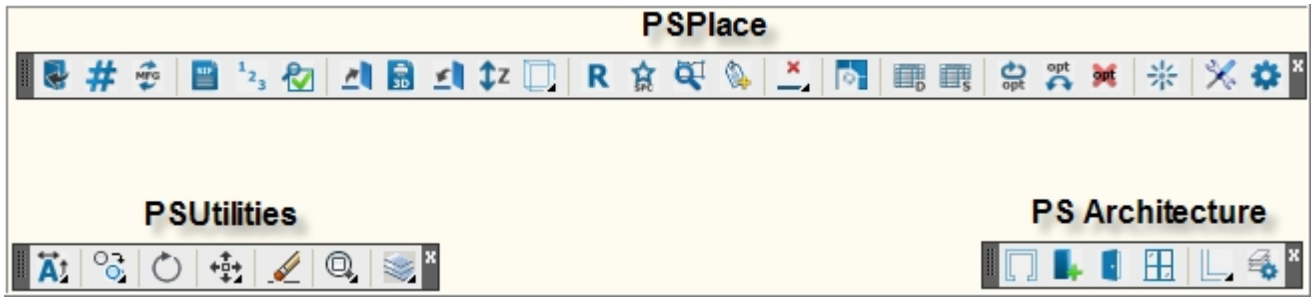


The PSPlace program works by adding a "custom" menu to your current AutoCAD profile. By doing this, any Toolbars or Menus created by the user will not be lost. This is also a great time saver when having to work with multiple profiles inside of AutoCAD.
This section of the Help documentation will give explanations and tips on using these different functions.

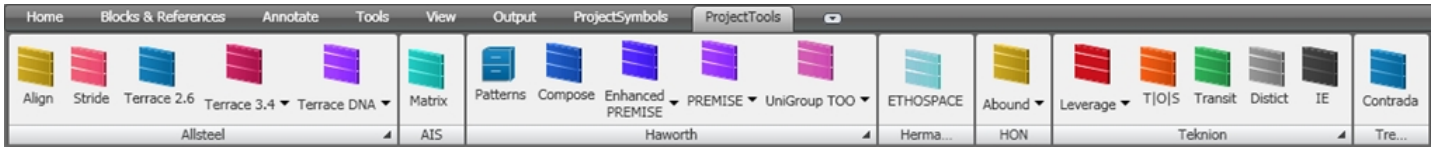
PSPlace Menus: PSPlace and Utilities



PSPlace Toolbars: PSPlace, PSUtilities, and PS Architecture



PSPlace Ribbons (AutoCAD 2009 & 2010): ProjectSymbols and ProjectTools



Menus

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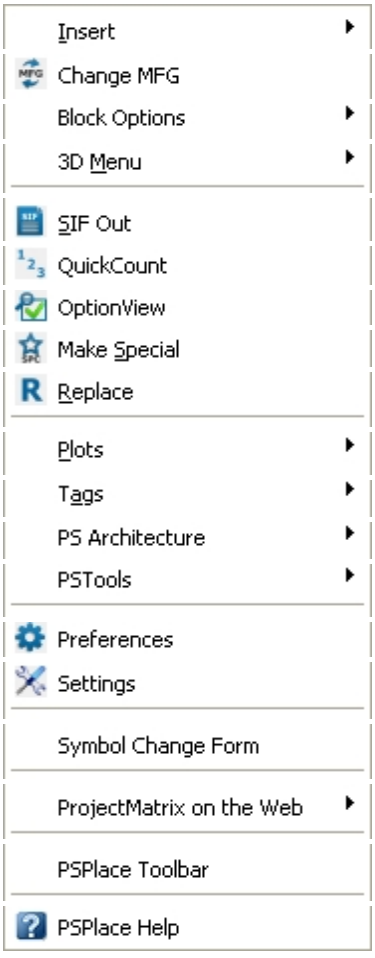
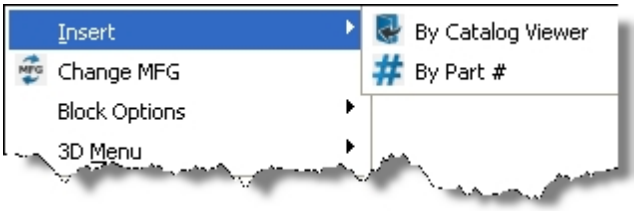
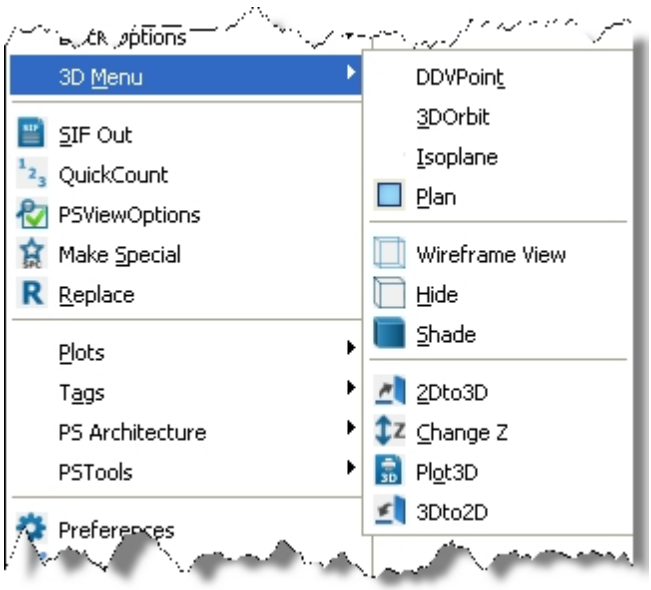
PSPlace Menu

The PSPlace Menu is the pull-down menu system for the ProjectSymbols program. Many of the commands available in the PSPlace menu have corresponding Toolbar short-cuts. Please refer to the PSPlace Toolbar section to locate the needed short-cut.



Insert -	This option gives you the ability to either place the needed graphics by the following two commands. • By Catalog Viewer • By Part Number



Option/Re-Option -	This command allows the user to either select options for symbols that were placed or select new options (ex. Fabrics and finishes for various parts)
3D Menu -	This option gives the user the following 3D commands and functions: • DDVPoint • 3DOrbit • Isoplane • Plan • Hide • Shade • 2Dto3D • ChangeZ • Plot3D 
Replace -	This command gives you the options to replace one or more symbols with another symbol.
SIF out -	Generates a SIF file of the selected symbols.
Make Special -	Allows the making of a custom part that is not part of the standard product line.
Change MFG -	Changes the current manufacturer.
Plots -	This gives you options to plot either Texted or No-Texted plans based on: • Panel Plan • Component Plan • Electrical Plan • All Plan • General Plan
Tags -	This allows you to Tag objects by: • Set Tag1 & Tag2 • Tag by Selection

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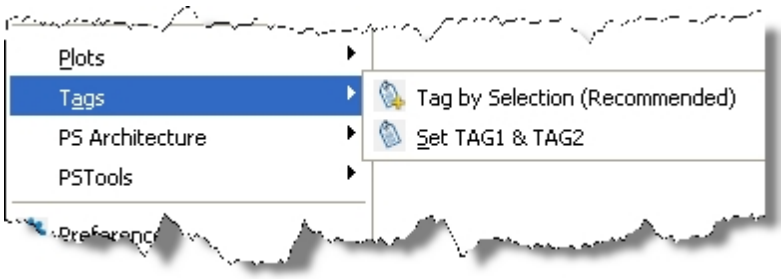
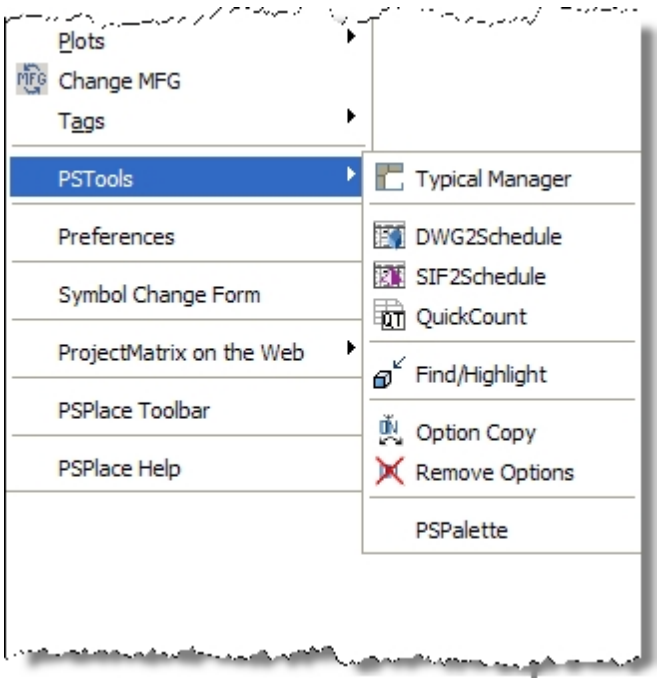
	This allows you to Tag objects by: • Set Tag1 & Tag2 • Tag by Selection 
PSTools -	This allows you access to more PSPlace Tools: • Typical Manger • Schedules o from Drawing Selection o from SIF File • Quick Count • Find & Highlight • Option Copy • Option Remove • PSPalette Side-Bar 
Preferences -	Changes PSPlace settings.

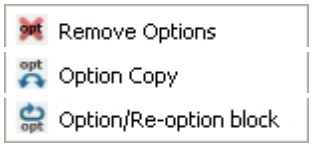
Sub-menus

Insert Submenu

Insert Submenu

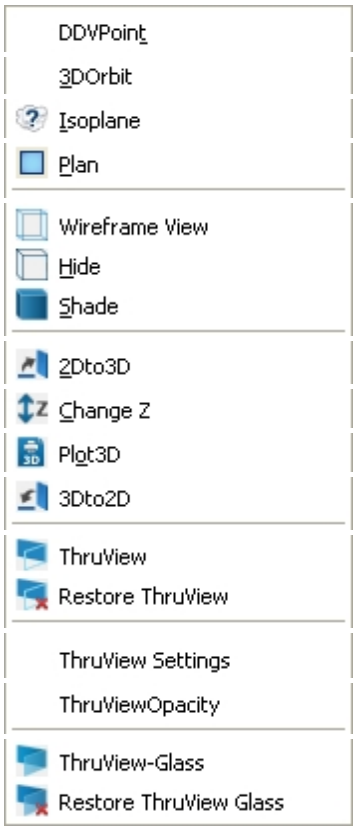
Block Options Submenu

Block Options Submenu



3D Submenu

3D Submenu



Plots

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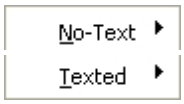
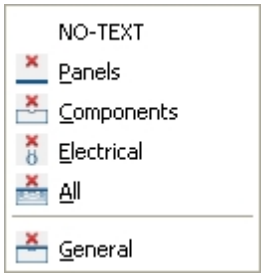
Plots



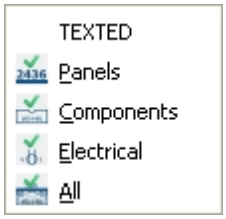
No-Text

No-Text



Texted

Texted



Tags

Texted

PS Architecture

PS Architecture

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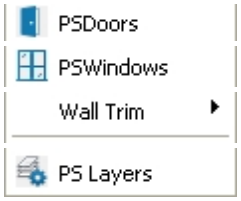
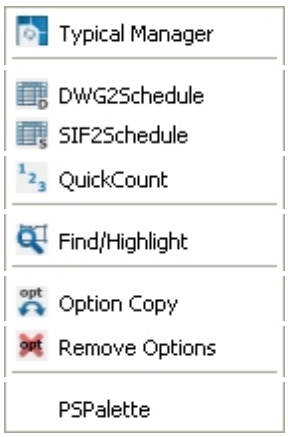
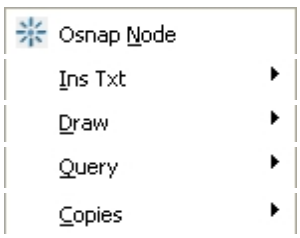


Wall Trim

PS Tools



Utilities Menu



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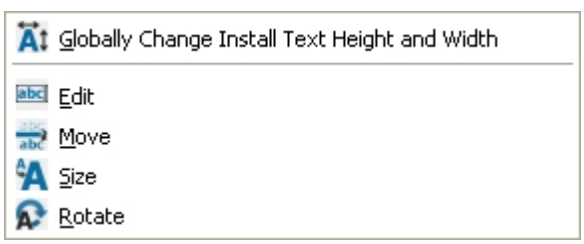
Sub-menus

Install Text



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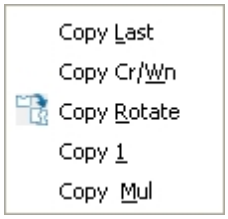
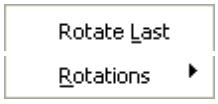
Draw

Query

Copies



Rotation



Rotations

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0
15
30
45
60
75
90
105
120
135
150
165
180
195
210
225
240
255
270
285
300
315
330
345

Moves

Move Cr/Wn
Move Rotate
Move 1

Erases

Erase Cr/Wn
Erase 1

Zooms

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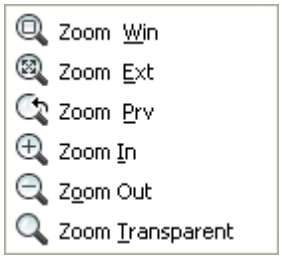
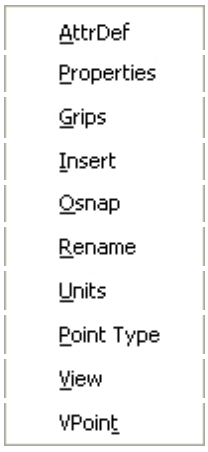


Layers

Dialogs



Attributes

Toolpaks

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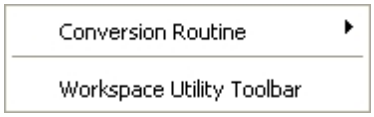
Toolpaks

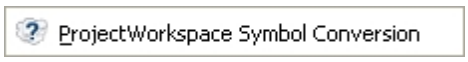
Workspace Utility

Workspace Utility



Conversion Routine

Conversion Routine



Ribbons

Ribbons

PSPlace Ribbon

ProjectSymbols Ribbon

The PSPlace Ribbon was introduced with AutoCAD versions 2009 & 2010. These are typically used instead of toolbars, but can also be used in conjunction with standard toolbars.

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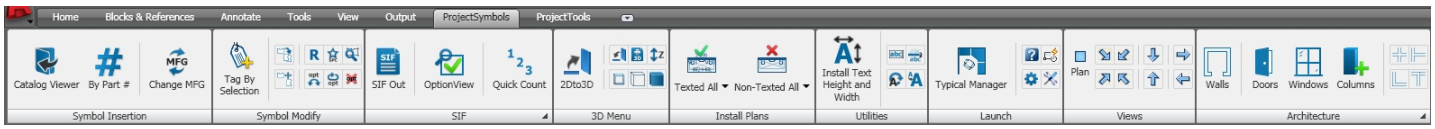


*NOTE: Ribbons and Toolbars are customizable. The "panels" can be turned on/off or be rearranged. Therefore your Ribbons and Toolbars may vary slightly from the above images.

Ribbon Icons and Names

Symbol Insertion

- Place symbol by Catalog Viewer
- Place symbol by Part Number
- Change MFG

Symbol Modify

- Symbol Tagging
- Replace
- Find and Highlight
- Make Special
- Re-Option
- Option Copy
- Remove Options

3D Menu

- 2D to 3D
- Plot 3D
- 3D to 2D
- Change Z
- Hide/Shade - This toolbar has "Drop-down" menu associated with it

SIF

- SIF-out
- Quick Count
- OptionView

[Drawing Schedule](#)

[SIF Schedule](#)

Utilities

[Typical Manager](#)

[Settings](#)

[Preferences](#)

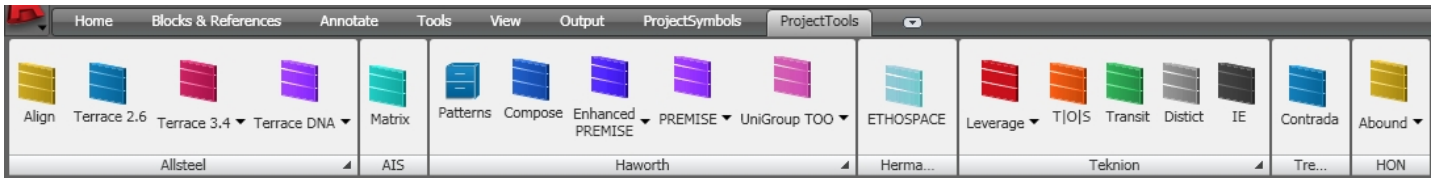
Install Plans

[Installation Plans](#) - This toolbar has "Drop-down" menu associated with it.

[Osnap Node](#)

ProjectTools Ribbon

The PSPlace Ribbon was introduced with AutoCAD versions 2009 & 2010. These are typically used instead of toolbars, but can also be used in conjunction with standard toolbars.



*NOTE: Ribbons and Toolbars are customizable. The "panels" can be turned on/off or be rearranged. Therefore your Ribbons and Toolbars may vary slightly from the above images.

Toolbars

PSPlace Toolbar

The PSPlace toolbar is the primary toolbar used in ProjectSymbols within AutoCAD. The table below contains all the buttons available via the toolbar. For each button, to the left is a representative graphic of the button. To the right is the button's name in bold type. Each button name is linked to additional information about this command. Click on the name to go to that help topic.

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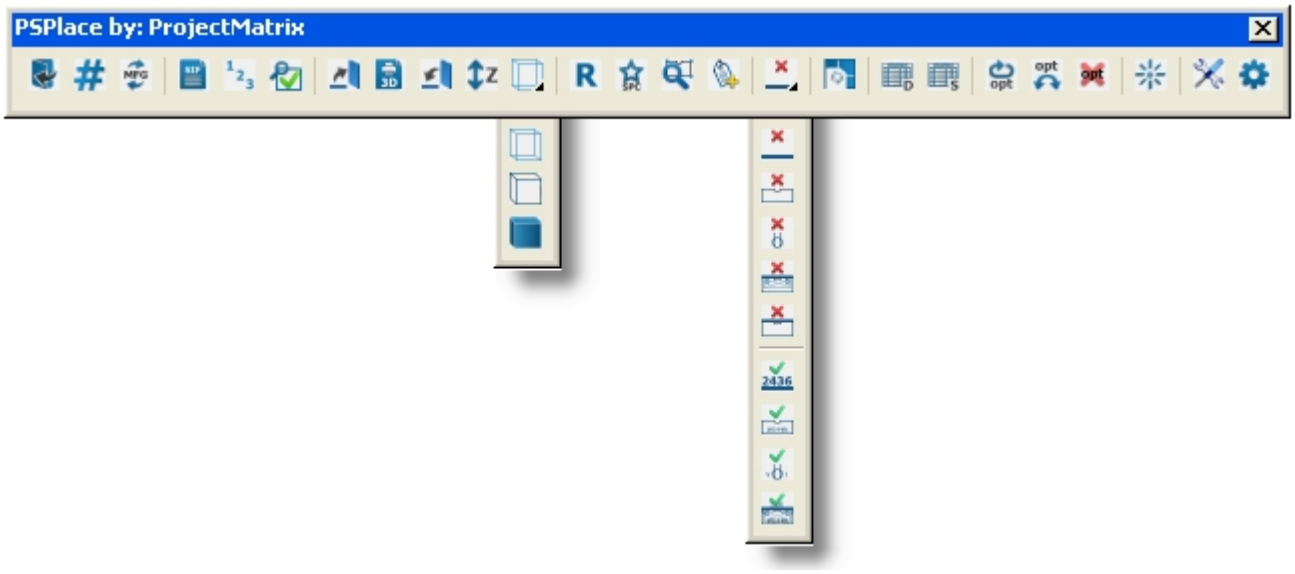


Toolbar Icons and Names

- **Place symbol by Catalog Viewer**
- **Place symbol by Part Number**
- **Change MFG**
- **SIF-out**
- **Quick Count**
- **OptionView**
- **2D to 3D**
- **Plot 3D**
- **3D to 2D**
- **Change Z**
- **Hide/Shade** - This toolbar has "Drop-down" menu associated with it
- **Replace**
- **Make Special**
- **Find and Highlight**
- **Symbol Tagging**
- **Installation Plans** - This toolbar has "Drop-down" menu associated with it.
- **Typical Manager**
- **Drawing Schedule**
- **SIF Schedule**

[Re-Option](#)

[Option Copy](#)

[Remove Options](#)

[Osnap Node](#)

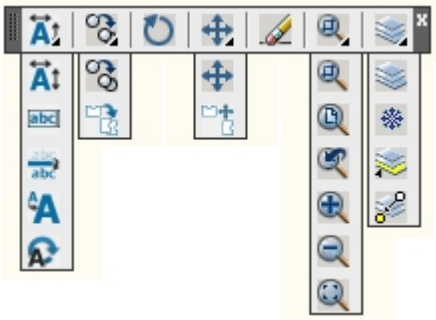
[Settings](#)

[Preferences](#)

Utilites Toolbar

PSUtilities Toolbar

The PSUtilities toolbar is a collection of tools used to help in the manipulation of symbol placement and drawing creation or modification. Some of the commands are provided as short-cuts to current AutoCAD commands. The table below contains all the buttons available via the toolbar. For each button, to the left is a representative graphic of the button. To the right is the button's name in bold type. Each button name is linked to additional information about this command. Link on this name to go to that help topic.



Toolbar Icons and Names

Change Install Text - This toolbar has "Drop-down" menu associated with it.

Copy and Copy Rotate - This toolbar has "Drop-down" menu associated with it.

Rotate

Move and Move Rotate - This toolbar has "Drop-down" menu associated with it.

Erase

Zoom Commands - This toolbar has "Drop-down" menu associated with it.

Layer Controls - This toolbar has "Drop-down" menu associated with it.

PSPlace Commands

Name: Catalog Viewer
Typed Command: **PSPLACE**
Description: Opens a manufacturers electronic catalog for placement of symbols.

Name: Part Number
Typed Command: **PN**
Description: Places the appropriate symbol by entering the manufacturers part number.

Name: ViewOptions
Typed Command: viewoptions
Description: Opens details for a block showing catalog data for that block. Also allows you to edit tags, and install text.

Name: Change MFG
Typed Command: **MFG**
Description: Changes the current manufacturer.

Name: Option/Re-Option
Typed Command: na
Description: Option a block.

Name: Change Z
Typed Command: **CHANGEZ**
Description: Adjusts the Z height of a symbol.

Name: 2Dto3D
Typed Command: **2DTO3D**
Description: Coverts 2D symbols to 3D symbols.

Name: 2Dto3D
Typed Command: **3DTO2D**
Description: Coverts 3D symbols to 2D symbols.

Name: Plot3D
Typed Command: **PLOT3D**
Description: Allows you to create a "block" of symbols in 3D view and insert into a plan view.

Name: Hide
Typed Command: **HIDE**
Description: Generates a hidden line view of 3D symbols.

Name: Shade
Typed Command: **SHADE**
Description: Generates a shaded view of 3D symbols.

Name: Replace
Typed Command: **REPLACE**
Description: Replaces a symbols with another symbol.

Name: Make Special
Typed Command: **SPECIAL**
Description: Allows the making of a custom part that is not part of the standard product line. You can also make typicals.

Name: Sifout
Typed Command: **SIFOUT**
Description: Generates a SIF file of the selected symbols.

Name: No Text Panel Plan
Typed Command: na
Description: Generate a panel plan with no text for installation.

Name: No Text Component Plan
Typed Command: na
Description: Generates a component plan with no text for installation.

Name: No Text Electrical Plan
Typed Command: na
Description: Generates a electrical plan with no text for installation.

Name: No Text All Plan
Typed Command: na
Description: Generates an all plan with no text for installation.

Name: No Text General Plan
Typed Command: na
Description: Generates a general plan with no text for installation.

Name: Texted Panel Plan
Typed Command: na
Description: Generates a panel plan with text for installation.

Name: Texted Component Plan

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Typed Command: na
Description: Generates a component plan with text for installation.

Name: Texted Electrical Plan
Typed Command: na
Description: Generates a electrical plan with text for installation.

Name: Texted All Plan
Typed Command: na
Description: Generates a all plan with text for installation.

Name: Osnap Mode ON/OFF
Typed Command: na
Description: Sets your running osnap to node.

Name: Set TAG1 & TAG2
Typed Command: **SETTAGS**
Description: Setting a tag allows you to tag symbols with information so when you do a SIFout they can be identified. All symbols placed after setting a tag will result in that the symbol will contain the set tag.

Name: Tag by Selection
Typed Command: **TAGBYSEL**
Description: Will allow you to tag symbols by a selection after they have been placed in the drawing.

Name: Typical Manager
Typed Command: **PSTYP**
Description: Brings up the Typical Side-Bar Manager.

Name: Find & Highlight
Typed Command: **PSSELBLK**
Description: Allows user to find symbols in drawing by different criteria.

Name: Drawing to Schedule
Typed Command: **PSDWG2SCH**
Description: Creates a schedule in the drawing based off of selected blocks.

Name: SIF to Schedule
Typed Command: **PSSIF2SCH**
Description: Creates a schedule in the drawing based off of a saved SIF file.

Name: Quick Count
Typed Command: **QUICKCOUNT**
Description: Provides a quick sortable grid based on selected symbols.

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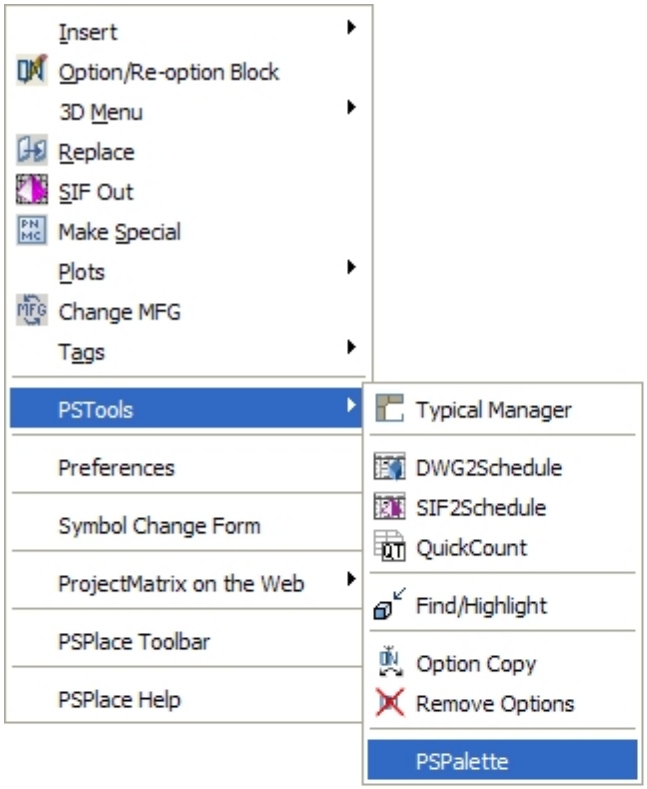
PS Palette

The PS Palette is a sidebar palette that can be placed in your workspace by going to the PSPlace menu. It can be used in association with or in replacement of the standard PSPlace toolbars.



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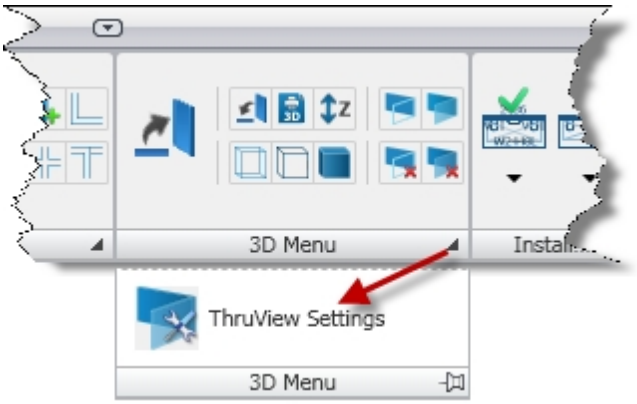
Program Commands

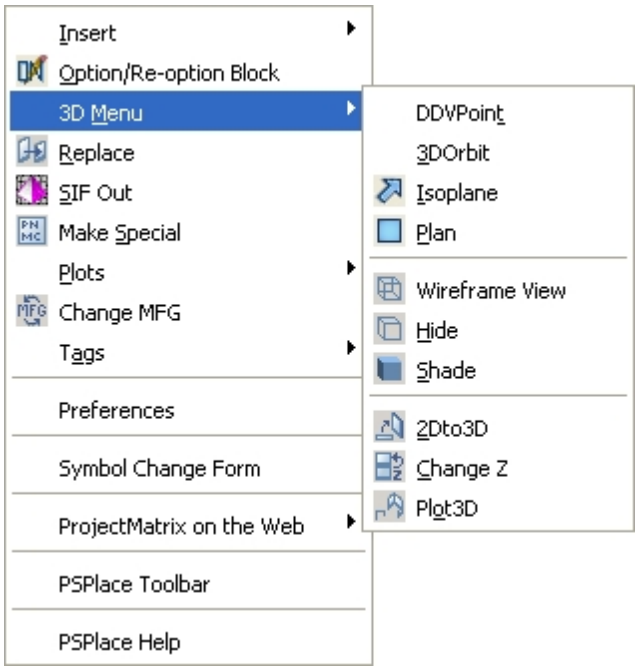
PSPLACE MENU

UTILITIES MENU

3D Menu

3D Menu



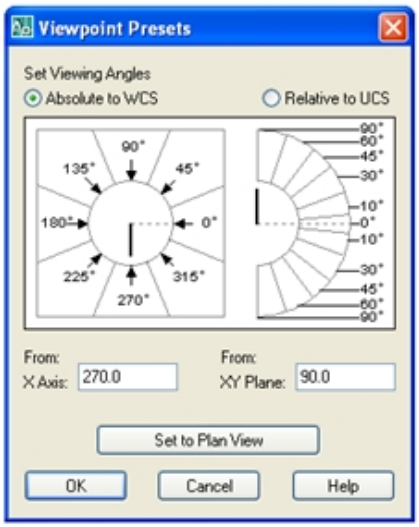


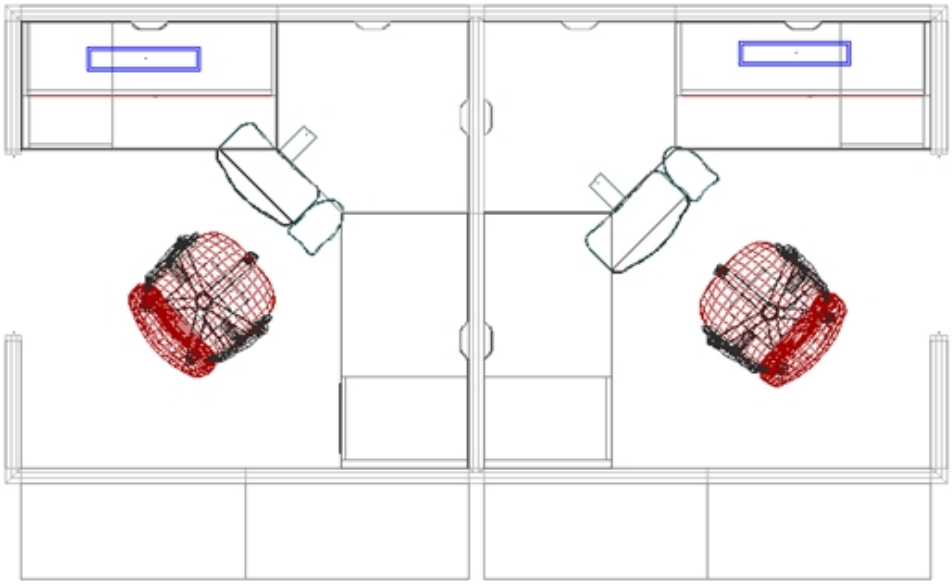
This option gives the user the following 3D commands and functions:

- **DDVPoint**
- **3DOrbit**
- **Isoplane**
- **Plan**
- **Wireframe View**
- **Hide**
- **Shade**
- **2Dto3D**
- **ChangeZ**
- **Plot3D**

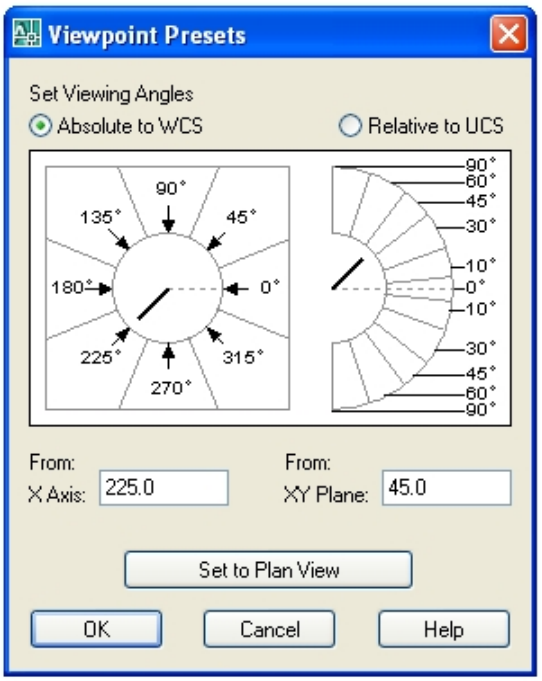
DDVPoint

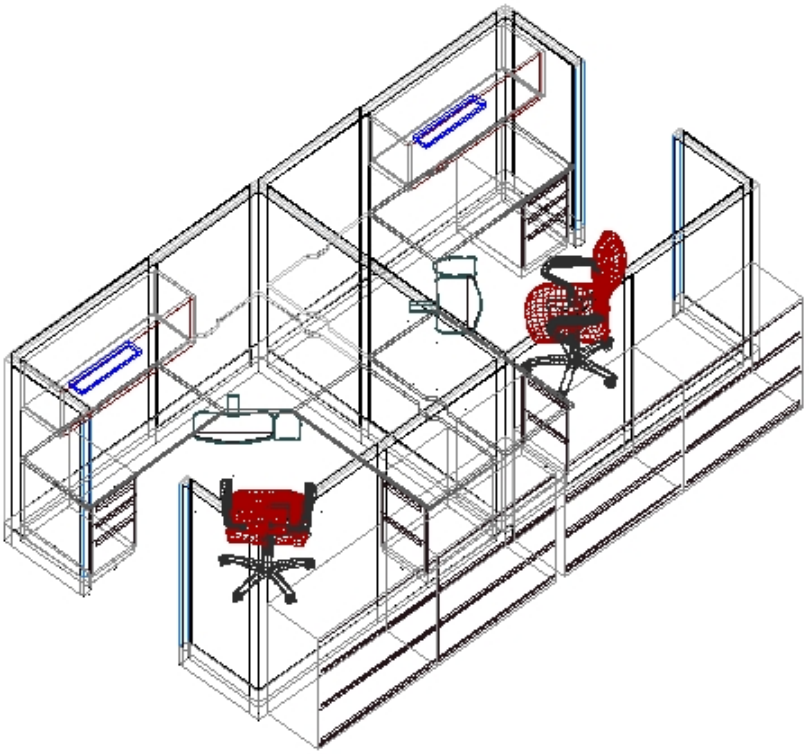
This command is accessed through the PSPlace pull-down menu and then 3D menu.





DDVPoint allows you to set the viewing angle relative to the World Coordinate System (WCS) or a User Coordinate System (UCS).





Isoplane

Isoplane

This command is accessed through the PSPlace pull-down menu and then 3D menu.

Isoplane- Shows the 3D in the Southwest Isometric plane.

3D Orbit

This command is accessed through the PSPlace pull-down menu and then 3D menu.

3D Orbit- Moves around a target. The target of the view stays stationary while the camera location, or point of view, moves. The center of the viewport, not the center of the objects you're viewing, is the target point.

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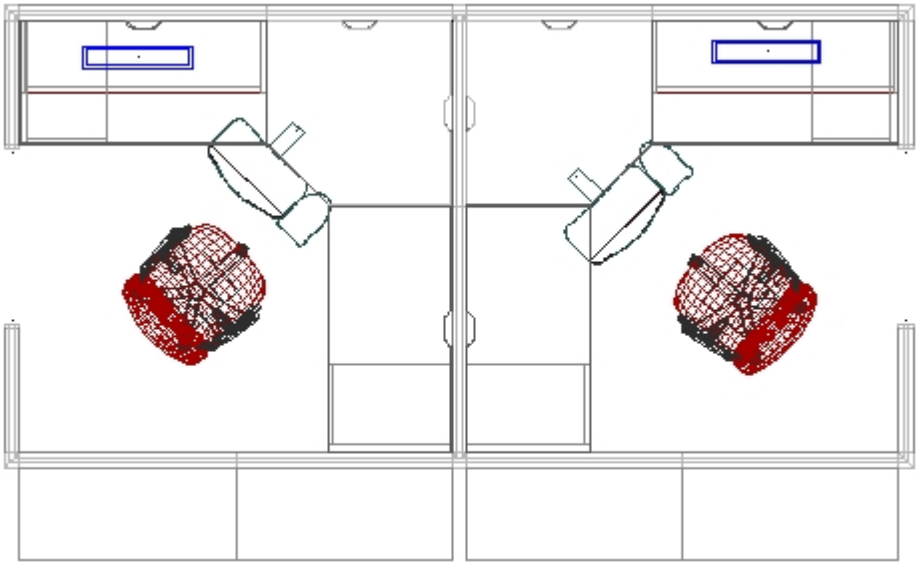
Plan

This command is accessed through the PSPlace pull-down menu and then 3D menu.

Plan- Shows 3D drawing from a 2D plan view.

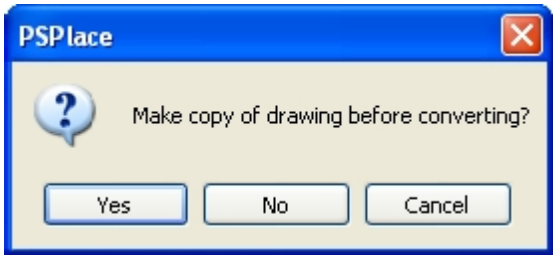


2D to 3D

Converting Symbols to 3D

Converting symbols to 3D has been made very simple in ProjectSymbols. This quick and easy utility in ProjectSymbols can make great presentation drawings to show to clients and provides great detail plans for installers.

The 2D to 3D command is fairly straight forward. Once the command is started you will be asked if you want to make a copy of the drawing before converting.



If you choose “Yes” the command will prompt you to select the symbols that you wish to convert. You will be prompted to select a base point and then a destination point. Then it will make a copy of the symbols and convert them to 3D in a location that you specify.

If you choose “No”, you will be given a warning box stating that you can not return to 2D with attributes and ask again if you would like to continue. If you say "Yes" to continuing, it will ask you to select the symbols you wish to convert.

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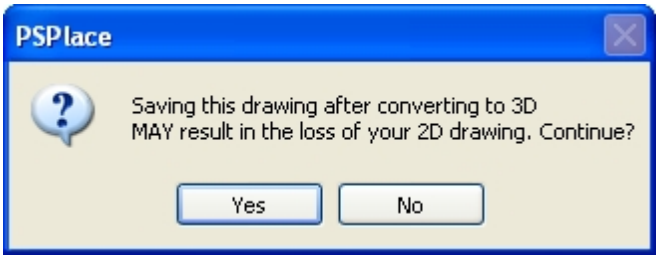

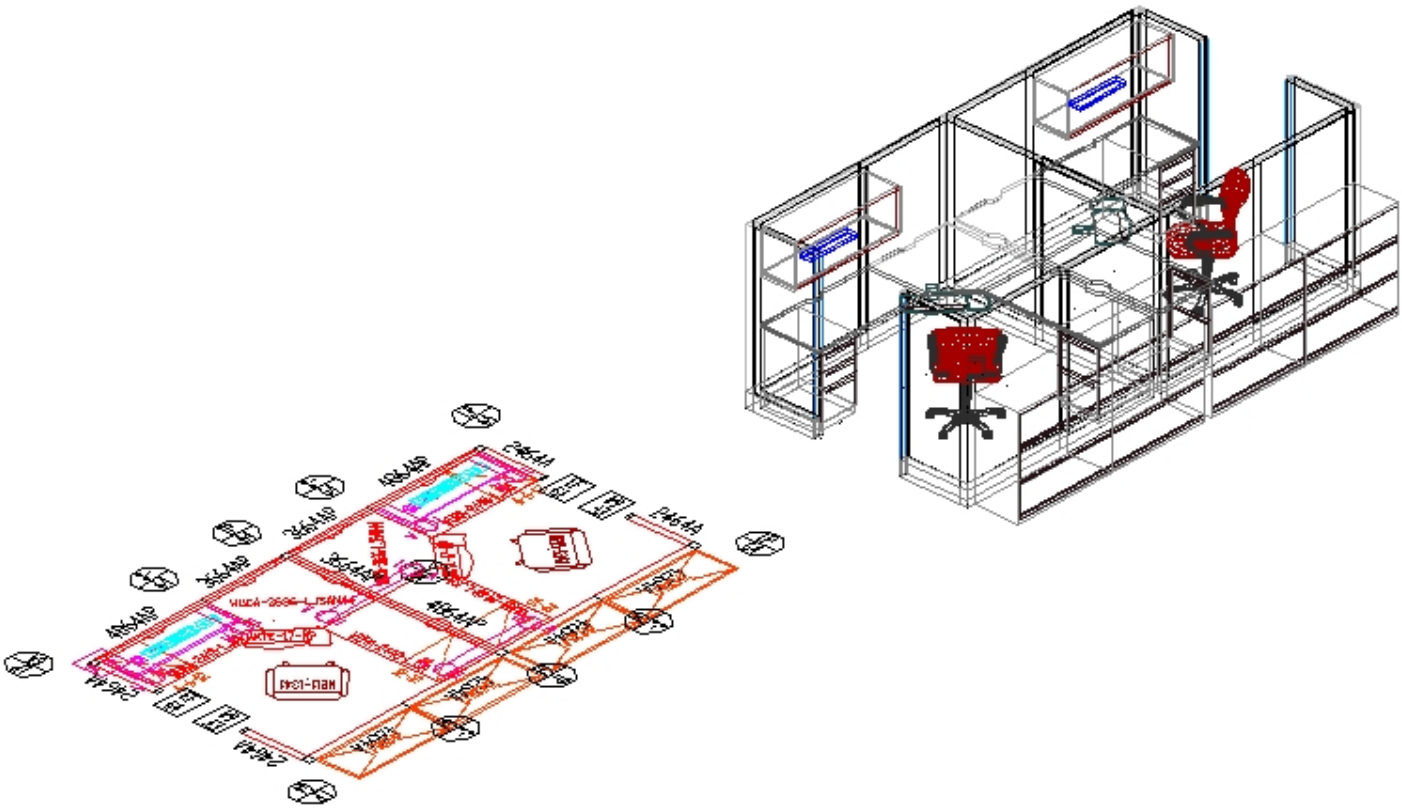

ProjectMatrix recommends that you make a copy before converting to 3D on a new drawing.

Troubleshooting...
If parts do not convert, check your active manufacturer by clicking on the Change MFG icon on your toolbar. Make sure that the active MFG is the same as what you are trying to covert.

Change Z

Change Z - Moving Symbols Vertically

Sometimes symbols need to be moved up or down in the Z-axis. For instance, if you are building a panel system the tiles will most likely come in on the floor. The best way to approach moving them up in the Z-axis is to use the “Change Z”

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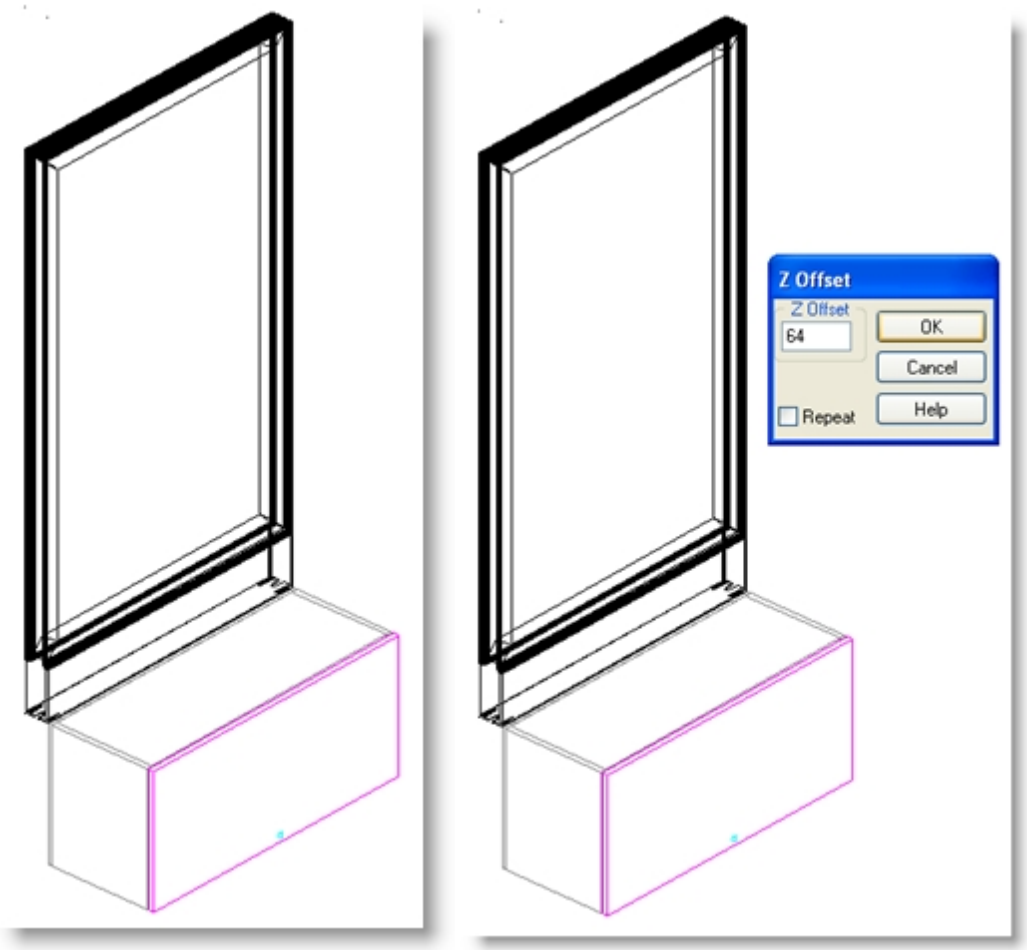
command.

Select the symbols that need to be moved in the Z-axis and press Enter. The Z Offset dialog box will appear.

- If you need to move the symbol(s) up type the amount in inches in the Z Offset dialog box. Ex. 64.0
- If you need to move the symbol(s) down type the amount in negative inches in the Z Offset dialog box. Ex. –64.0
- Checking the “Repeat” box will restart the “Change Z” command after the changes have been made.

Example:



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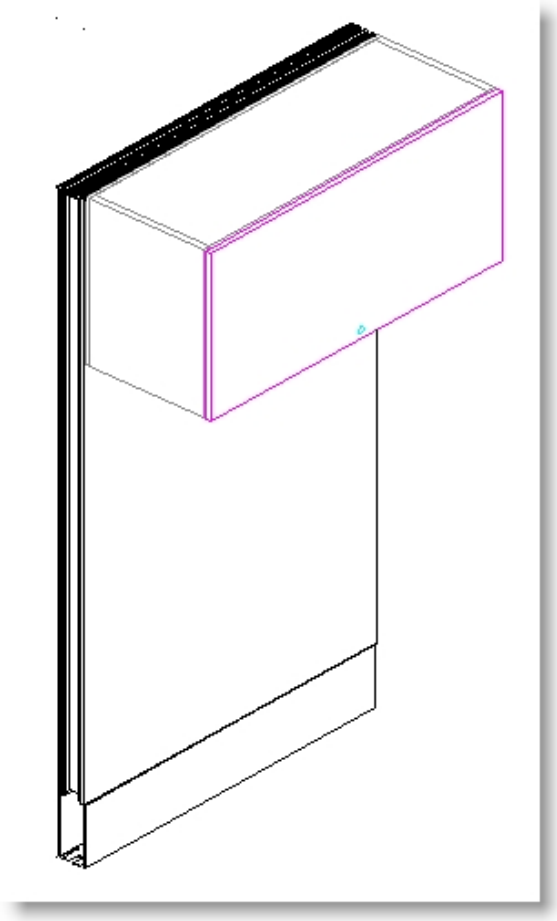
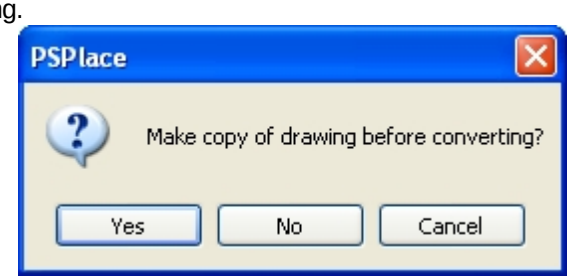


3D to 2D

Converting Symbols to 2D

In the Preferences Dialog you can choose to place new symbols in either 2D or 3D. We find that some product lines are easier to design with in their 3D form.
After you have finished placing the 3D symbols, you can convert your drawing to 2D for your space plan.

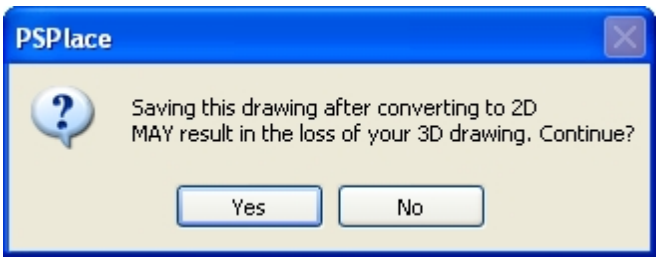
The 3D to 2D command is fairly straight forward. Once the command is started you will be asked if you want to make a copy of the drawing before converting.



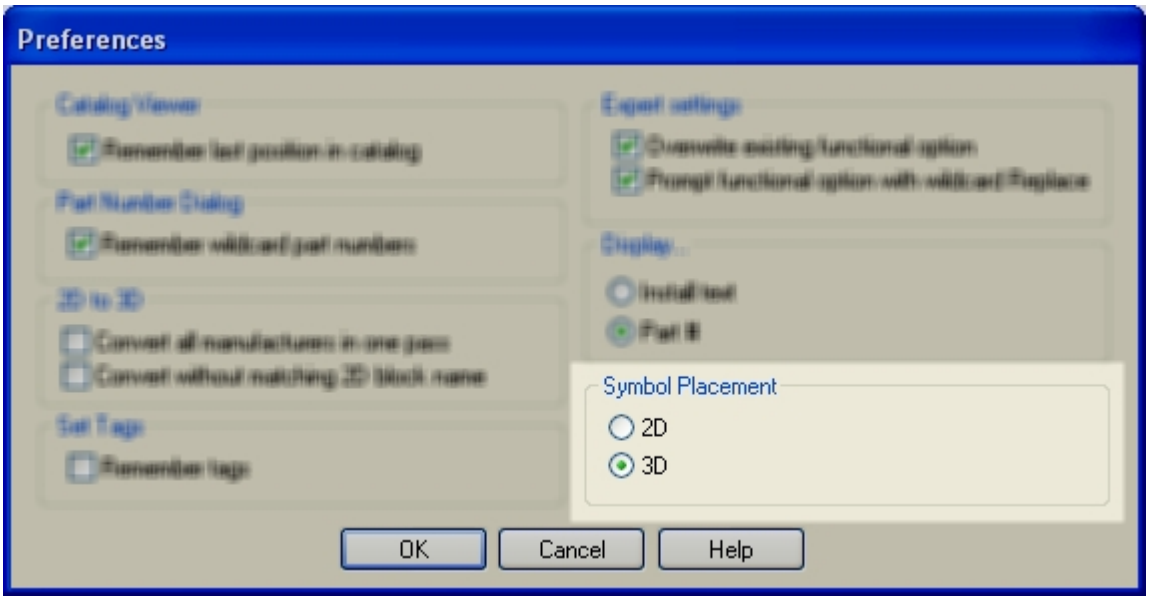
If you choose “Yes” the command will prompt you to select the symbols that you wish to convert. You will be prompted to select a base point and then a destination point. Then it will make a copy of the symbols and convert them to 2D in a

location that you specify.

If you choose “No”, you will be given a warning box stating that the 3D symbols will be deleted from the drawing. (You will still be able to run the standard 2D to 3D command later.) If you say "Yes" to continuing, it will ask you to select the symbols you wish to convert.



Preferences Dialog



Plot 3D

Plot 3D

The “Plot 3D” command allows you to create a “block” of symbols in 3D view and insert it into a plan view. This option will create a copy of the 3D group of symbols, so that you can place them into your plan view while leaving the originals unaffected.

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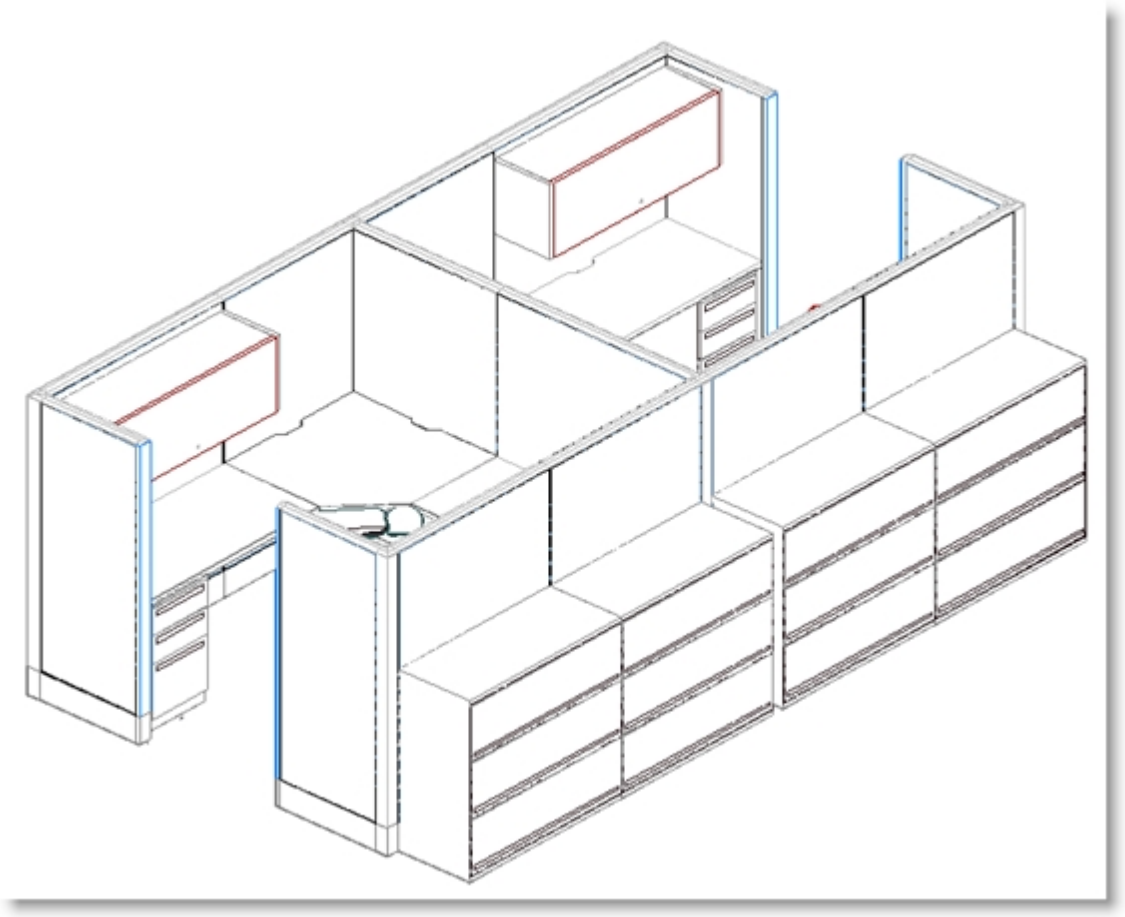
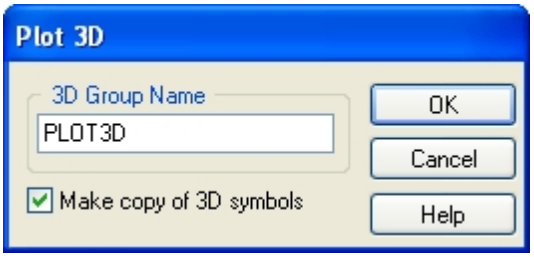
Choose a 3D view that suits your needs for your 3D Plot and run the 3D Plot command.



After the “Plot 3D” command is executed the Plot 3D dialog box will appear.



In this dialog box you will type in a name for your 3D Group. It is also important to make sure that the “Make a copy of the 3D symbols” checkbox is selected. After you hit the "OK" button, you will be asked to select or window the 3D drawing and then choose a base point. It is important to select a point on a symbol. After selecting the base point, the drawing will automatically return to a plan view and allow you to select the destination point of your 3D block.

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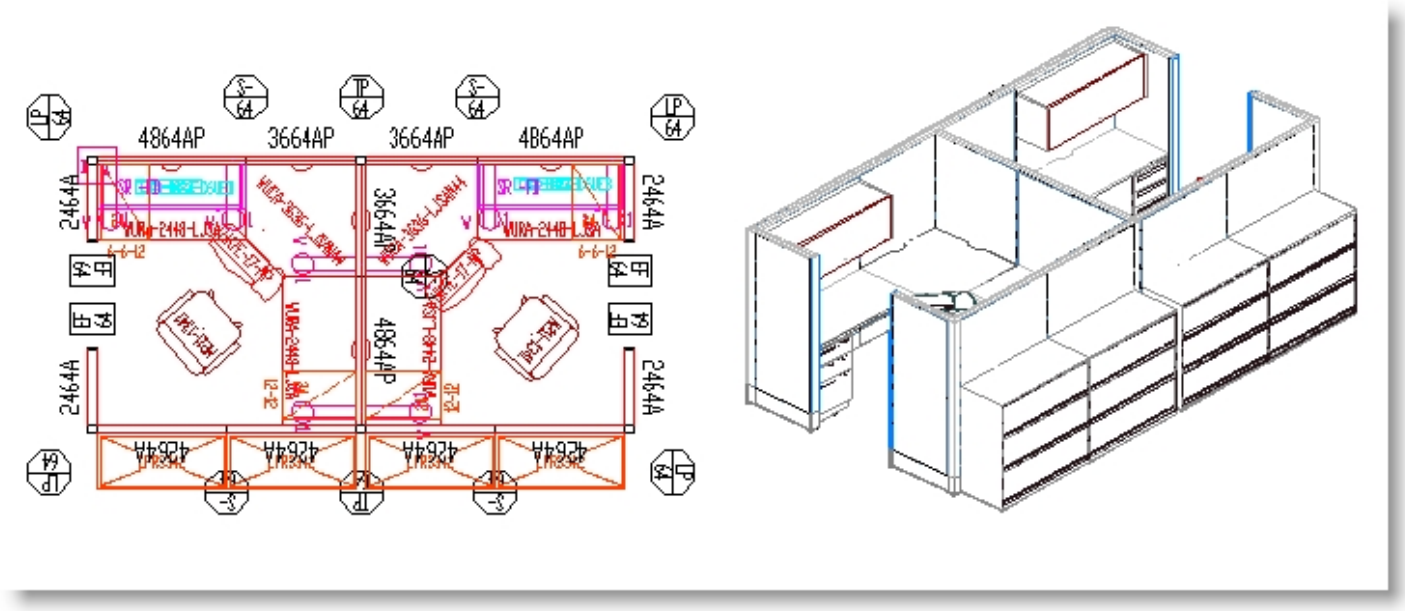

Hide/Shade

Hide & Shade

Wireframe/Hide/Shade

Hide - Displays the drawing in hidden line mode.
Shade - Displays the drawing in shade mode.

Wireframe View

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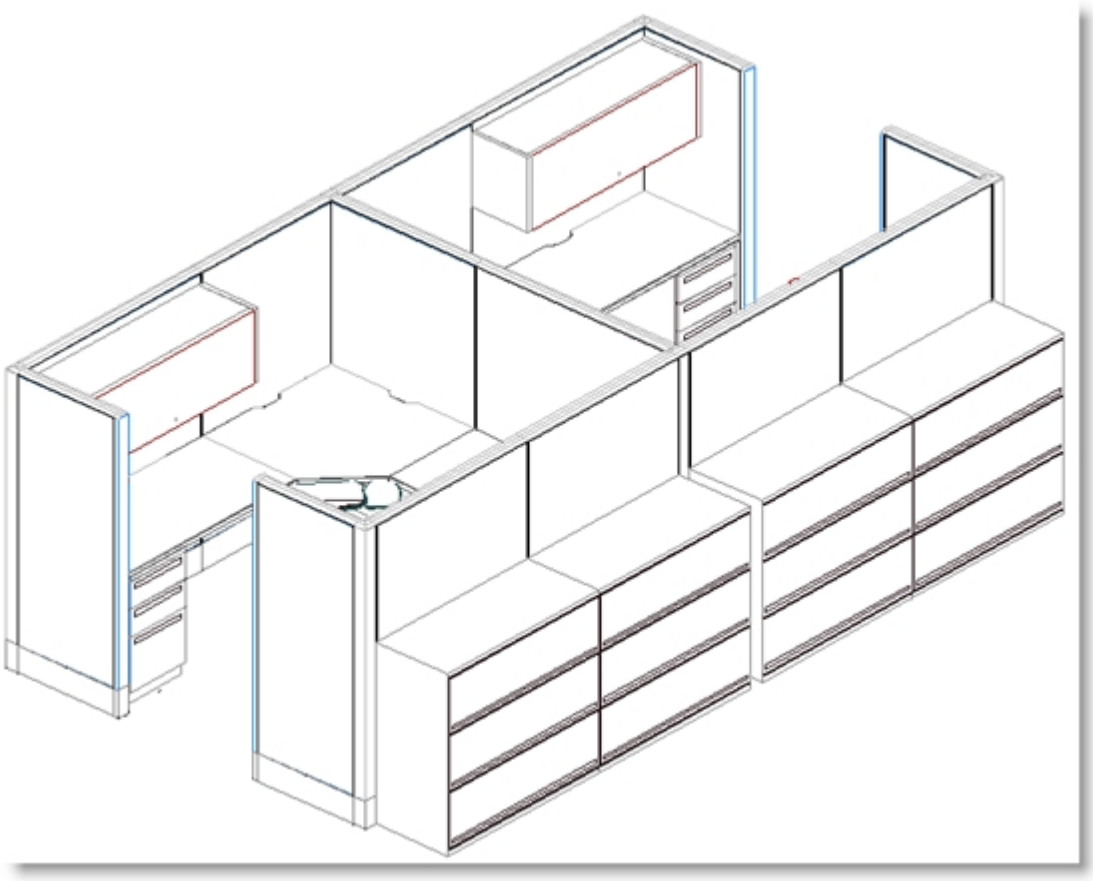
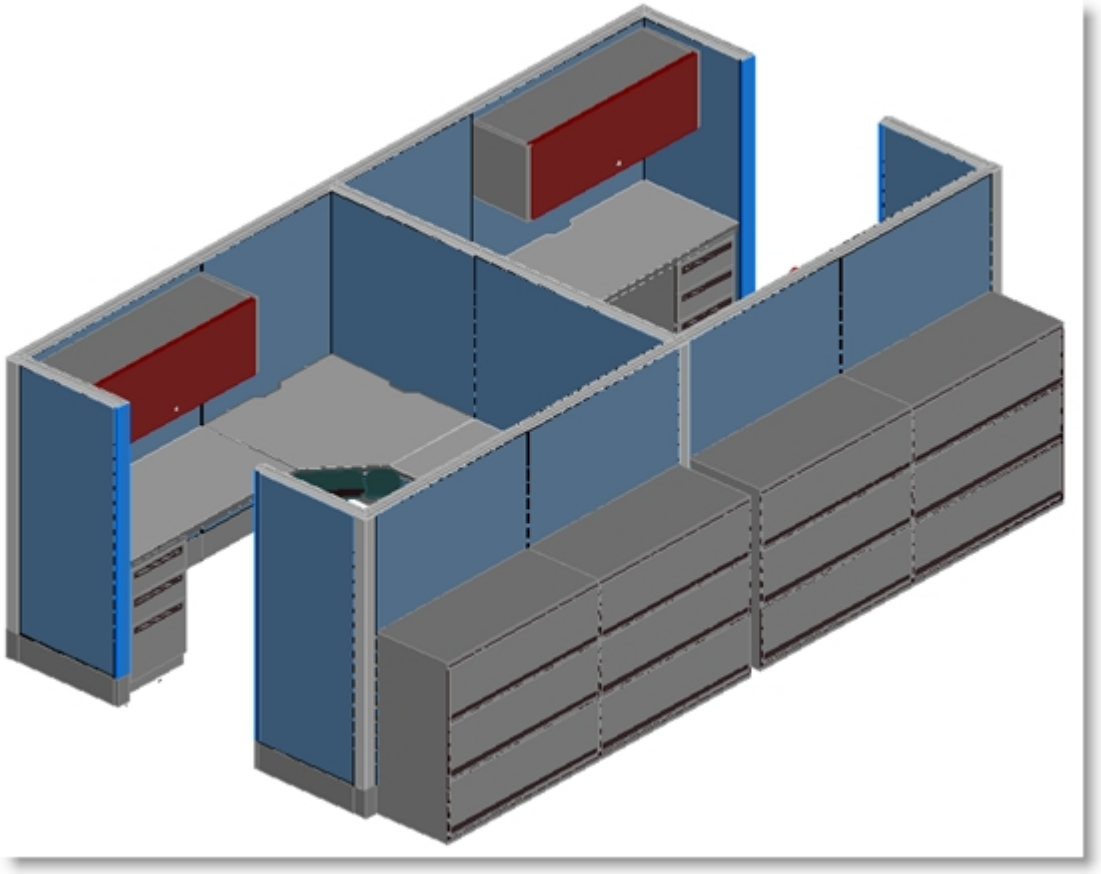
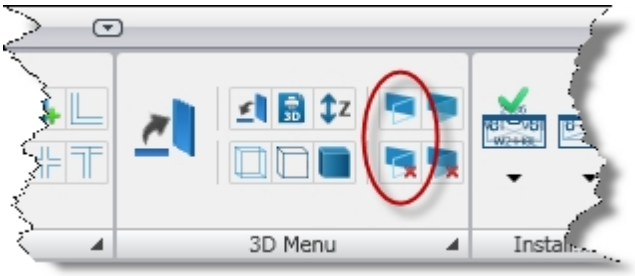
Hidden View

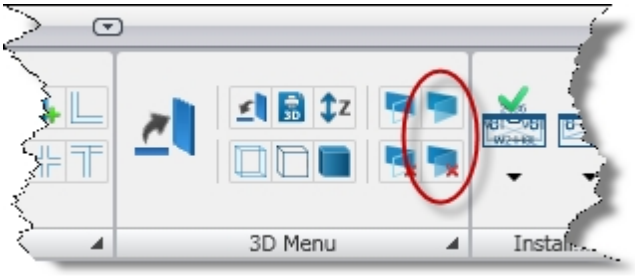


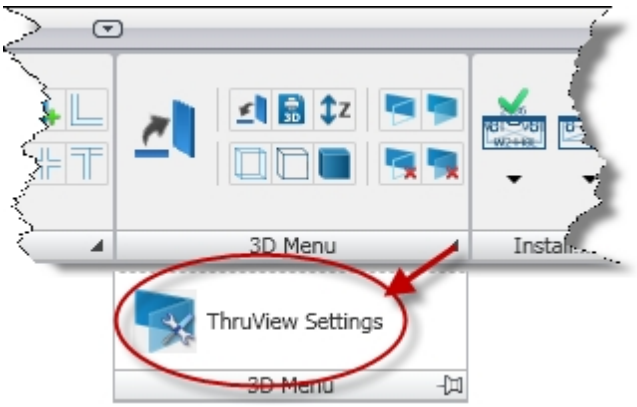
Shaded View



ThruView







ThruView Settings

ThruView Settings

ThruView Opacity

ThruView Opacity

3D Views

3D Views Toolbar

The 3D Views Toolbar allows you to view nine different preset views from one toolbar. Below is an example of each view for a Task Chair.

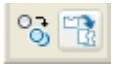
ACAD Tools

Attribute Definition

Attribute Definition

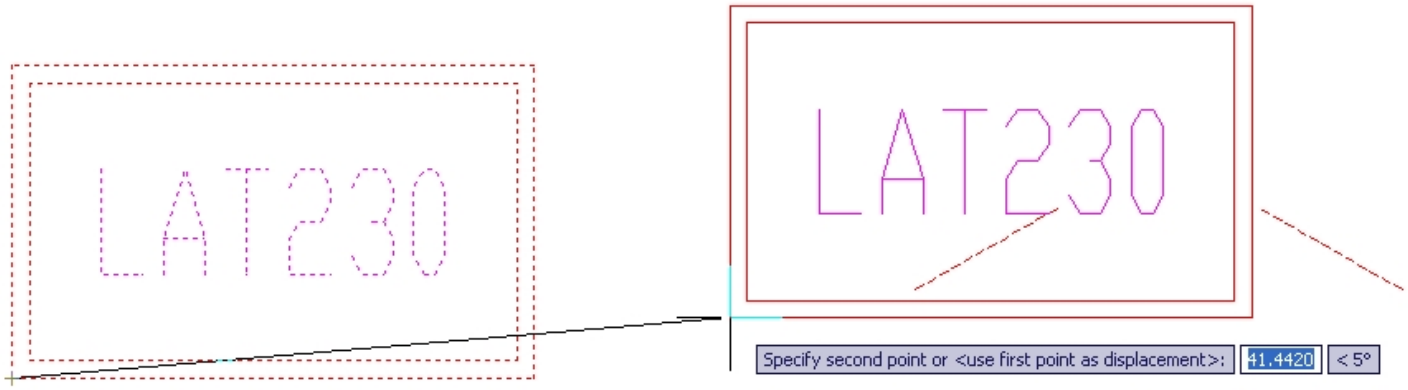
Copy

Copy & Copy/Rotate

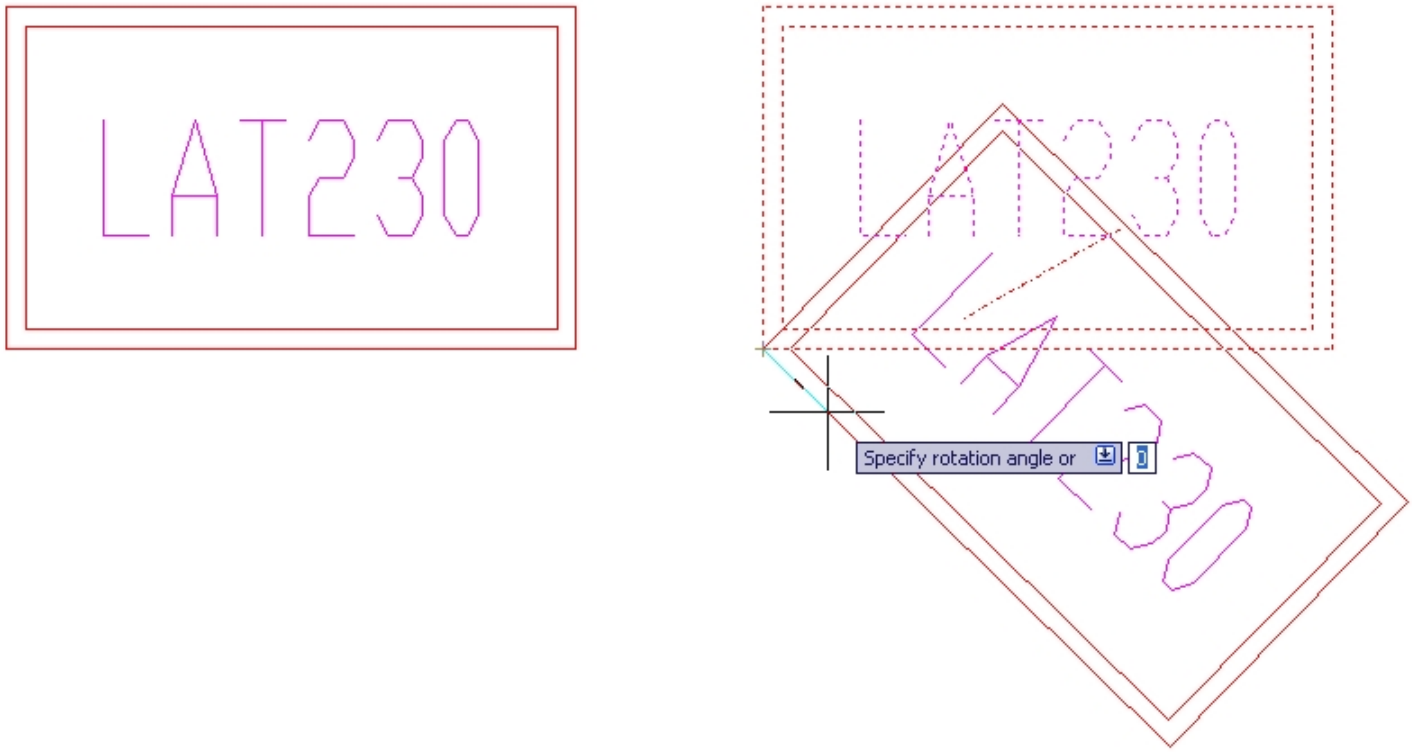


Using the Copy and Copy/Rotate commands

Copy- This is the same as the AutoCAD copy command. Select your block(s), pick a base point and then the destination point.



Copy/Rotate- This combines both the copy and the rotate command. The first steps will be the copy, once you select the destination point, you will be prompted for the rotation angle.



Draw

Draw

Edit Attributes

Edit Attributes

Erase

Erase

Grips

Grips

Inquiries

Inquiry

Insert

Insert

Layer Control

Layer Control

Layer Control

Display Layers – Displays the layer manager dialog box.

Freeze by Object – Freezes the current layer to whatever object you select was created on.

Current by Object – Sets the current layer to whatever object you select was created on.

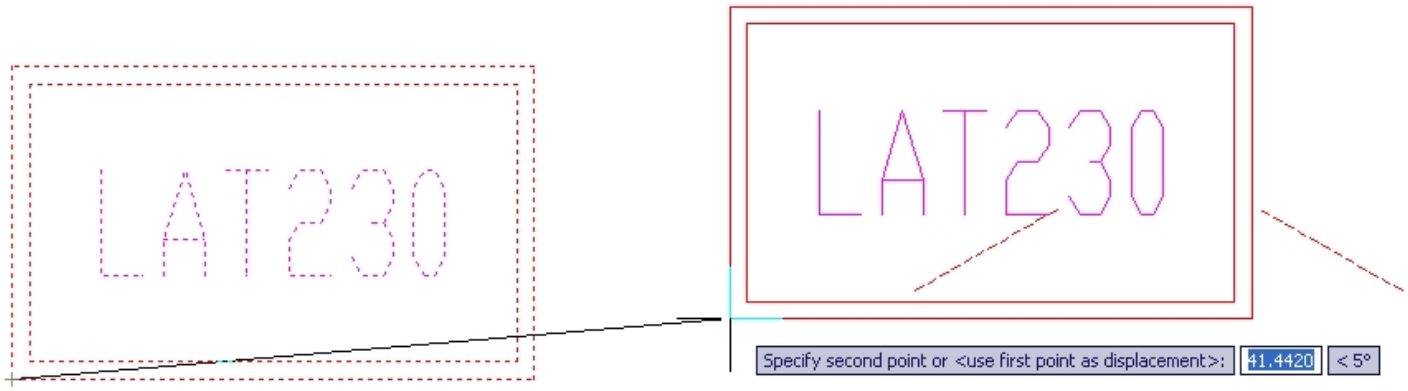
Change by Object – Changes the selected object's properties to whatever object you select.

Move

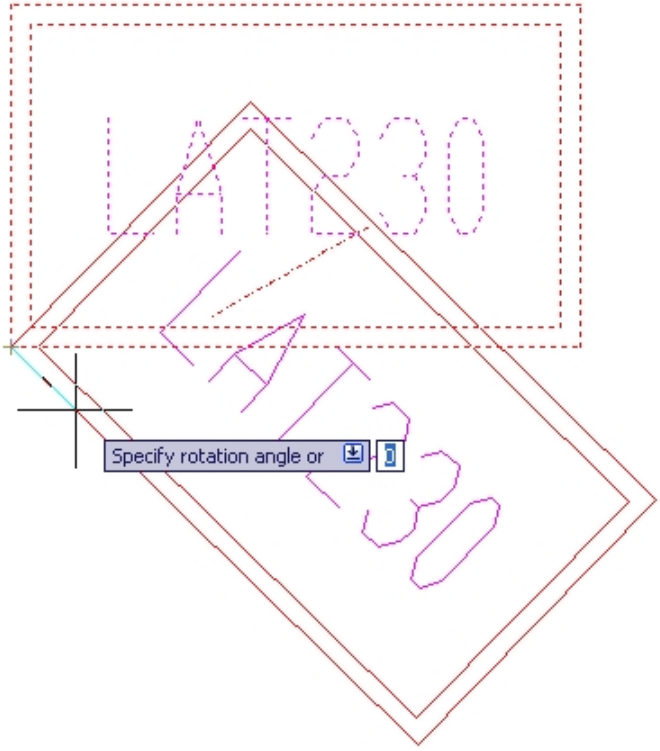
Move & Move/Rotate

Using the Move and Move/Rotate commands

Move- This is the same as the AutoCAD move command. Select your block(s), pick a base point and then the destination point.



Move/Rotate- This combines both the move and the rotate command. The first steps will be the move, once you select the destination point, you will be prompted for the rotation angle.



Osnap

OSnap

Node Snap

Use object snaps to specify precise locations on objects. When placing symbols from ProjectSymbols, it is recommended to use the NODE OSnap. Manufactures place NODES at locations on the symbols where they may be connected or joined with other symbols. For example there is a node at each corner of the work surface, and three NODES along the front edge. The standard location for the original insertion point on a symbol is the lower left corner of a symbol. Once placed you can move symbols by their NODES as well. The three NODES on the front may be used for snapping pedestals, keyboard trays, or other components.

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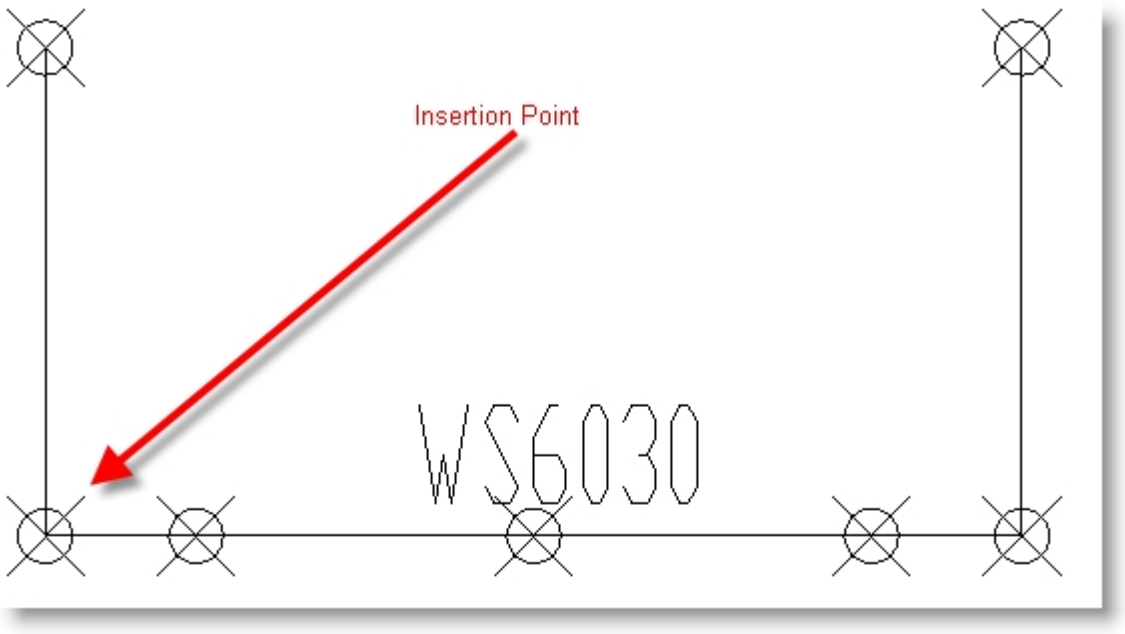
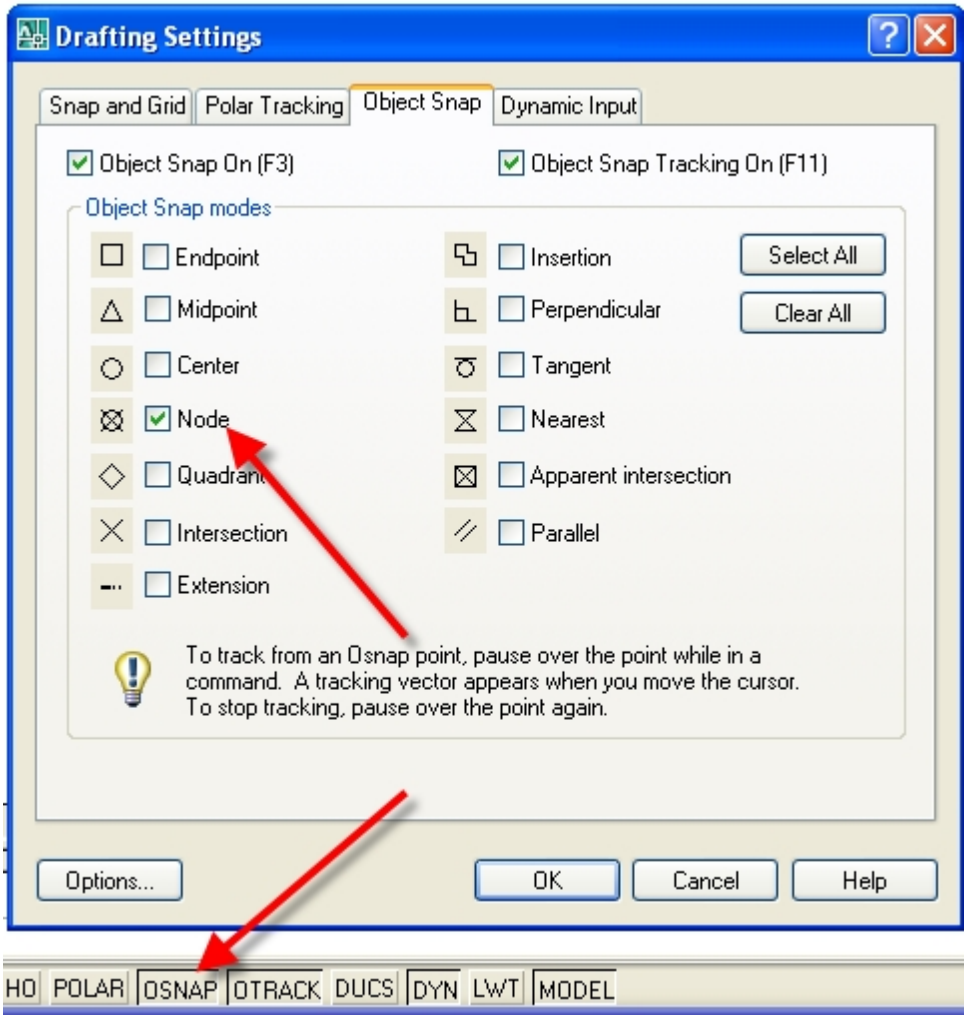


The "Node" snap can also be accessed by going to the OSNAP settings in the AutoCAD Tray Settings at the bottom of the screen.



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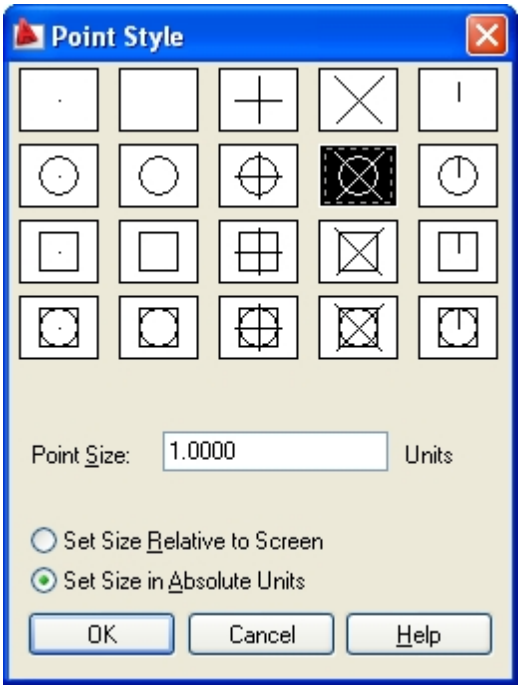
command:ddptype

or Format->Units



Point Style

Point Style

Properties

Properties

Rename

Rename

Rotate

Rotate

Units

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Units

View Manager

View Manager

Viewpoint Presets

Viewpoint Presets

Zoom

Zoom

Zooms

Zoom Win – Zooms to display an area specified by two opposite corners of a rectangular window.

Zoom Ext – Zooms to display the drawing extents. You can use ZOOM Extents transparently, but it always regenerates the drawing.

Zoom Prv – Zooms to display the previous view.

Zoom In – Increases the apparent size of objects in the current viewport.

Zoom Out – Decreases the apparent size of objects in the current viewport.

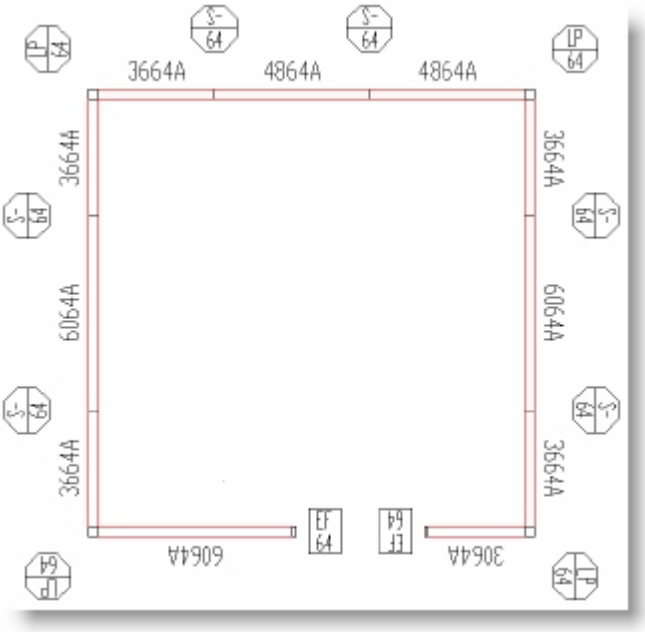
Zoom Transparent – Allows you to use the zoom command while another command is active.

Install Text Plan Options

Install Text Plots Introduction

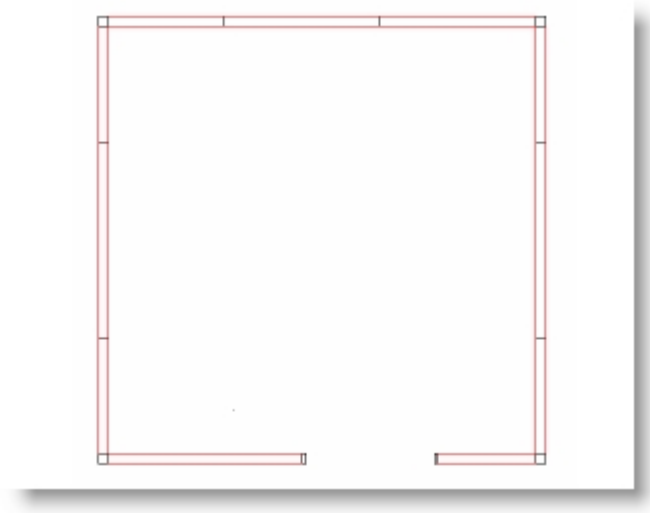
Install text plots are designed to improve the clarity of Installation drawings. By creating a set of drawings to display all the information we can control where the text and graphics are placed. Using a wide range of layer enables us to display only panels or just the components. Install Text Plots give you the ability to turn off and on certain symbol layers to generate clear instructions for an installer. You can create either a texted or a non-texted plan by pressing one button. In texted, meaning with text, you can make a panel plan, a component plan, an electrical plan, or you can do an all-texted plan. In non-texted, meaning no text, you can do the same as texted plus we have a general plan.

- **Texted Plans**



Example of a Texted Panel Plan

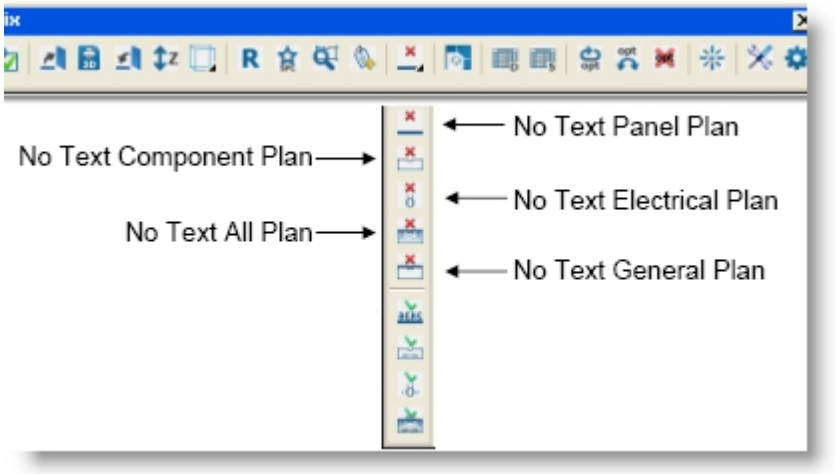
- **Non-Texted Plans**



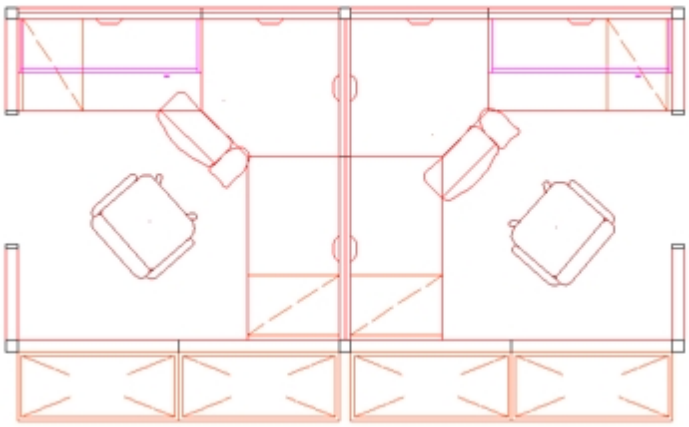
Example of a Non-Texted Panel Plan

No-Text Plans

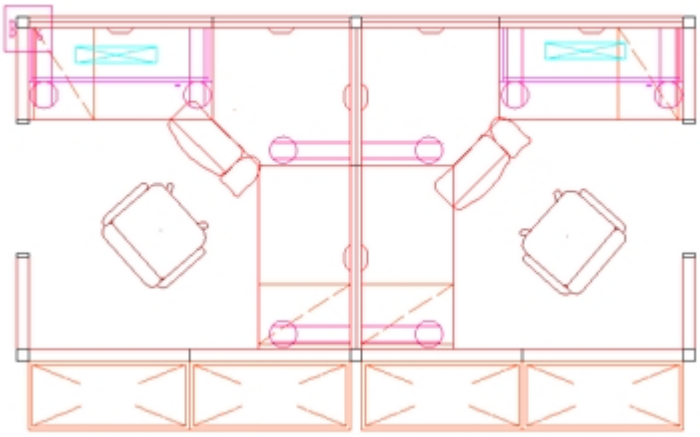
With Non-Texted plans, the panel symbols will always remain on as a point of reference for the installers. However, other symbols and text may be frozen or thawed to show only desired symbols.



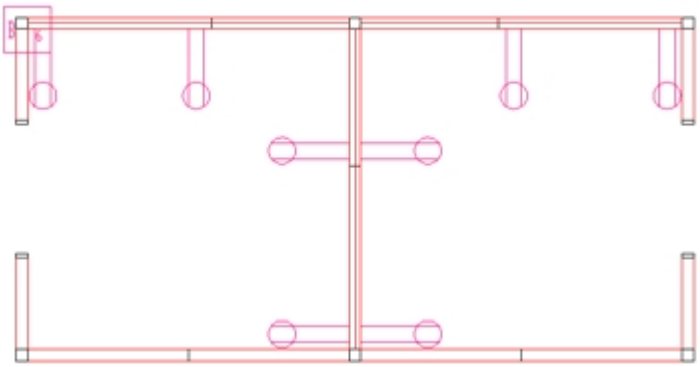
Simply by selecting one of the above options you can get the following results with the press of one button!



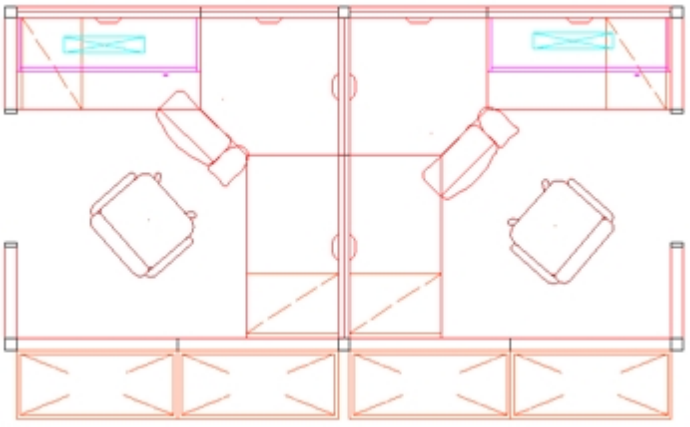
Non Texted General Plan



Non Texted All Plan



Non Texted Electrical Plan



Non Texted Component Plan

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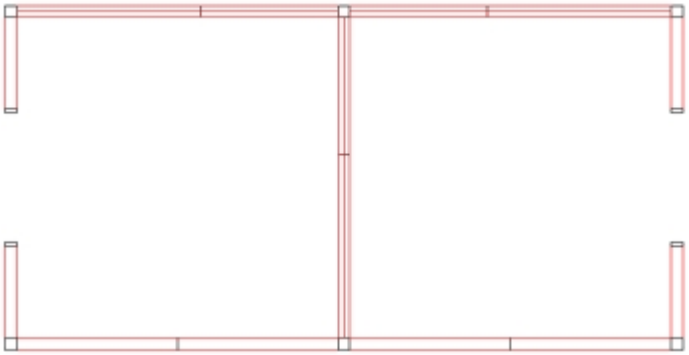
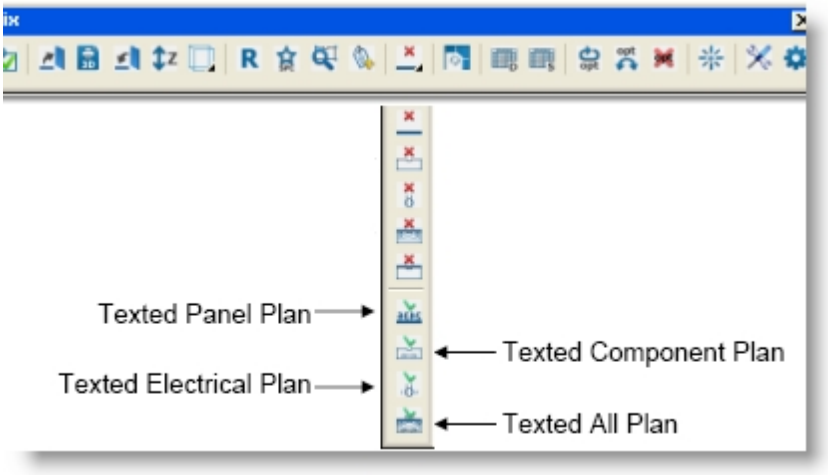


Non Texted Panel Plan

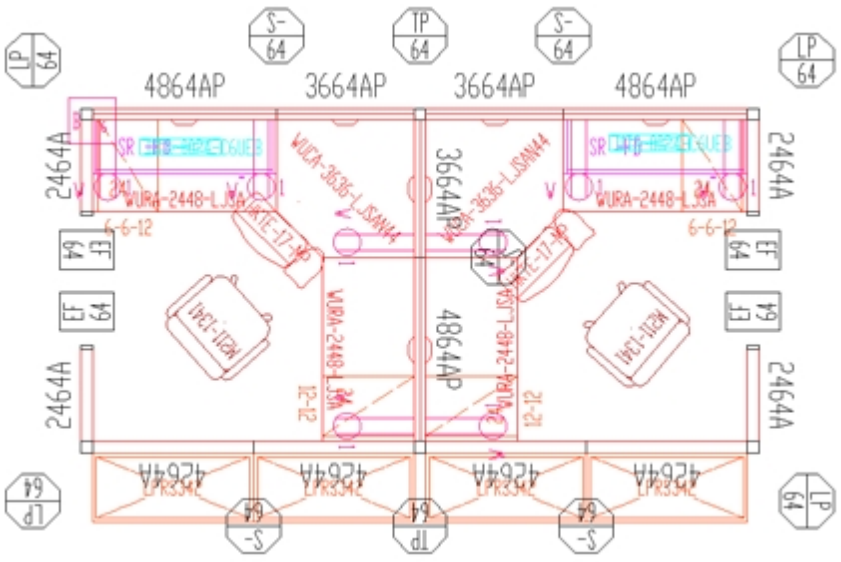
Texted Plans

Texted Plans

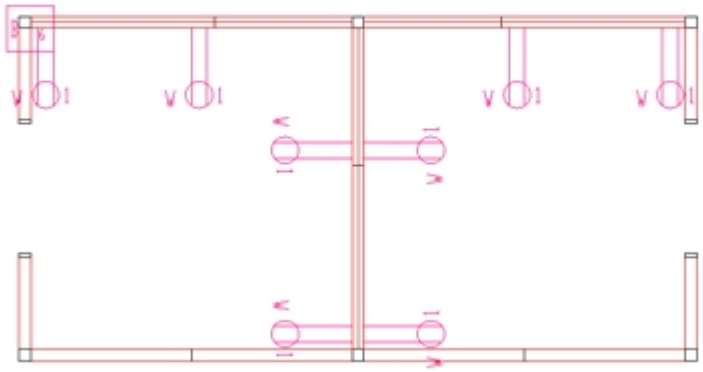
With Texted plans, the panel symbols will always remain on as a point of reference for the installers. However, other symbols and text may be frozen or thawed to show only desired symbols.



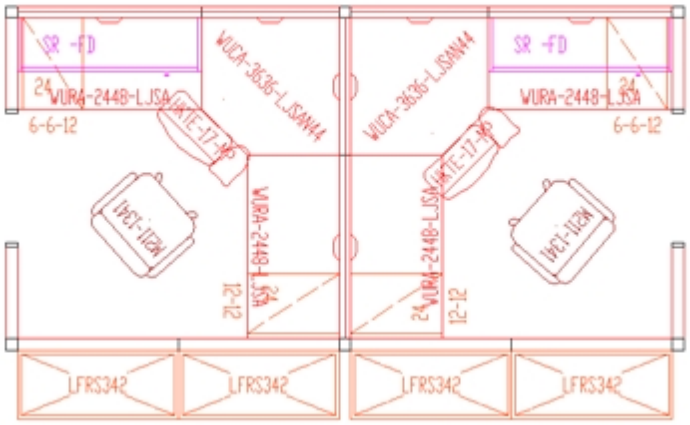
Simply by selecting one of the above options you can get the following results with the press of one button!



Texted All Plan



Texted Electrical Plan



Texted Component Plan

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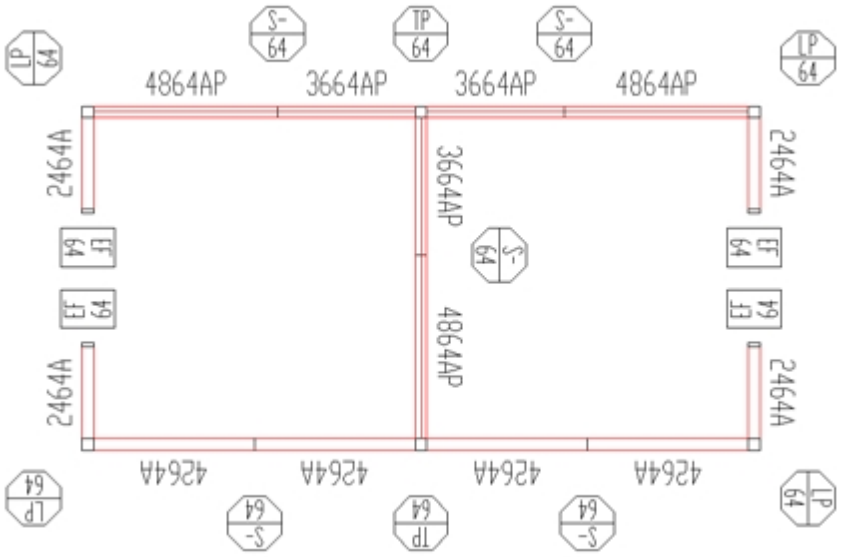
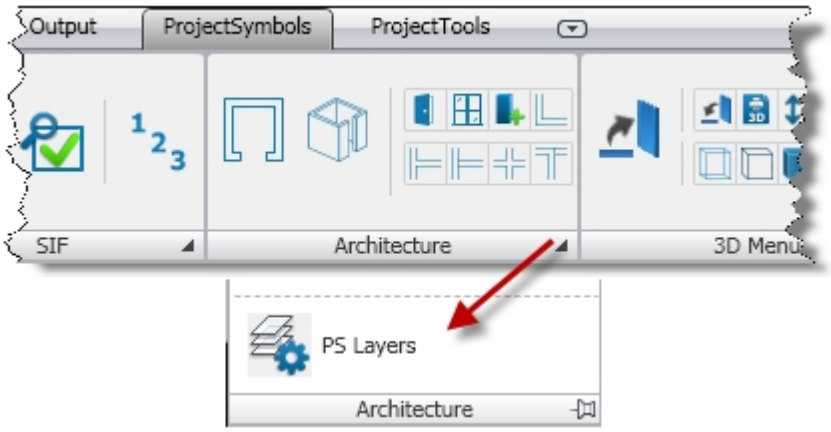


Texted Panel Plan

ProjectWorkspace

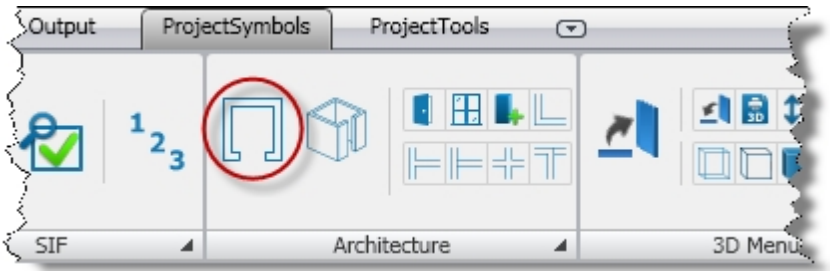
Architectural Tool

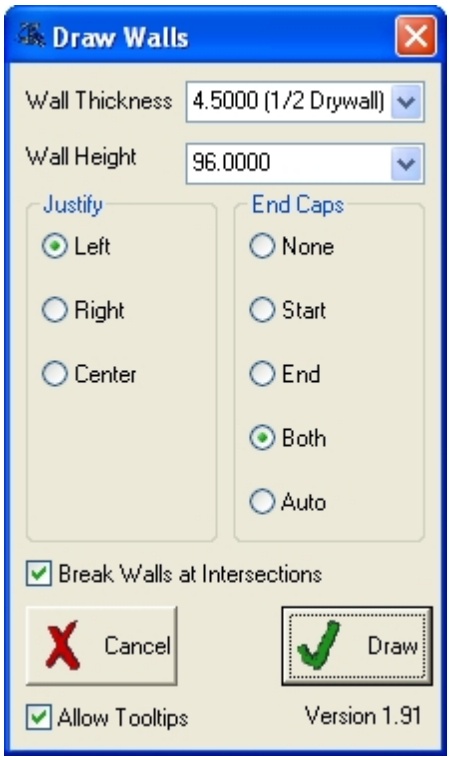
PS Architecture



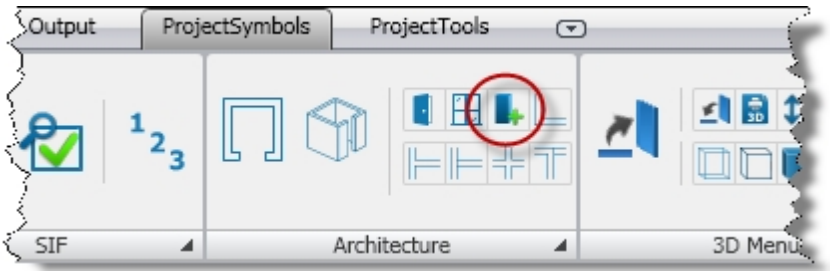
Walls

Architectural Walls





Columns



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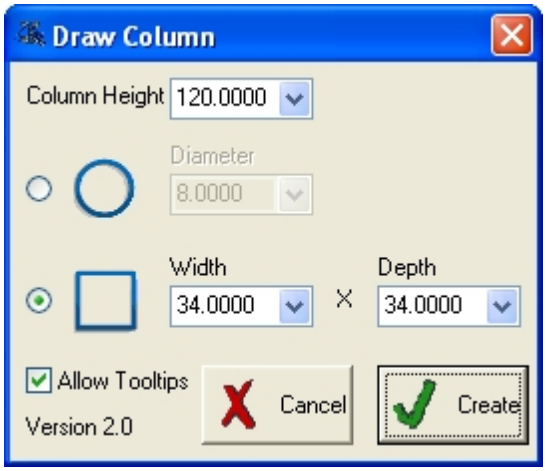
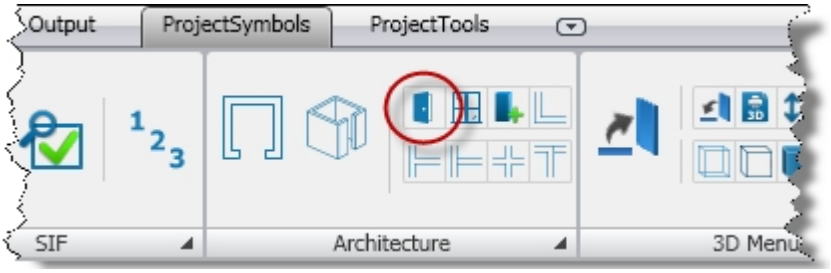
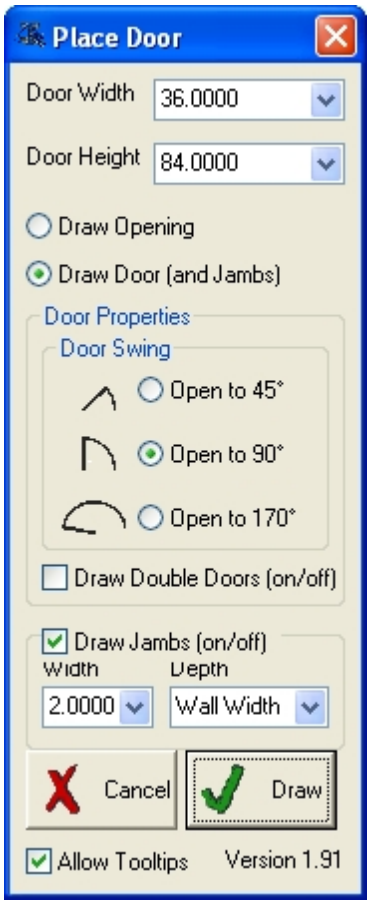


Doors

Architectural-Doors





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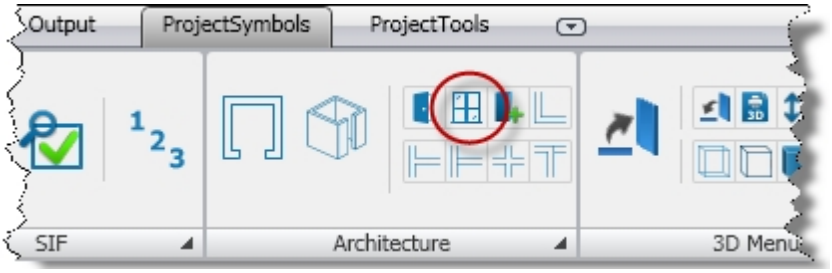
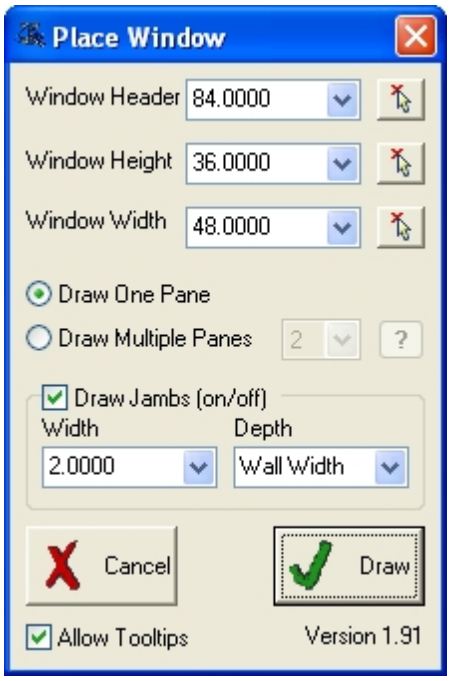
Windows

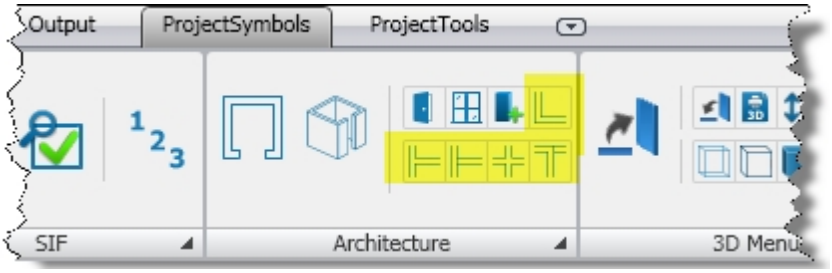
Architectural-Windows

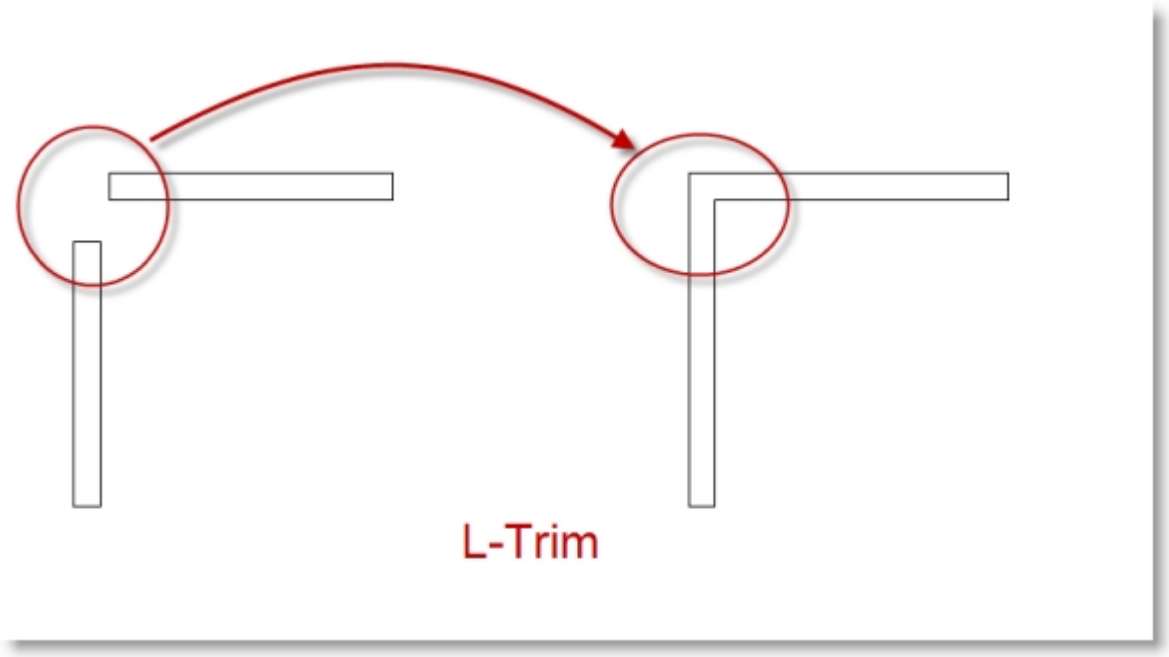


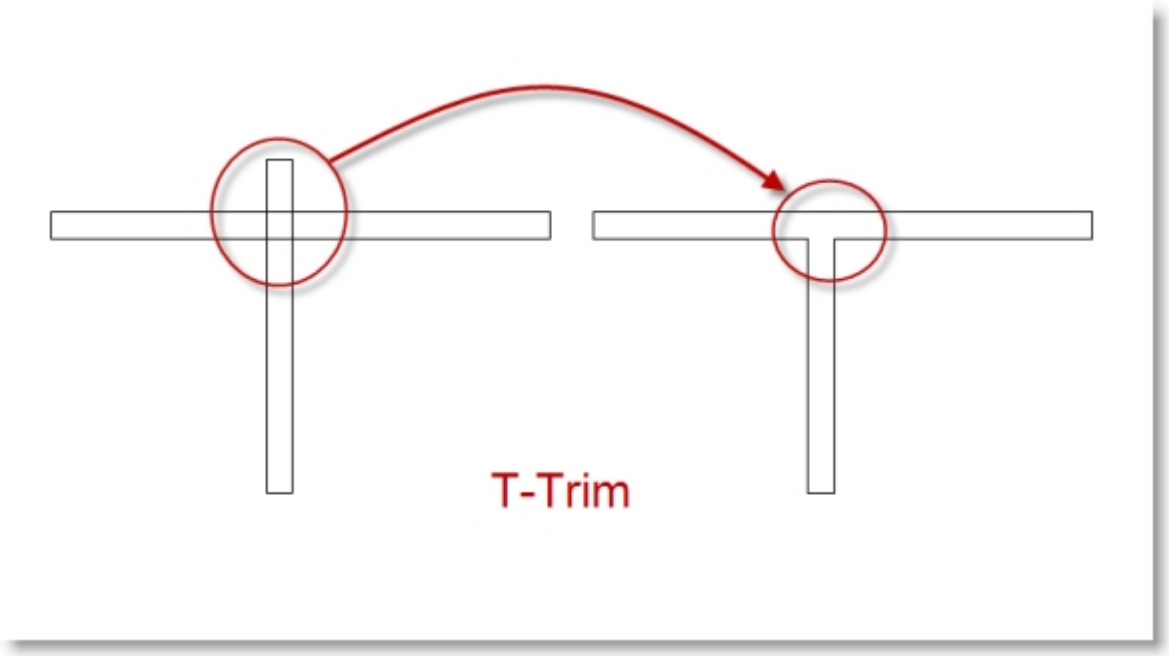


Trim

Wall Trim







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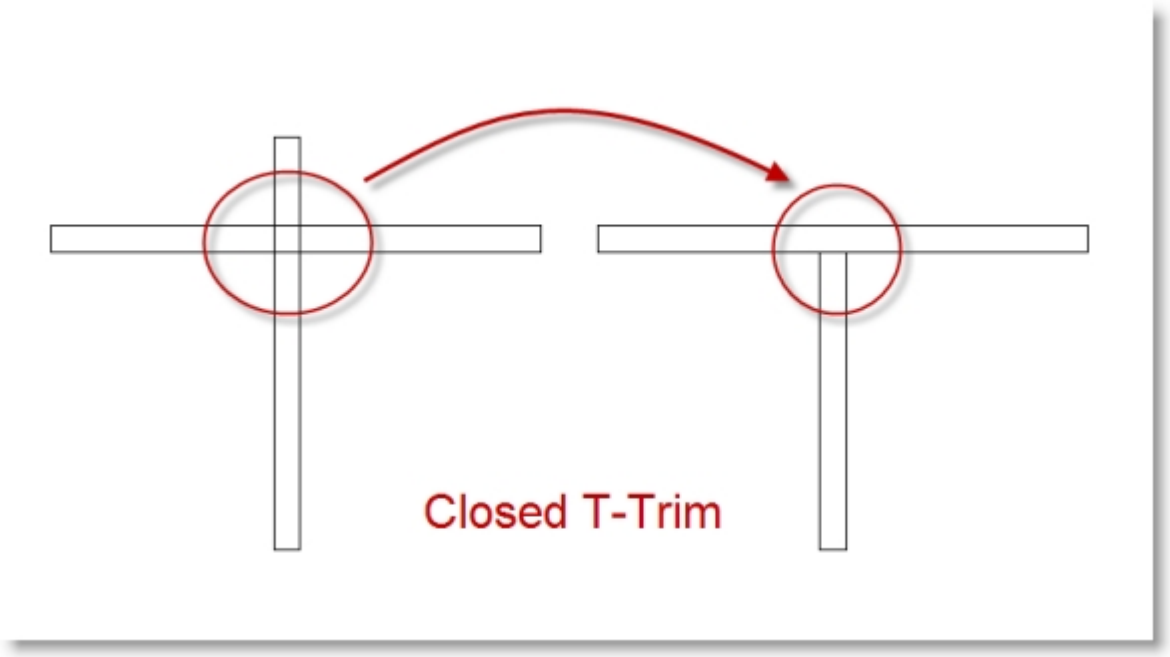
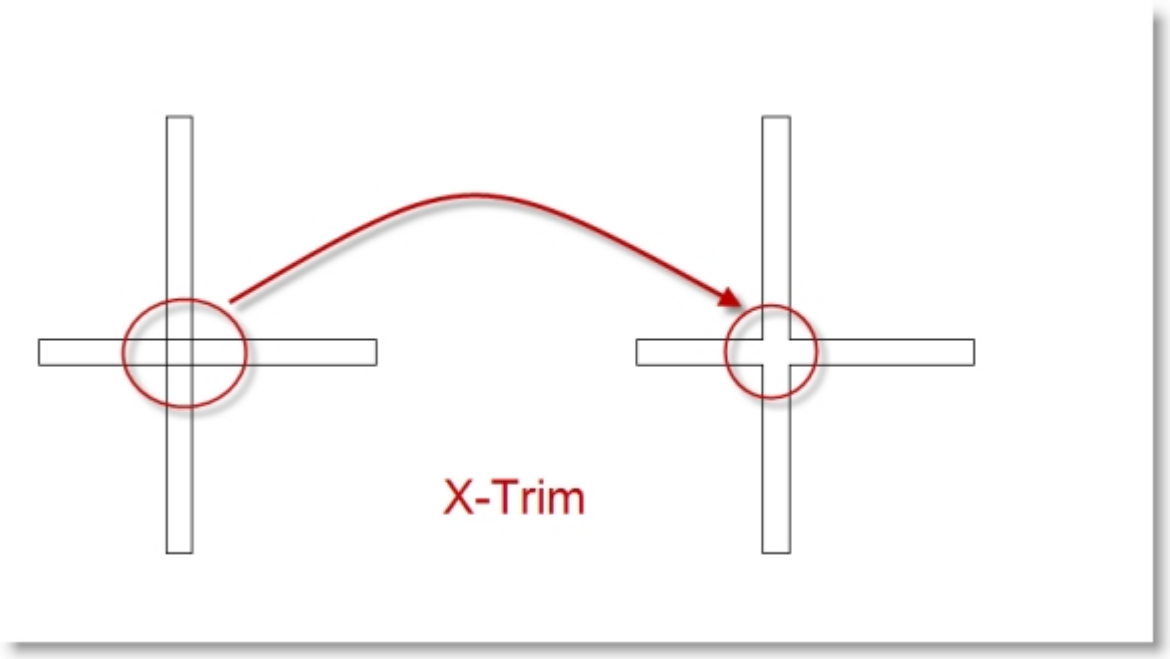
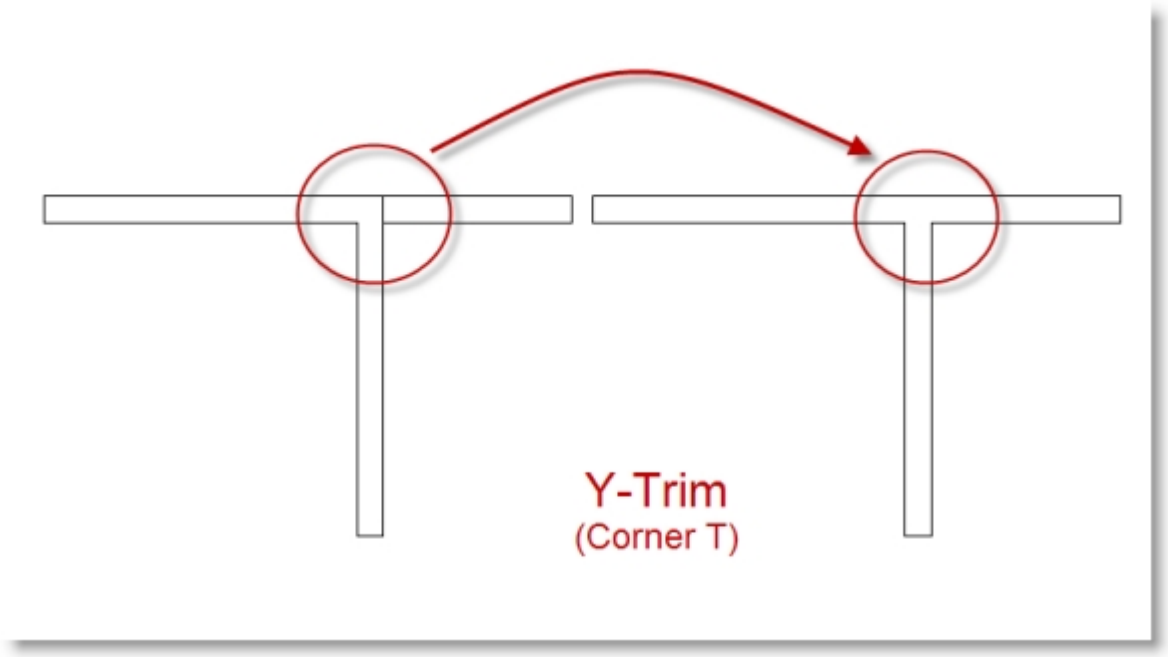
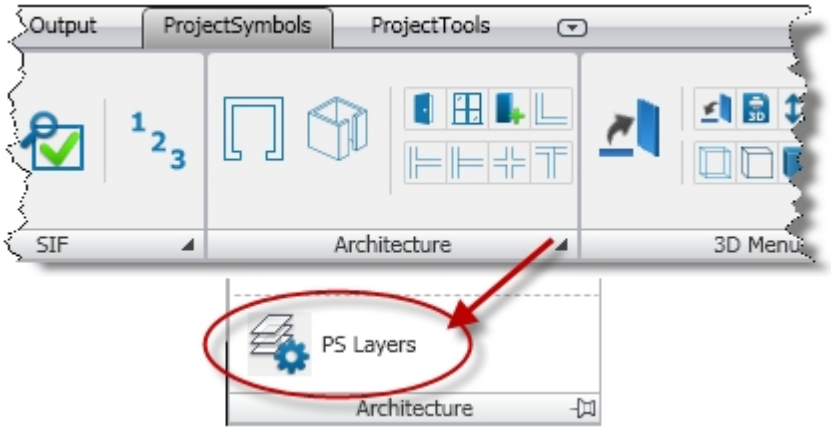

Closed T-Trim


X-Trim



Layer Settings

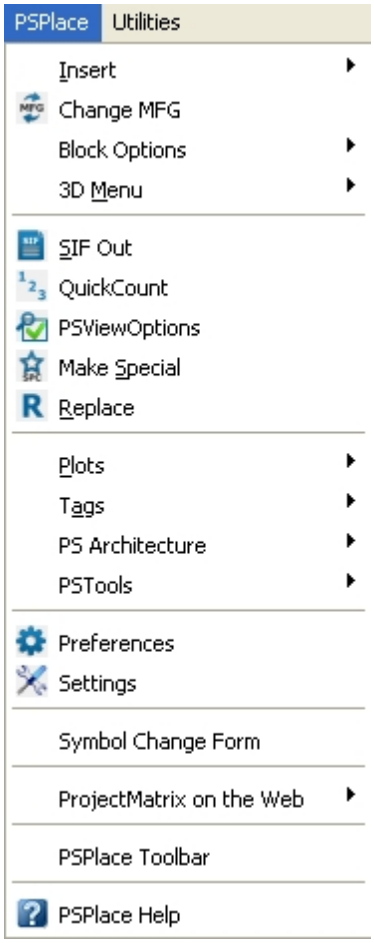
PS Layers

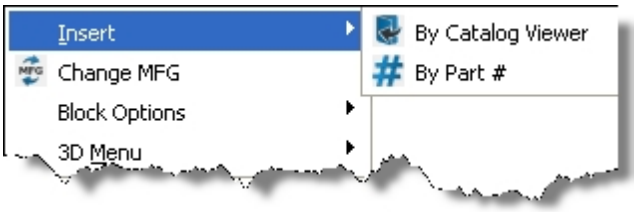


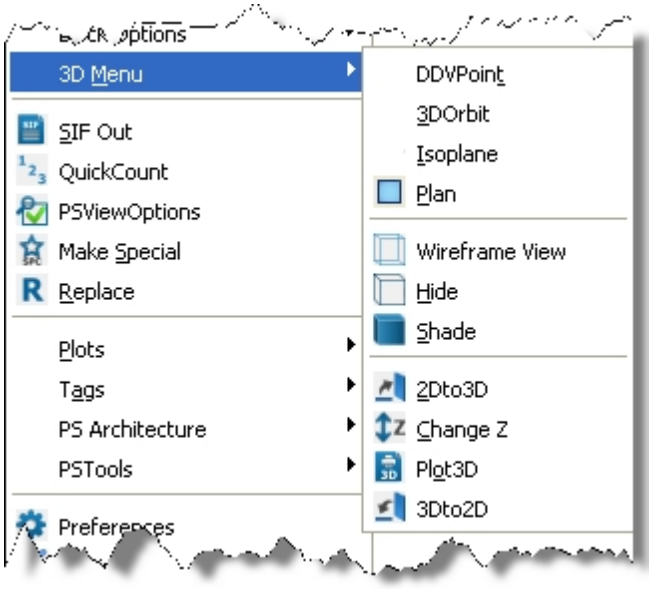
PSPLACE

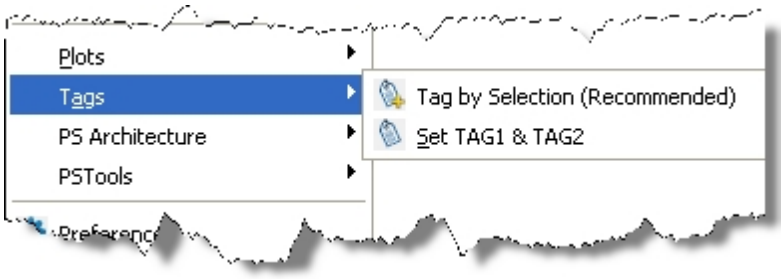
PSPlace Menu

The PSPlace Menu is the pull-down menu system for the ProjectSymbols program. Many of the commands available in the PSPlace menu have corresponding Toolbar short-cuts. Please refer to the PSPlace Toolbar section to locate the needed short-cut.



Insert -	This option gives you the ability to either place the needed graphics by the following two commands. • By Catalog Viewer • By Part Number 
Option/Re-Option -	This command allows the user to either select options for symbols that were placed or select new options (ex. Fabrics and finishes for various parts)
3D Menu -	This option gives the user the following 3D commands and functions: • **DDVPoint** • **3DOrbit** • **Isoplane** • **Plan** • **Hide** • **Shade** • **2Dto3D** • **ChangeZ** • **Plot3D**



Replace -	This command gives you the options to replace one or more symbols with another symbol.
SIF out -	Generates a SIF file of the selected symbols.
Make Special -	Allows the making of a custom part that is not part of the standard product line.
Change MFG -	Changes the current manufacturer.
Plots -	This gives you options to plot either Texted or No-Texted plans based on: • Panel Plan • Component Plan • Electrical Plan • All Plan • General Plan
Tags -	This allows you to Tag objects by: • Set Tag1 & Tag2 • Tag by Selection This allows you to Tag objects by: • Set Tag1 & Tag2 • Tag by Selection 

PSTools -	This allows you access to more PSPlace Tools:
	• Typical Manger
	• Schedules
	  o from Drawing Selection
	  o from SIF File
	• Quick Count
	• Find & Highlight

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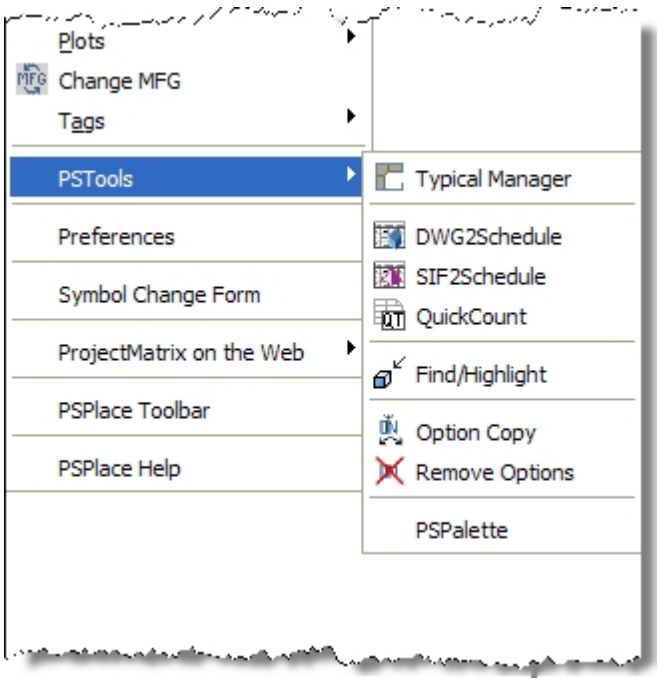
	• Option Copy • Option Remove • PSPalette Side-Bar 
Preferences -	Changes PSPlace settings.

PSUtilities

SIF

SIF-out

SIF Out

Once you have completed a design layout you can build a parts list and quote in ProjectSpec. To get all of the information from your drawing to ProjectSpec you will be using the “SIF Out” command. SIF Out is the process of creating a SIF file. This file will contain a list of all symbols that you select. Once the file is created you can open this file in ProjectSpec and then option out, price, discount, and build a quote from the SIF file.

After the SIF Out command has been executed the AutoCAD command line will read “Select objects”. Choose the symbols you wish to include in the SIF file. After you have selected the appropriate symbols the SIF Takeoff window will appear.

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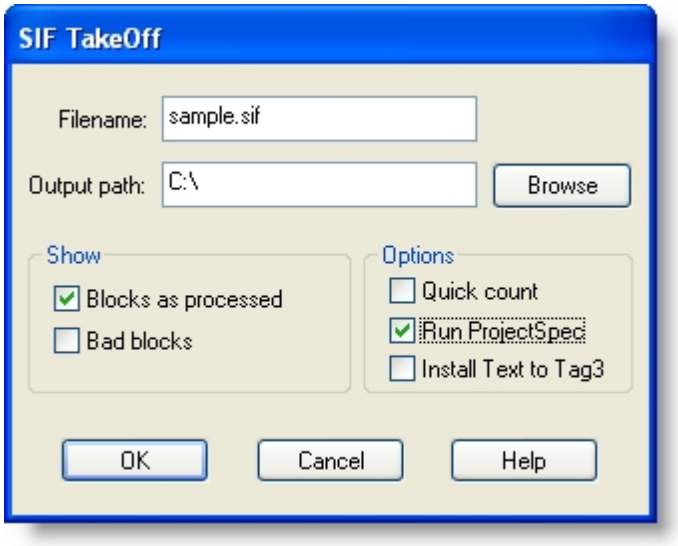

The SIF Takeoff window allows you to define the SIF Out parameters. In this window you specify the SIF filename, the path it should be saved to, and the desired feedback

Filename - Type in the filename for the SIF file. Be sure to include the SIF extension. *The default file name is the drawing filename + .sif.*

Output Path - Allow you to choose the place on your hard drive where the SIF file will be saved.

Show...

- **Blocks as Processed** - check if you want the SIF takeout processing to show on-screen. *recommended*.
- **Bad Block-** check if you want the takeoff to alert you of bad blocks with no attributes. *recommended if there are many special symbols*. If "Bad Blocks" is not checked, the takeoff will still be created, but it will not include the bad blocks.

Options...

- **Quick Count-** Provides a table to check counts and part numbers within AutoCAD. This option does not create the SIF file.
- **Run ProjectSpec-** creates a SIF file and ProjectSpec automatically opens upon completing the takeoff.
- **Install Text to Tag 3-** Pulls the Install text from the drawing and adds the I-Text to Tag 3 in the SIF file. *It is not recommended to use this if you are doing a Take-Off of a drawing using Panel Builder.*

QuickCount

Quick Count

Quick Count simply allows you to make a selection in your drawing and provides you with an "Excel like" dialog box. From this box you can sort columns, print or copy the fields into Microsoft Excel or other similar programs.

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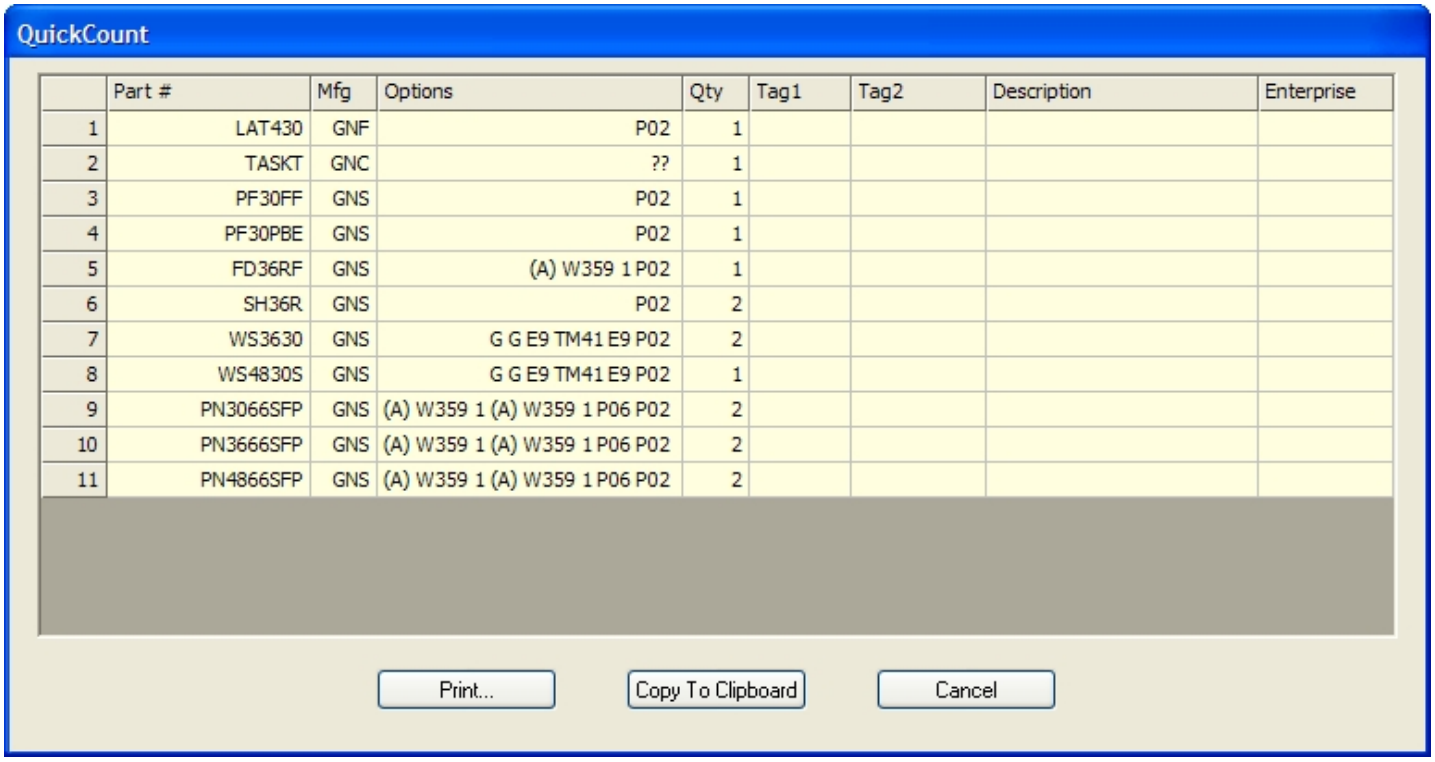


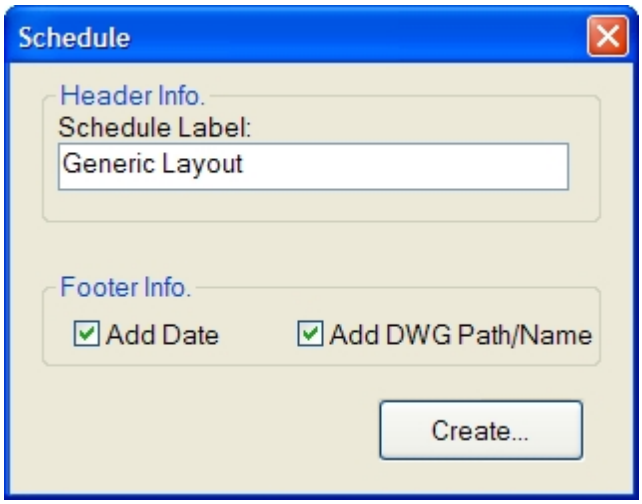
Schedules

Schedules

Drawing to Schedule

1. Choose the "Drawing to Schedule" tool, and you will get the following dialog box. Type in the schedule name, and then choose the options for adding the date and path to the schedule.

2. When you press the "create" button, you will be prompted to select the symbols from the drawing.



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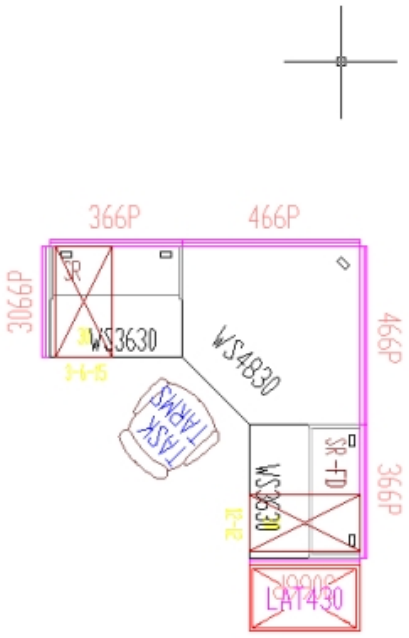
3. It will create the schedule, and then you will prompted to select the insertion point.



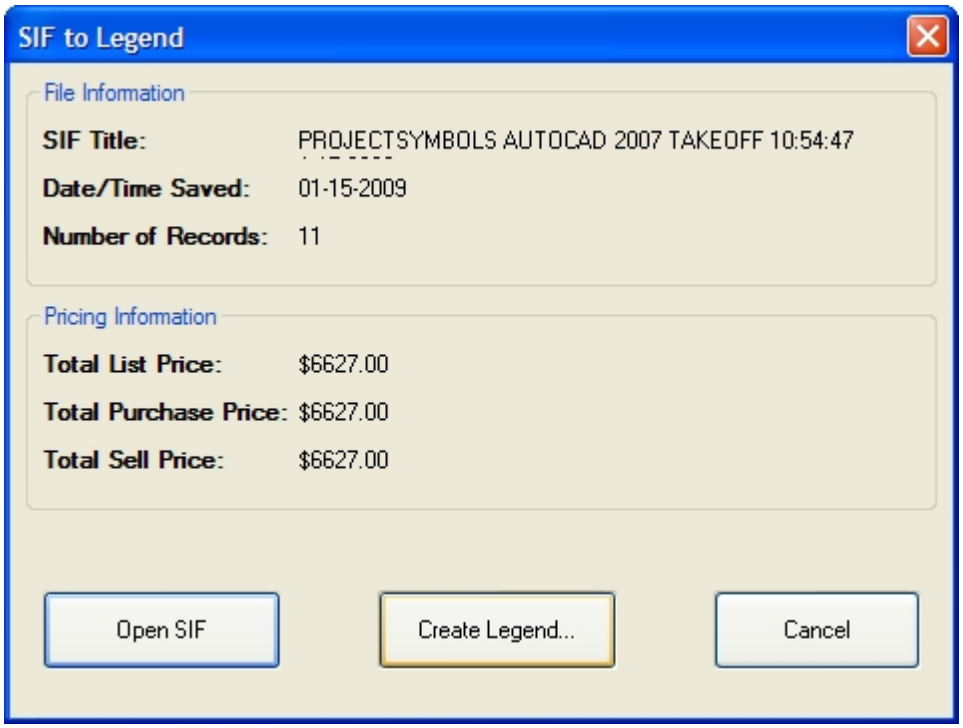
Generic Layout

Item #	Part Number	Options	Catalog Code	Tag 1	Tag 2	Qty
1	FD36RF	(A)\W359\I\P02\	GNS	.	.	1
2	LAT430	P02\	GNF	.	.	1
3	PF30FF	P02\	GNS	.	.	1
4	PF30PBE	P02\	GNS	.	.	1
5	PN3066SFP	(A)\W359\I\(A)\W359\I\P06\P02\	GNS	.	.	2
6	PN3666SFP	(A)\W359\I\(A)\W359\I\P06\P02\	GNS	.	.	2
7	PN4866SFP	(A)\W359\I\(A)\W359\I\P06\P02\	GNS	.	.	2
8	SH36R	P02\	GNS	.	.	2
9	TASKT	??\	GNC	.	.	1
10	WS3630	G\G\E9\TM41\E9\P02\	GNS	.	.	2
11	WS4830S	G\G\E9\TM41\E9\P02\	GNS	.	.	1

Created on Thursday, January 15, 2009 from C:\Documents and Settings\rob\Desktop\TDI\3d\Drawing2.dwg

SIF to Schedule

1. Choose the "SIF to Schedule" tool, and you will get the following dialog box.
2. Click the "Open SIF" and browse for the SIF file.
3. Click "Create Legend..." and then choose the insertion point in the drawing.



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PROJECTSYMBOLS AUTOCAD 2007 TAKEOFF 10:54:47 1-15-2009

Rec #	Part Number	Part Description	Catalog Code	Qty	List	Extended
1	LAT430	FILE, LATERAL, 4-HIGH, 30"W	GNF	1	943.00	943.00
2	TASKT	CHAIR, TASK, WITH "T" ARMS	GNC	1	994.00	994.00
3	PF30FF	DRAWER PEDESTAL, FIXED, 30"D FILE, FILE	GNS	1	425.00	425.00
4	PF30PBE	DRAWER PEDESTAL, FIXED, 30"D PENCIL, BOX, EDP	GNS	1	425.00	425.00
5	FD36RF	FLIPPER DOOR, REGULAR, FABRIC FRONT, 36"W	GNS	1	320.00	320.00
6	SH36R	SHELF, REGULAR, 36"W	GNS	2	150.00	300.00
7	WS3630	WORKSURFACE, RECTANGULAR, WITHSUPPORTS, 36W X 30D	GNS	2	320.00	640.00
8	WS4830S	WORKSURFACE, CORNER, STRAIGHT LEADING EDGE, 48W X 30D	GNS	1	626.00	626.00
9	PN3066SFP	PANEL, POWERED, FABRIC OVER STEEL, STEEL TOPCAP, 30W X 66H	GNS	2	268.00	536.00
10	PN3666SFP	PANEL, POWERED, FABRIC OVER STEEL, STEEL TOPCAP, 36W X 66H	GNS	2	311.00	622.00
11	PN4866SFP	PANEL, POWERED, FABRIC OVER STEEL, STEEL TOPCAP, 48W X 66H	GNS	2	398.00	796.00
					Total:	6627.00

NOTE:

You can "Scale" the dialog boxes using the AutoCAD "Scale" if you need to change its size. The font in the schedule can also be changed by going to "Format->Text Style"

These can also be "Exploded" to edit the text inside the schedule.

OptionView

OptionView

The ProjectSymbols OptionView dialog box allows access to tools and information on individual symbols.

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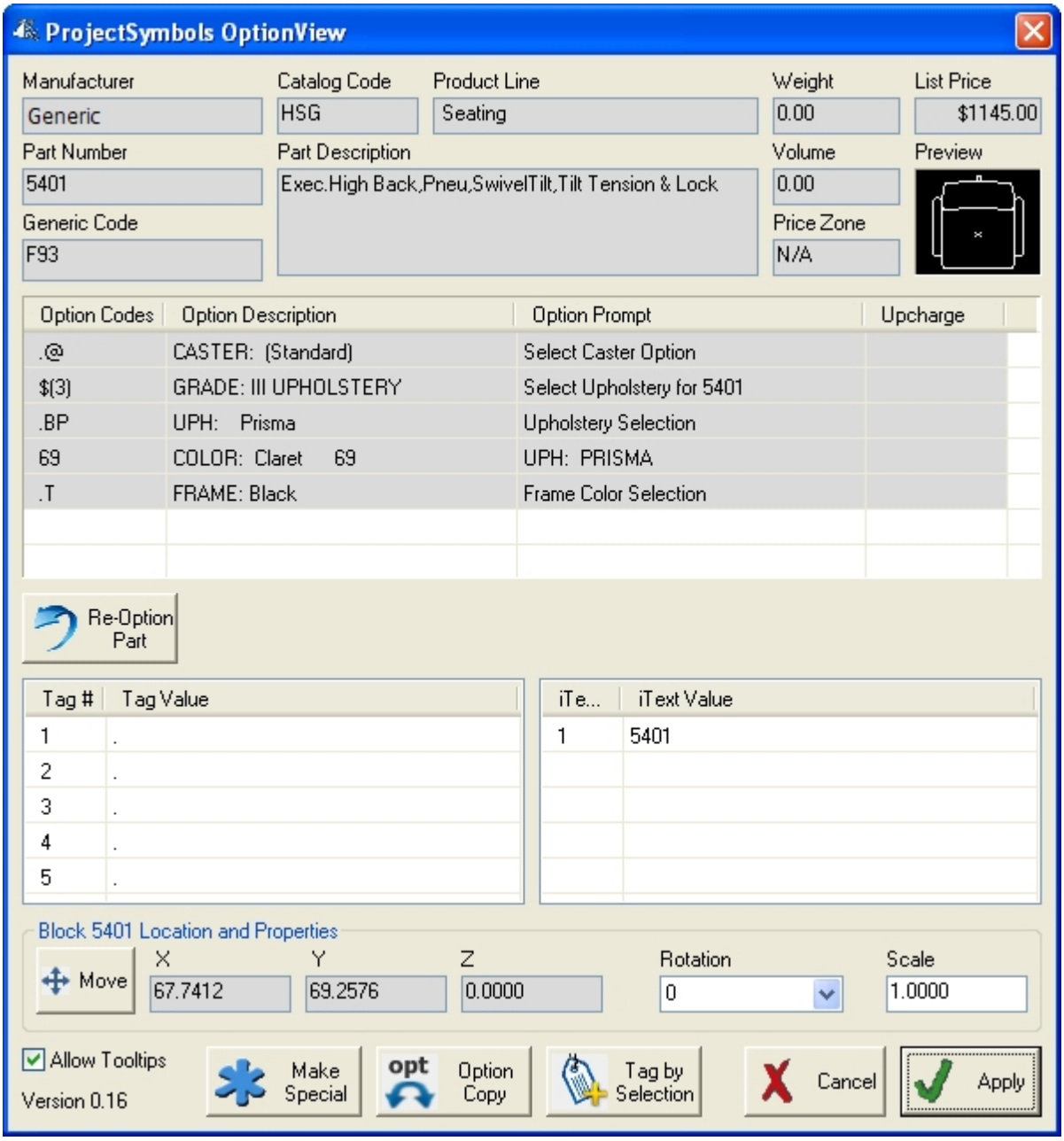


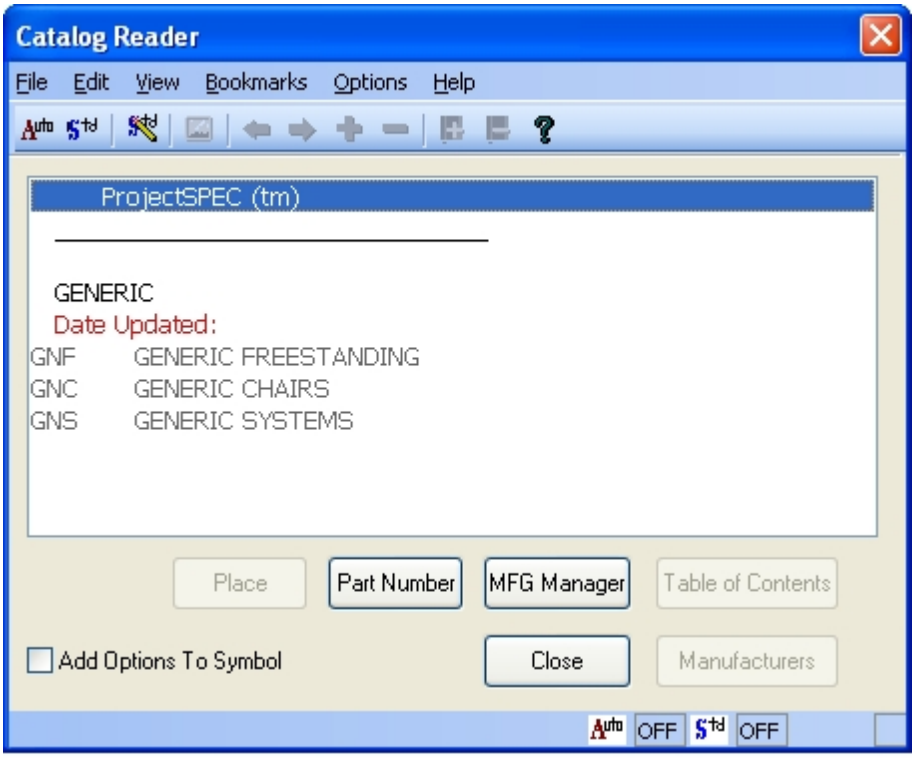
OptionView Commands:

- **Re-Option Part** - Add or change the finish options for the selected part.
- **Move** - Allows you to move the symbol in the drawing using the original insertion point of the symbol.
- **Rotation (Drop Down Selection)** - Allows you to reset the original rotation of the symbol by selecting a standard 90 degree selection of 0, 90, 180, or 270.
- **Scale** – Set scale for this single symbol. *(Imperial to Metric is 25.4 and Metric to Imperial is 0.0394)*
- **Option Copy-** *See Option Copy Section*
- **Make Special-** *See Make Special Section*
- **Tag by Selection-** *See Tagging Section*

Symbol Insertion

Insert by Catalog Viewer

The Catalog Viewer is designed to improve the way you place symbols that you may not be familiar with. It allows the user to "drill down" to a part number using the electronic catalog. When opened, the Catalog Viewer window displays the current manufacturer at the top of the window. Following the manufacturer name will be the date that the catalog was updated. Below the date is the manufacturer's lines of products. Each line can be selected and the user can drill down through the catalog to select the desired part.



- **Main Screen** - displays the manufacturer libraries from the highest level to the specific part number. You will double click within this area to drill down to the specific part number. Make note of the categories you click on.
  - Manufacturer Name-
  - Date Updated- This displays a month and year which denotes the ProjectMatrix monthly DVD it was last published on.
  - Library- Manufacturers may have anywhere from one to twenty sub categories or libraries under their name.

- **Bookmarks** - leads to the Bookmarks Window that allows you to create bookmarks for frequently used part numbers. You may create bookmarks between manufacturers (explained below.)

- **Place button** - once you have drilled down to a specific part number and it is currently highlighted, you click this button to return to the plan and place the symbol.

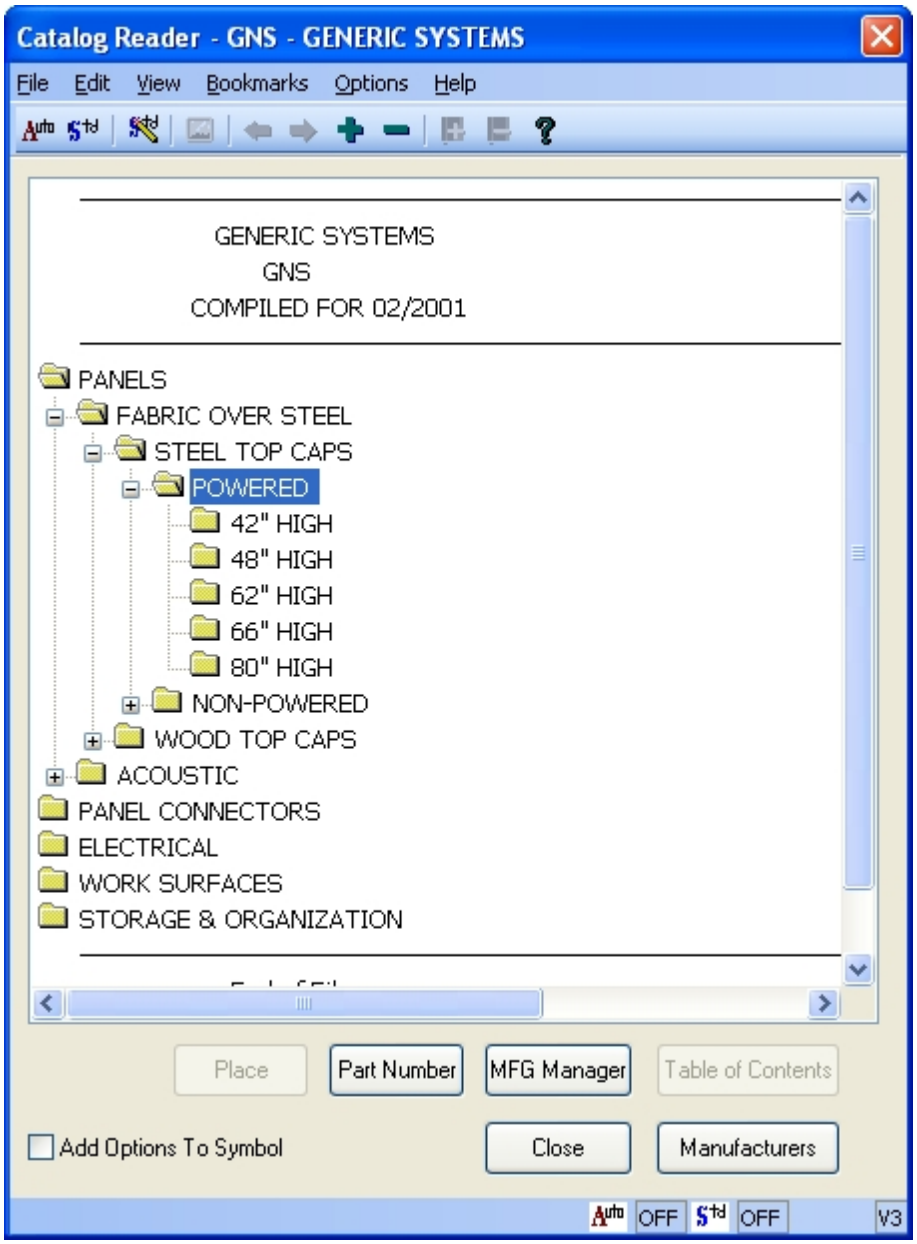
- **Part Number button** - leads to the Part Number Window.

- **MFG Manager button** - leads to the Select Manufacturer Window.

- **Manufacturers-** This will return you to the main page of your current Manufacturer.

- **Close button** - closes this window.

- **Add Options to Symbol** - If you want to option your blocks as you place them open your Catalog Reader,click the check box in the bottom left-hand corner of the window labeled, “Add Options To Symbol”.



Placing a Part Number Using the Catalog Viewer:

1. Click on the Place Symbol by Catalog Viewer button on the PSPlace toolbar.

2. The Catalog Viewer window opens. In the Available Libraries area you will see all libraries available for the current manufacturer. (To change manufacturers click on the MFG Manager button.)

3. Double click on the library you wish to access.

4. You will see that the white text display area is now showing the catalog for the library.

5. Drill down on the groups shown by double clicking on the name until you get to the specific part number needed. Once you find the part number you need, click it once to highlight it to verify the description and then click the Place button. If you have the "Add Options To Symbols" checked, then double click the part number to put it in your drawing, and then select the appropriate finishes/fabrics.

6. If this is the first part number you have placed in a drawing, you will be asked for a Symbol Scale. Most occurrences you will keep a scale of 1.0.

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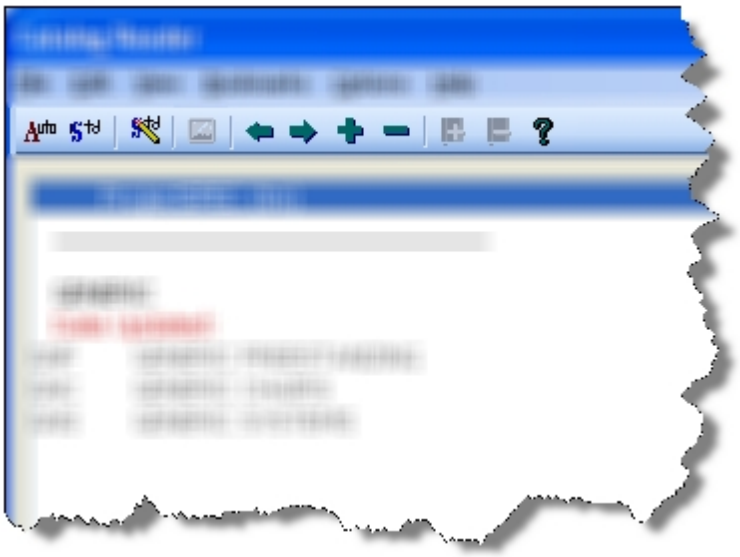
Catalog Viewer Toolbar



Auto Option-

Standard Option-

Edit Standard Options-

Previous Level-

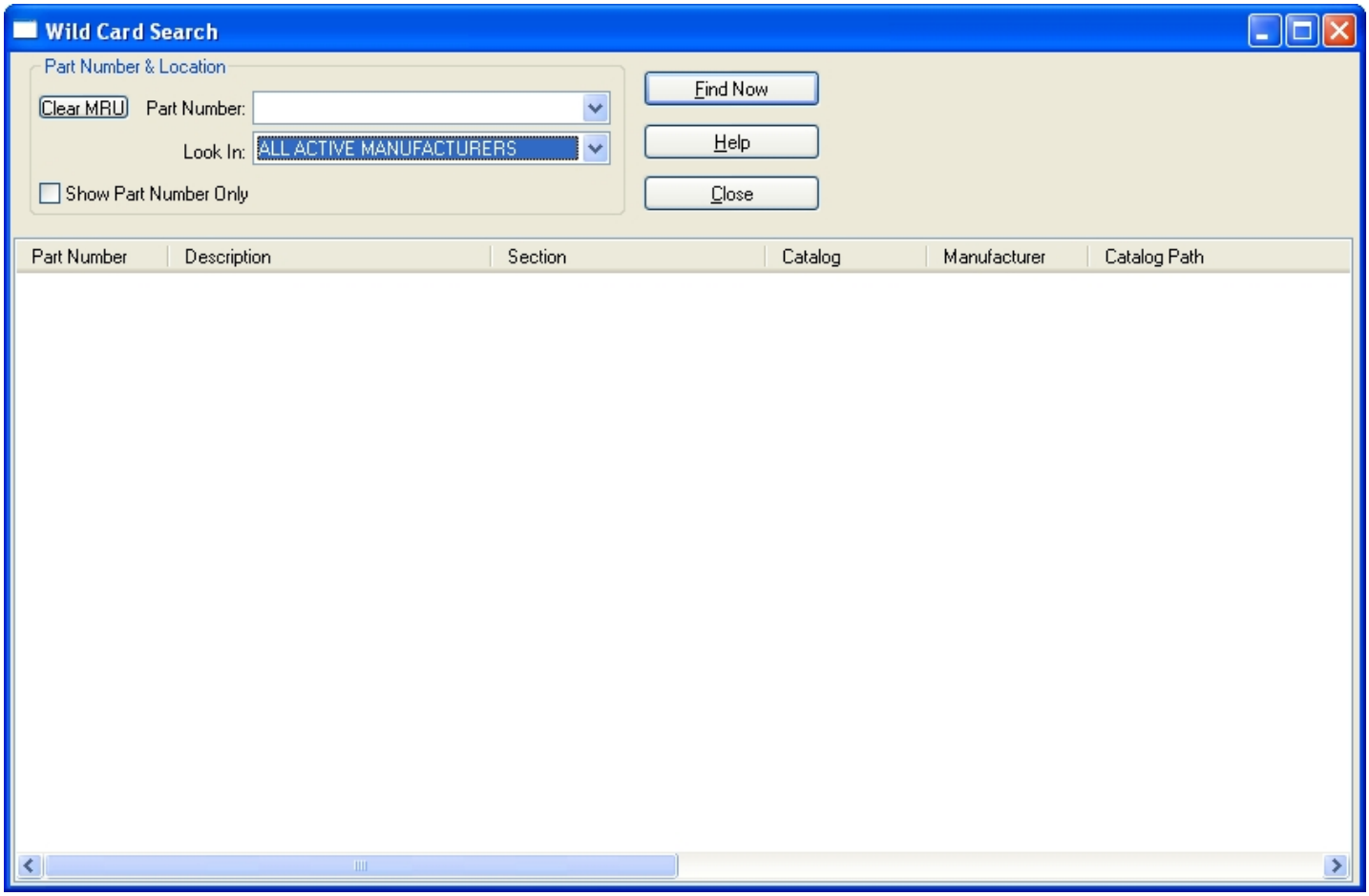
Next Level-

Expand Tree-

Close Tree-

About Catalog Viewer-

Wildcard Search



Insert by Part Number

Part Number

The Place by Part Number dialog box is very simplistic but very powerful. To place a symbol in your drawing simply type the full part number into the box and click the “Place” button.

Type in the complete part number and click on "Place"

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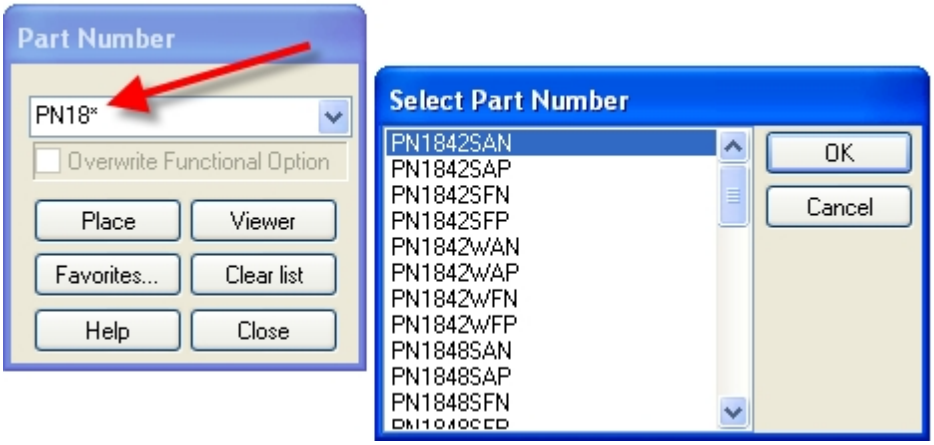
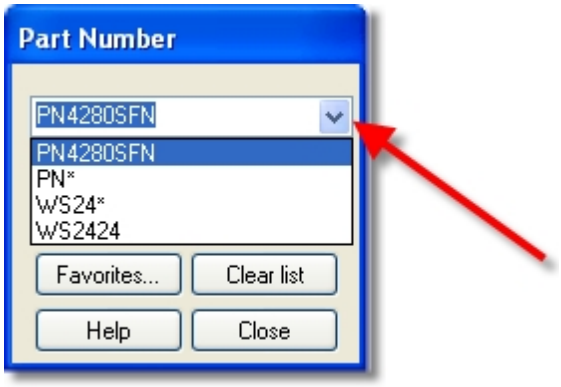
If you do not know the entire part number you can type as much as you know, followed by an asterisk * (called a wildcard), and then press place. This will find all part numbers matching your text with the unknown from the asterisk.



The Part Number dialog box will retain recently used part numbers for easy selection. Click on the drop-down to find the desired part.



Change MFG

Change Manufacturer

To select a manufacturer, simply highlight the name of the manufacturer you which to work with and click the OK button at the bottom of the window.

TIPS:

Make sure your desired Manufacturer is active when doing MFG specific commands:

Place Symbol
2Dto3D
Re-Option
Install Drawings
Replace

Wildcards

Wildcards are an asterisk (*) that can substitute any character in a part number to make it more generic. They can be used in many areas in the ProjectSymbols and ProjectSpec. One common use for Wildcards are when inserting symbols or records by part number. See below for examples.

Examples of a WILDCARD:

Full part number for a worksurface would be WURA-2436-LJSA.

You could do WURA-* and find all sizes and options for that part.

You could do WURA-*-LJSA to find all sizes for that part with those options.

You could do WURA-24*-LJSA to find all 24” deep worksurfaces with those options.

Other uses include:

- Insert by Part Number
- Standard Options
- Find/Highlight
- Option Copy

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- Replace

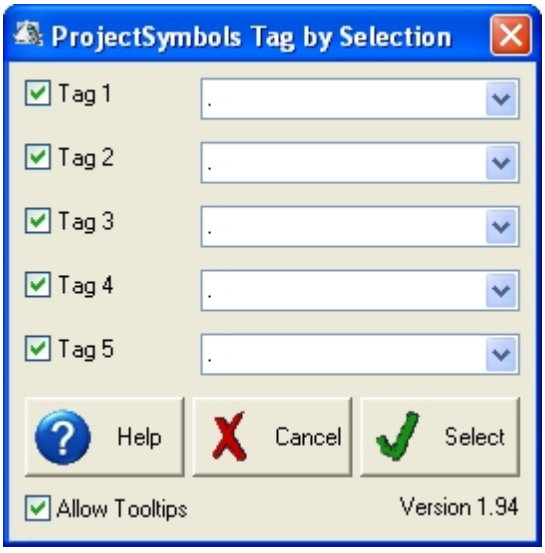
Symbol Modify

Tags

Tagging

- **Tag by Selection**

Using the "Tag By Selection" will allow you to specify tags and then select blocks by window or individual selection.



- Place a "CHECK" next to the tags you want to use. Unchecked Tags will be left alone and not changed or updated.

- Type in a NEW TAG.
  (Leave Blank to Remove Tags)

  OR

- Select an existing tag from the drop down box.
  (Existing Tags in the drawing will be populated in the drop downs)

- Click the SELECT and then make a selection or window crossing on your drawing to Tag blocks.

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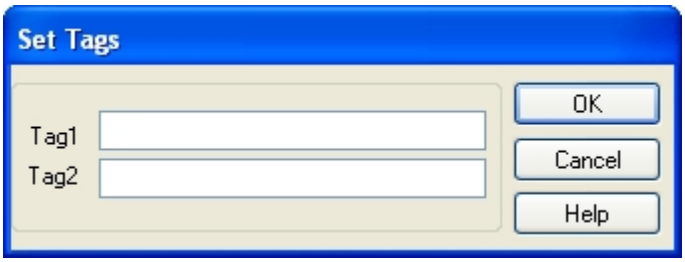
- **Set Tag1 & Tag2-**
  Using the "Set Tag" will place the Tag1 & Tag2 that you specify on each new symbol you place in the drawing.

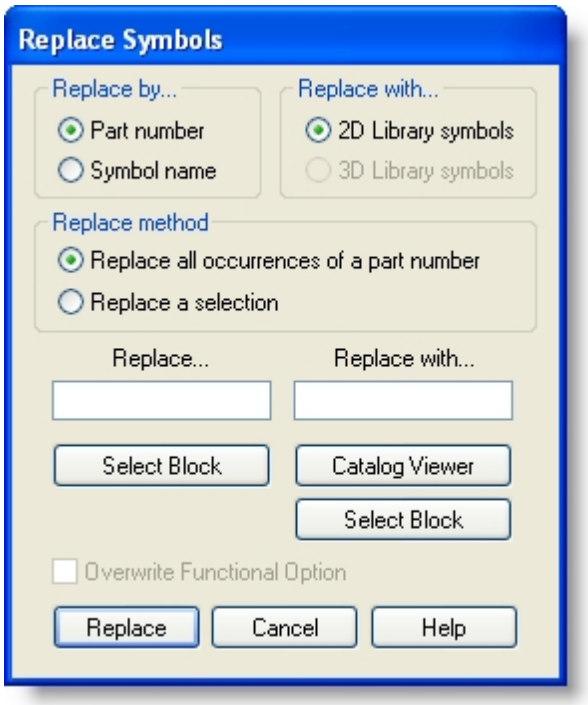


*****NOTE*****
To remove tags set in the drawing use the "Tags By Selection", leave the field blank and window your selection.

Replace

Replace command

The replace command is one of the strongest features of ProjectSymbols. It allows you to replace any symbol, or multiple symbols in your drawing with a different symbol. This can be a great time saver and a critical tool to have when changes need to be made to a design.



Replace By -

- Part Number- Replaces a block by part number.
- Symbol Name- Replaces a block by the block name.

Replace With -

Click whether the replacements are 2D or 3D symbols.

****For Haworth users only, it is possible for you to enter this part number using the Catalog Viewer so it will use the Overwrite Functional Option setting if it is checked and if you have a functional option appended. If you manually type in a part number it will use the Overwrite Functional Option setting from the Part Number window.*

Replace Method -

Specify “Replace all occurrences of a part number” or “Replace a selection”. *If you specify “Replace a selection” the Replace text box grays out.*

- All occurrences- You can window the entire drawing an only the matching blocks in the "Replace..." box will be replaced with the "Replace with..." part number.
- Selection- You can window a selection and all blocks selected will be replaced with the "Replace with..." part number.

Replace... text box -

Specify which part number to be replaced. You can either type in the corresponding part number or click the “ Select Block” button to select a block already in the drawing.

Replace with... text box -

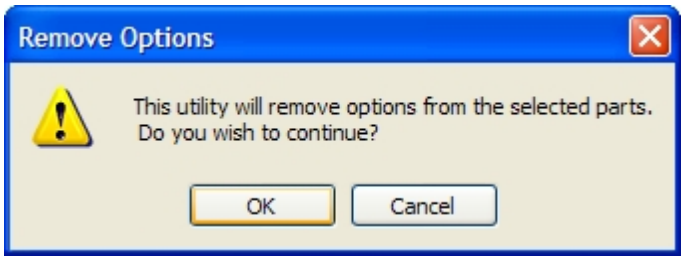
Specify selected part numbers for your selection. Type them in, use the “Catalog Viewer” button, or the “Select Block” button.

Remove Options

Remove Options

"Remove Options" will simply remove the option string from any symbol you select.

When you select the "Remove Options" command you will see the following warning dialog box:



If you select "OK" then you will be given a "Pick-Box" to select symbols or to drag a "Window" to remove options.

Re-Option

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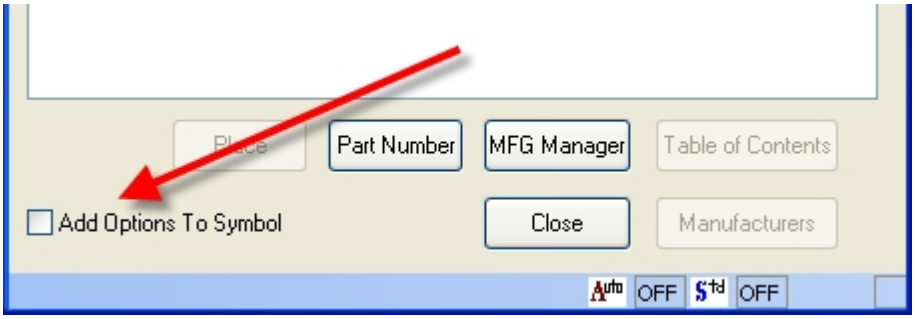
Option & Re-Option

Option / Re-option Block

There are several different ways to option / re-option your blocks in ProjectSymbols. If you want to option your blocks as you place them open your Catalog Reader and click the check box in the bottom left-hand corner of the window labeled, " Add Options To Symbol".



or

You can re-option a part by selecting the "Option/Re-Option Block" on the toolbar

Placing by catalog viewer:

You can now double-click the part you wish to option and place. The option screen will appear to allow you to add options to the part before it is placed. Choose the appropriate options for your part by double clicking on them.

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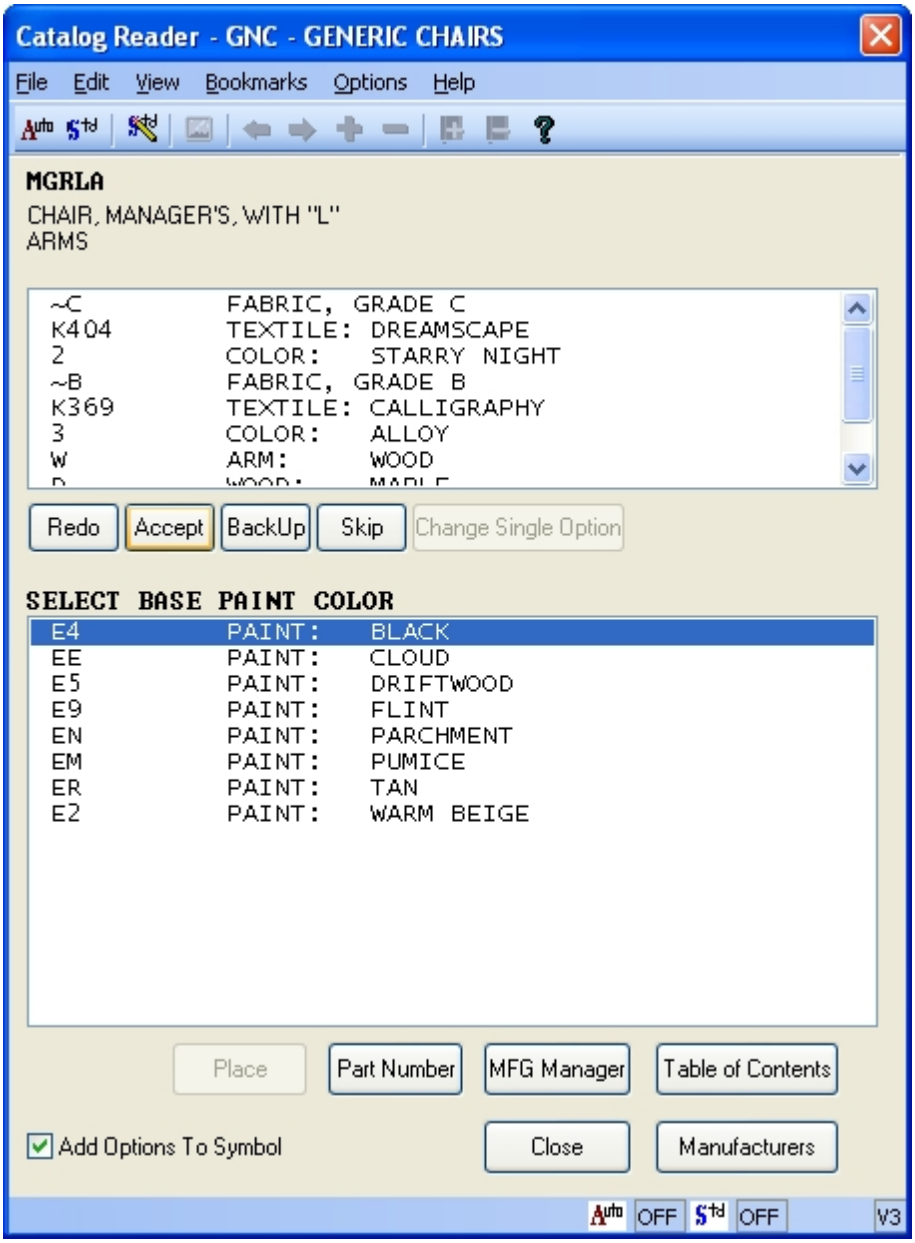

Option/Re-Option block:

You can now choose the Re-Option button on the toolbar. You will be prompted to select a block. After choosing the block, the option screen will appear to allow you to add options to the part selected. Choose the appropriate options for your part by double clicking on them.

Option Copy

Option Copy

The "Option Copy" will allow you to select a symbol with options and copy them to other symbols in the drawing.

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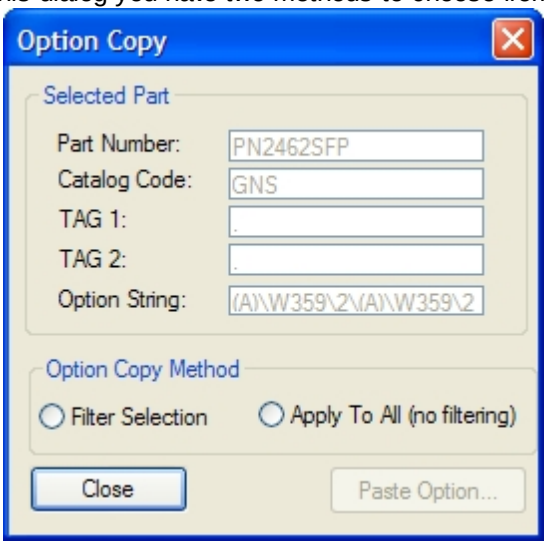
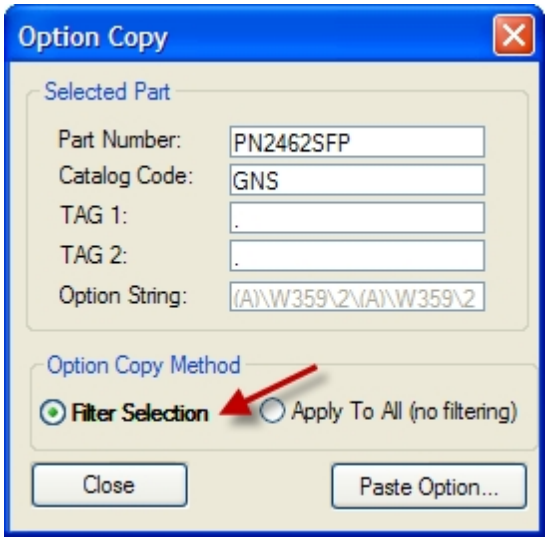
To copy options click on the "Option Copy" and then select the symbol you wish to use. An "Option Copy" dialog will pop up like the one shown below. From this dialog you have two methods to choose from when pasting the options.



The first choice is "Filter Selection".



This will allow you to apply the option string to only those parts that match the specified criteria in the Part Number and/or Catalog Code. You may use a "Window" selection or a "Pick-Box" selection when selecting the symbols you wish to paste the options on.

NOTE: You may use the Wildcards in this box. For example, this particular part is a panel. Suppose you want to apply the options from this 24" wide x 62" high panel to all 62" high panels. Then you would change the Part Number in the dialog box to read *Part Number: PN*62SFP.* The wildcard should also be used in the Catalog Code, TAG1 & TAG2 fields to apply the options when not concerned about those fields matching identically.

The second choice is "Apply to All (no filtering)

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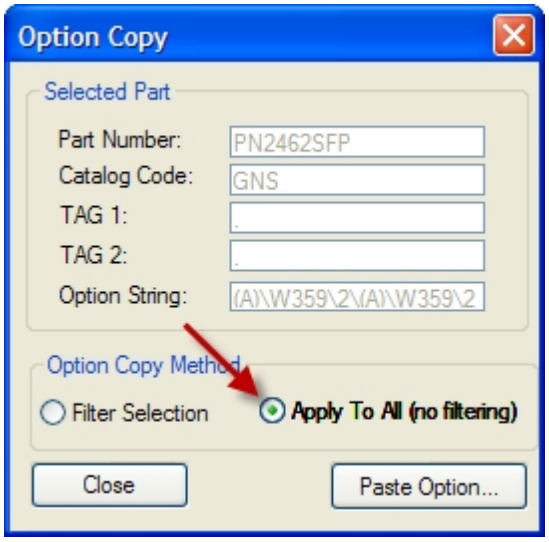

This will apply the option string to ANY part that you select with a "Window" selection or "Pick-Box" selection.

Warning: Regardless of which method you chose, options can be pasted on to symbols that those options are unavailable on. If an option is pasted onto a symbol that that finish is unavailable for, then pricing against the catalog in ProjectSpec, will give you a error with "INVALID OPTIONS FOR THIS PART".

Make Special

Make Special

In some cases you may need to create a custom symbol. To create your own custom symbol you can start from three places, one is to use an existing symbol that is the right size and shape that you may need and change the existing attributes. The second is to place a symbol and explode it then modify its existing attributes. The third is to start from scratch and create your own symbol.

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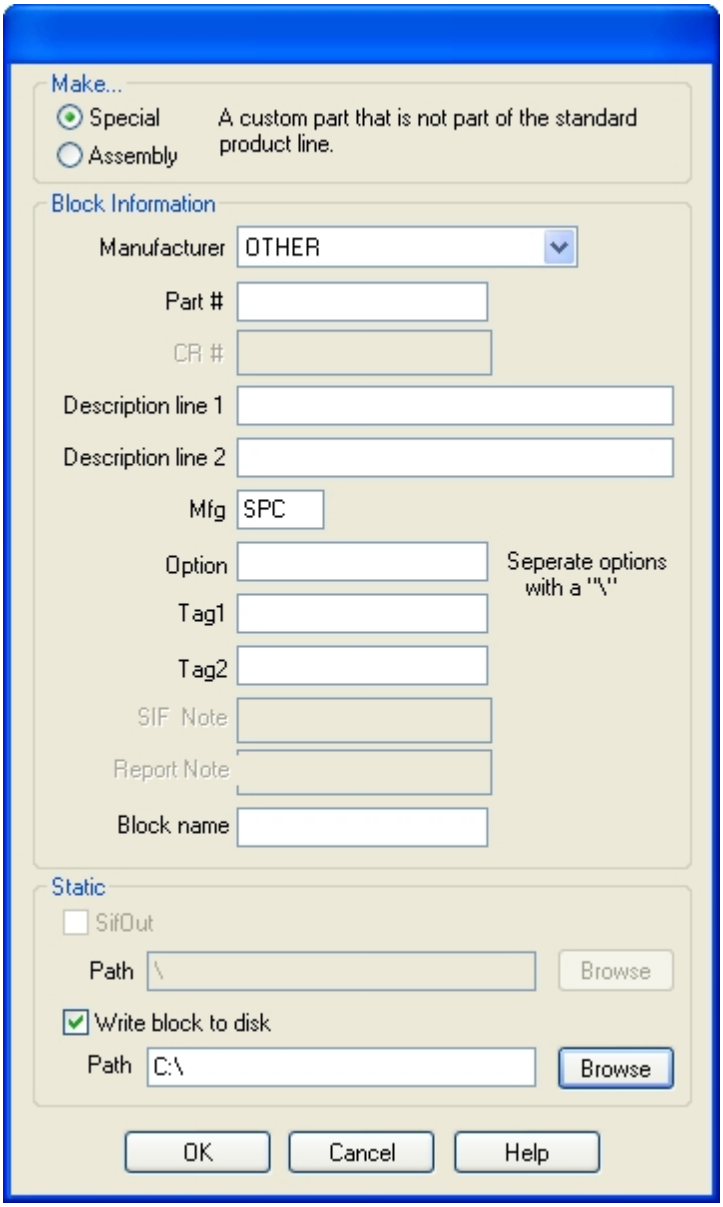
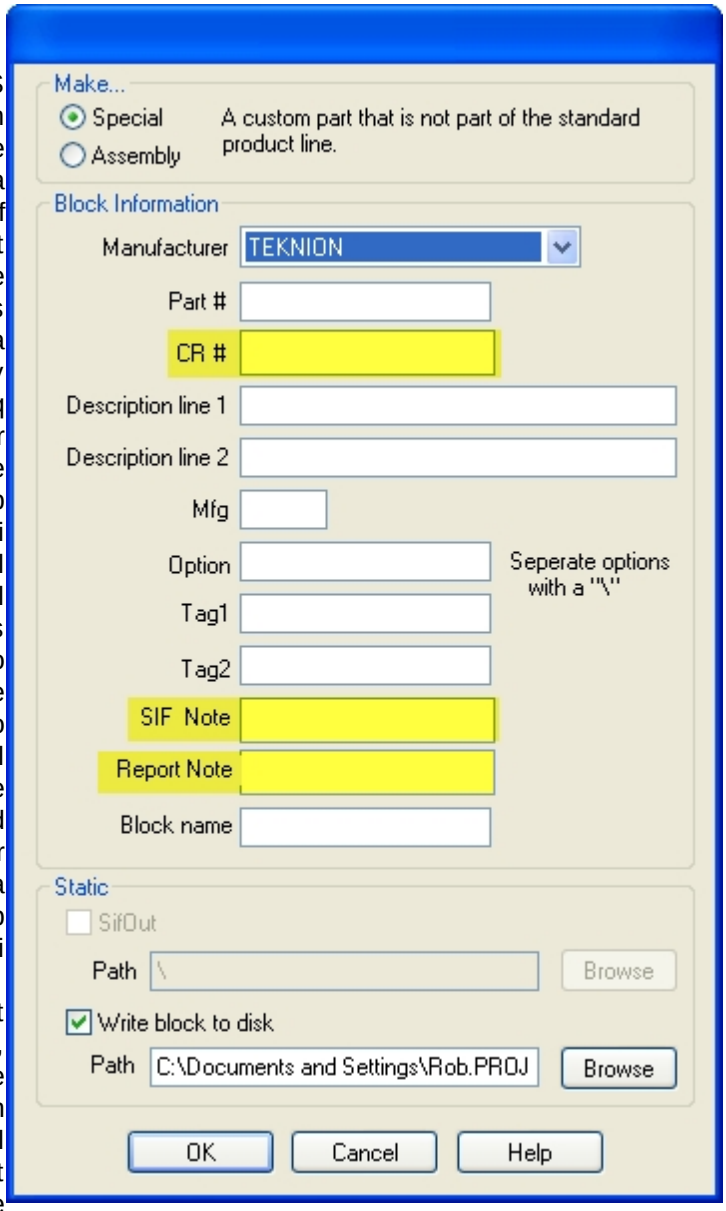


*Some Manufactures may require special fields to be populated for a special. If it is, then select the MFG from the pull down and new fields will be available.



Make...

- **Special** - Click this radio button when you are making a custom part that is not part of the standard product line. A special by definition is one typical.

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- **Assembly** - Click this radio button when you are making grouping of parts that you will use frequently.

Block Information...

- **Part #** - Type in your desired part number . When creating an assembly, you do not have to add the .SIF extension to the part number, if you have SifOut check ON in the lower left of this window. The program will automatically append the SIF extension to the part number so the takeoff is correct in ProjectSpec.

- **Description line 1** - Type your description. Limit of 30 characters.

- **Description line 2** - Type your description. Limit of 30 characters.

- **Mfg –** Typically it is the 3 character code you see in the Select Manufacturer Window. Otherwise enter a code of SPC to indicate it is a special. *This is grayed out for assembly.*

- **Option** - Enter the desired option code. *This is grayed out for assembly.*

- **Tag1** - Enter the desired TAG1 (8 char max.) *This is grayed out for assembly.*

- **Tag2** - Enter the desired TAG2 (20 char max.) *This is grayed out for assembly.*

- **Block Name –** Symbol name for future inserts. It is recommended NOT to use hyphens or dashes.

Static...

- **SifOut** - This option is available for assembly only. It is recommended you leave this checked. If you do not SIF out, the program will turn all of your part numbers into one big part number. When you try to pull it up in ProjectSpec, it would be unable to break out the part numbers that make up the assembly. If you had checked this, you would see all the parts in the assembly broken out in ProjectSpec.

- **Write block to disk** - If you choose to write this block to disk, this ensures the block is available to other drawings you may create. (In AutoCAD it is known as a WBLOCK.) If you do not check the box, then the block is saved within the current drawing and only available to the current drawing. (In AutoCAD it is known as a BLOCK.)

- **Path text box** - This is the place on your hard drive where the WBLOCK is saved.

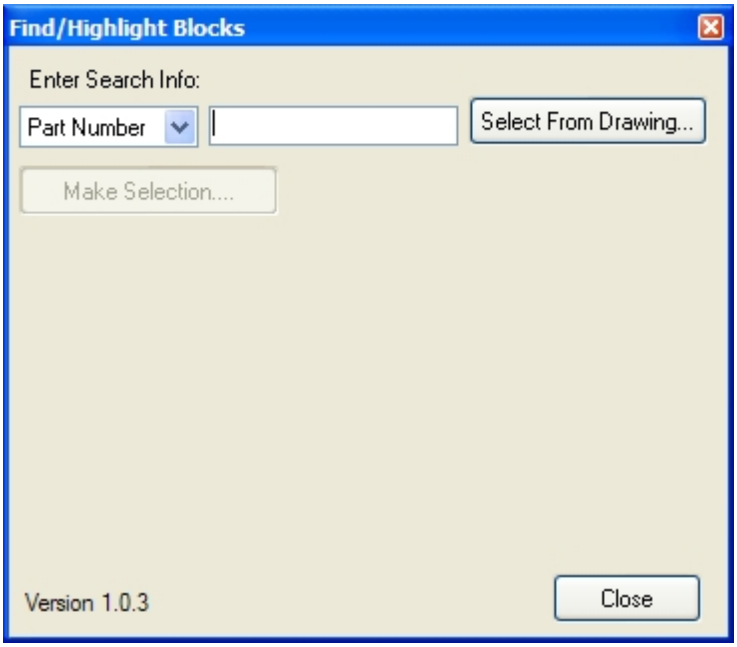
Find/Highlight

Find/Highlight

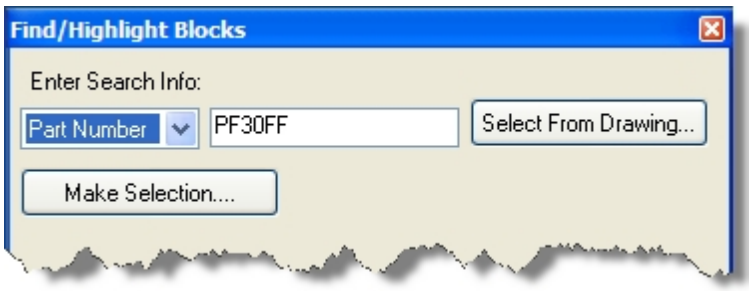
Find/Highlight

Find/Highlight will allow you to find blocks in your drawing.

Example: You are checking your SIF file, and notice a part that should not be there, but do not know where it is in the drawing to delete it or change it.



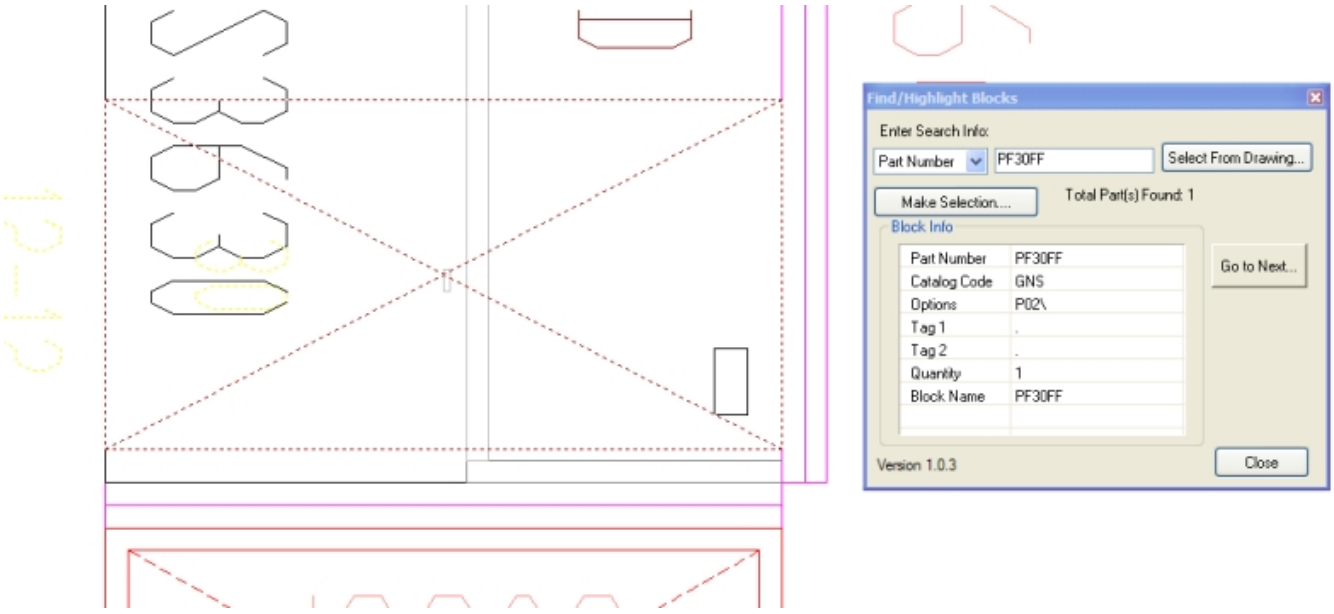
1. Type in the part number, or use the "Select From Drawing" if you can find one, but need to find similar parts.



2. Click the "Make Selection". Window your drawing or type in "All" in the command line.

3. The dialog will show "Total Part(s) Found: X

4. Click the "Go to Next..." to find & highlight the item.



5. If there are more than one items found, then you can continue to hit the next to scroll through all of them in the drawing.

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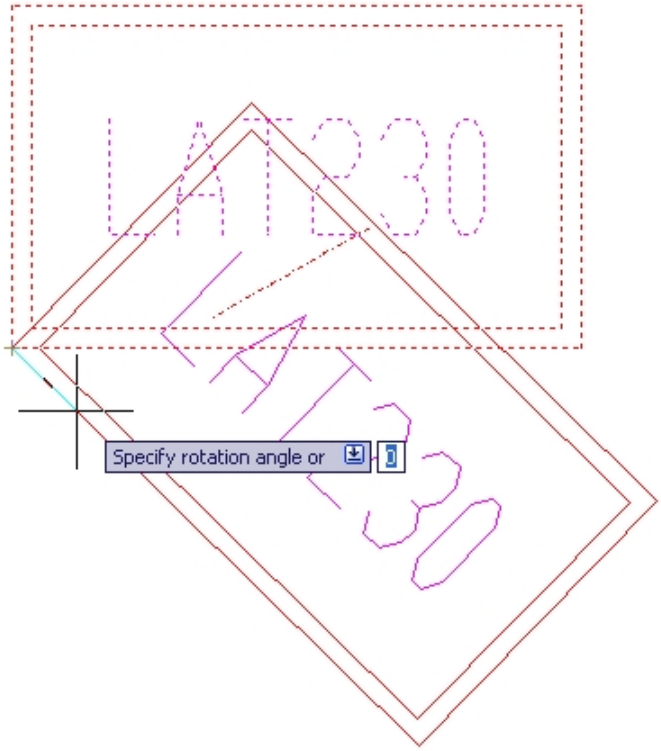
Copy & Copy/Rotate

Using the Copy/Rotate commands

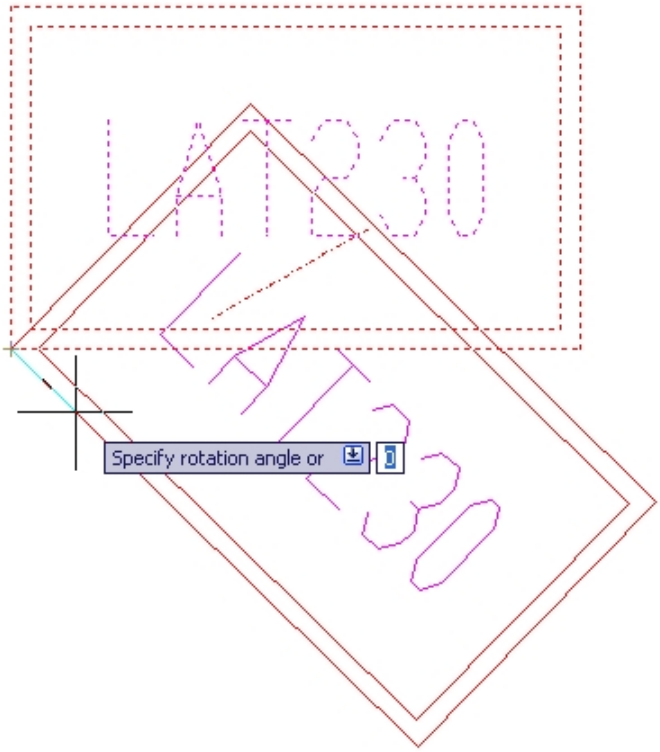
Copy/Rotate- This combines both the copy and the rotate command. The first steps will be the copy, once you select the destination point, you will be prompted for the rotation angle.



Move & Move/Rotate

Using the Move/Rotate commands

Move/Rotate- This combines both the move and the rotate command. The first steps will be the move, once you select the destination point, you will be prompted for the rotation angle.



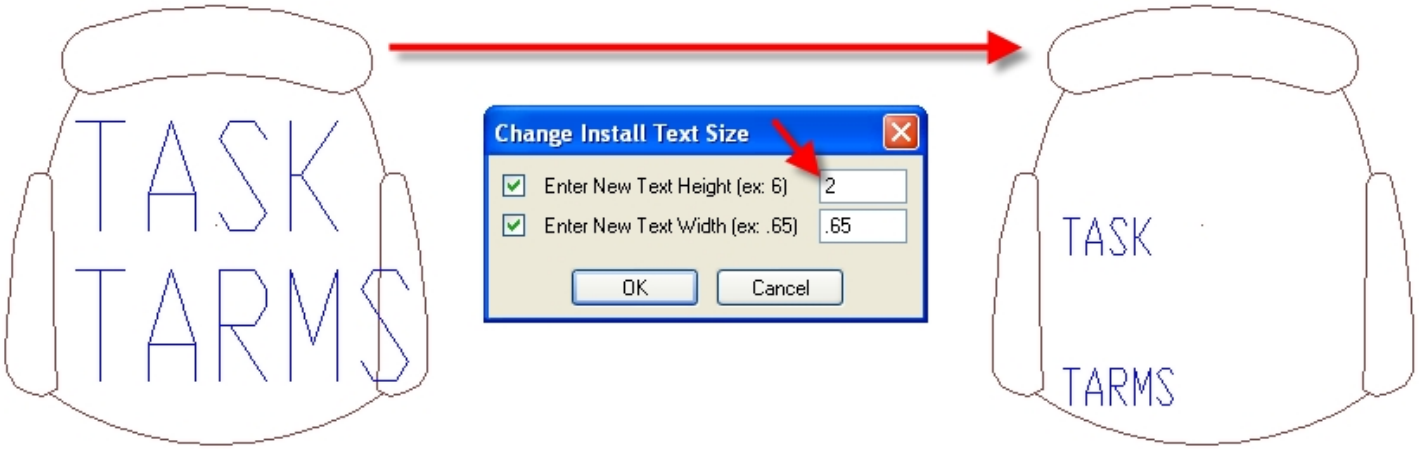
Text Utilities

Install Text

Install Text

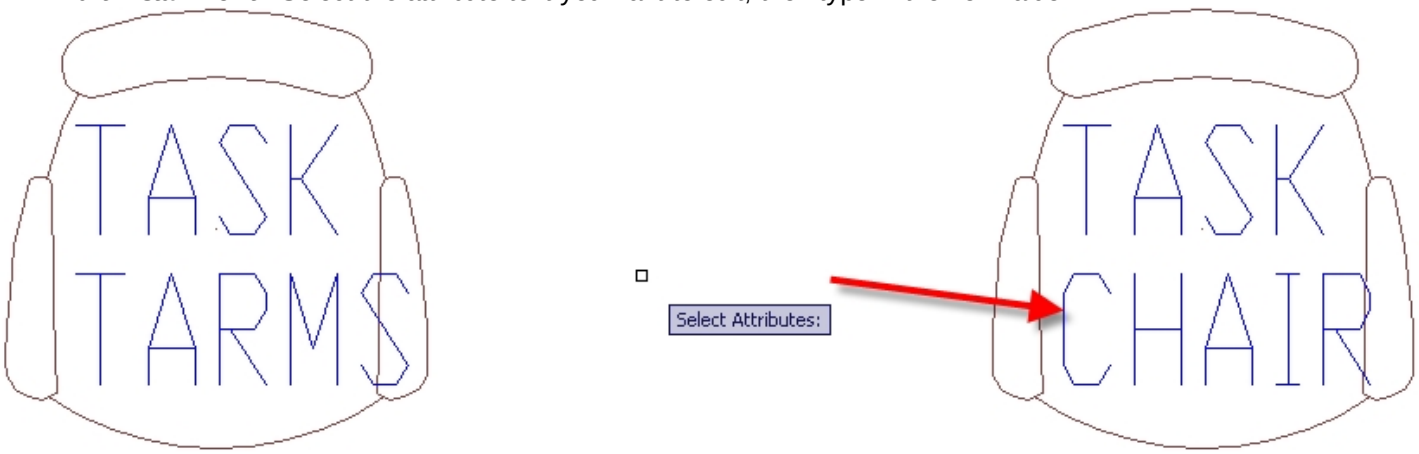
Modifying Install Text

Change Install Text Height & Width- Change text height or width by setting the new size in the dialog box as shown below, then selecting individual blocks or windowing a selection.



Example above: Text was changed from a Height of 6 to a 2.

Edit Install Text- Select the attribute text you want to edit, then type in the new value.



Example above: TARMS was changed to CHAIR

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Move Install Text- Select the attribute text you want to move, and then select the destination point.

Example above: The Install text on the chair was moved to the left of the symbol.

Scale Install Text- Select the attribute text to scale, and either manually scale the text by moving the cursor, or by typing in a value similar to the change Install Text height and width.

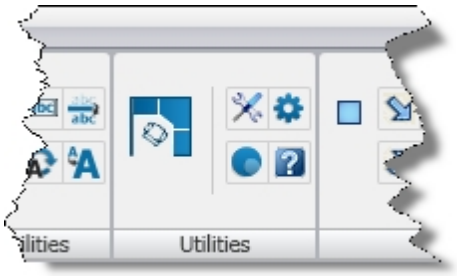
Rotate Install Text- Select the attribute text to rotate and either manually rotate the text by moving the cursor, or by typing in a rotation angle.

Toolpaks

Toolpaks

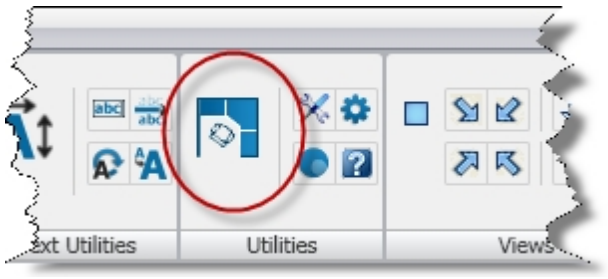
Utilities

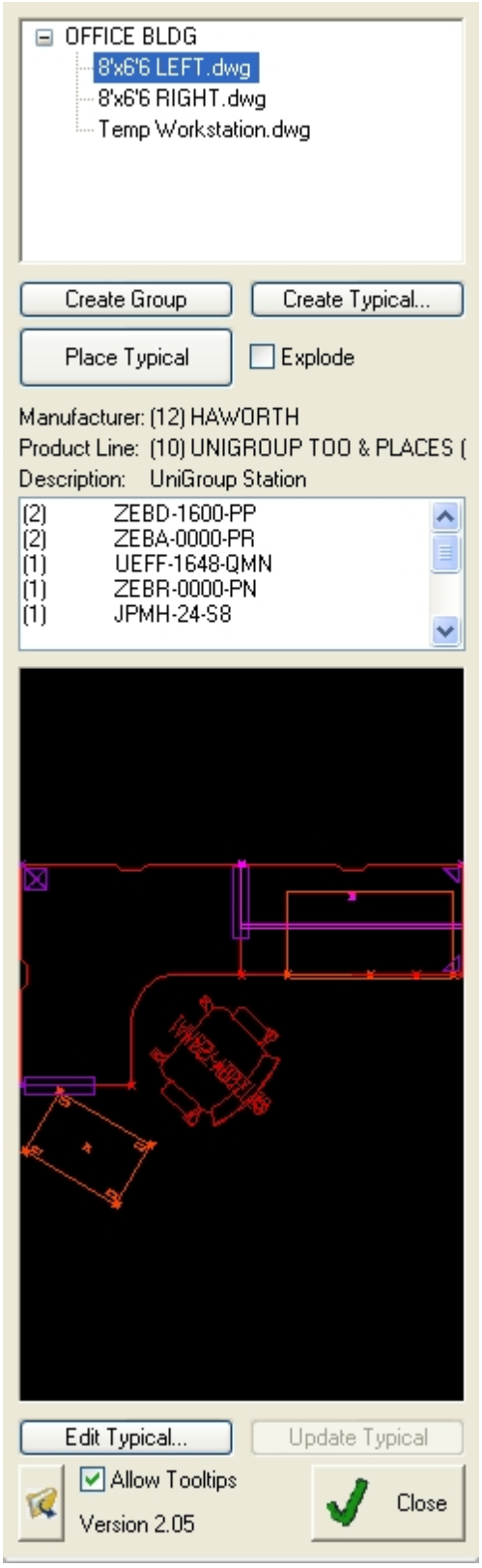
Utilities



Preferences

TypicalManager





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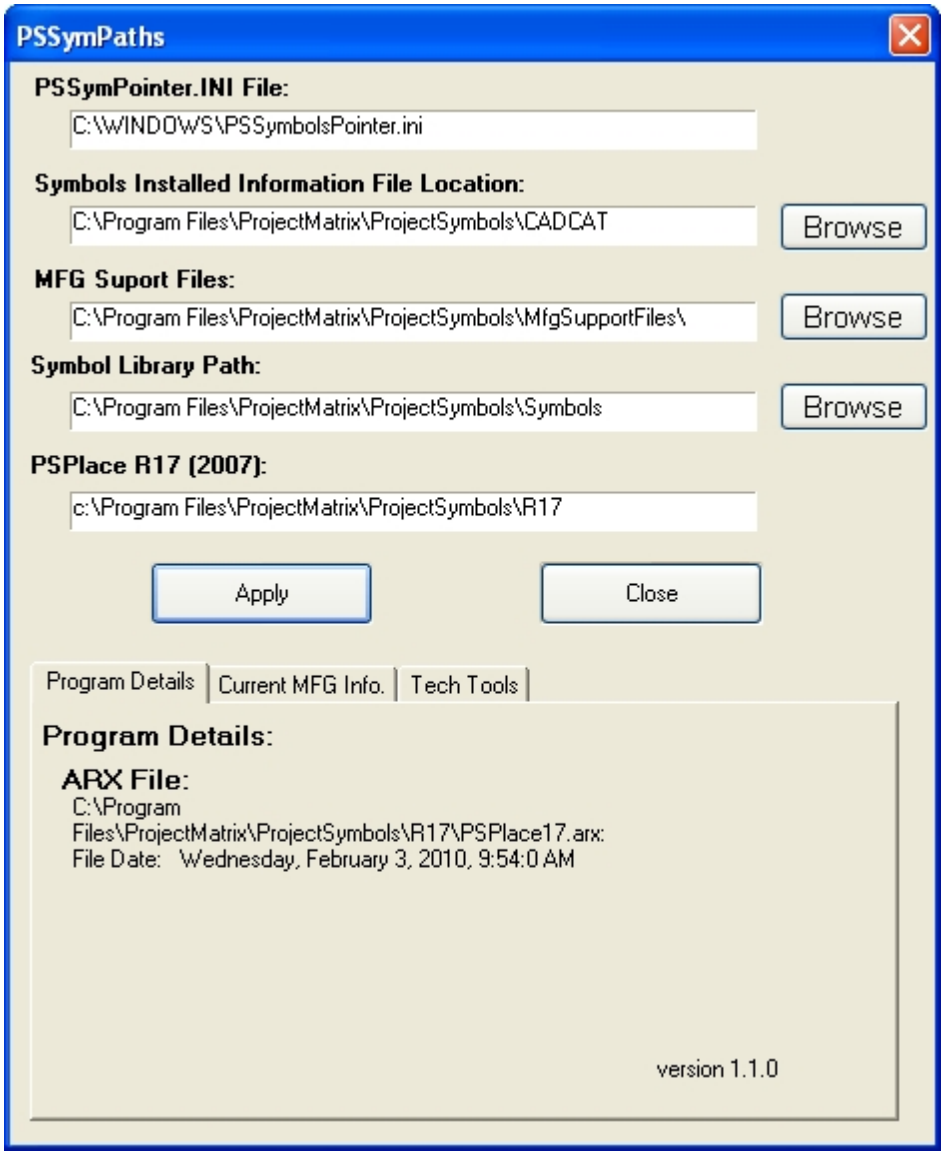
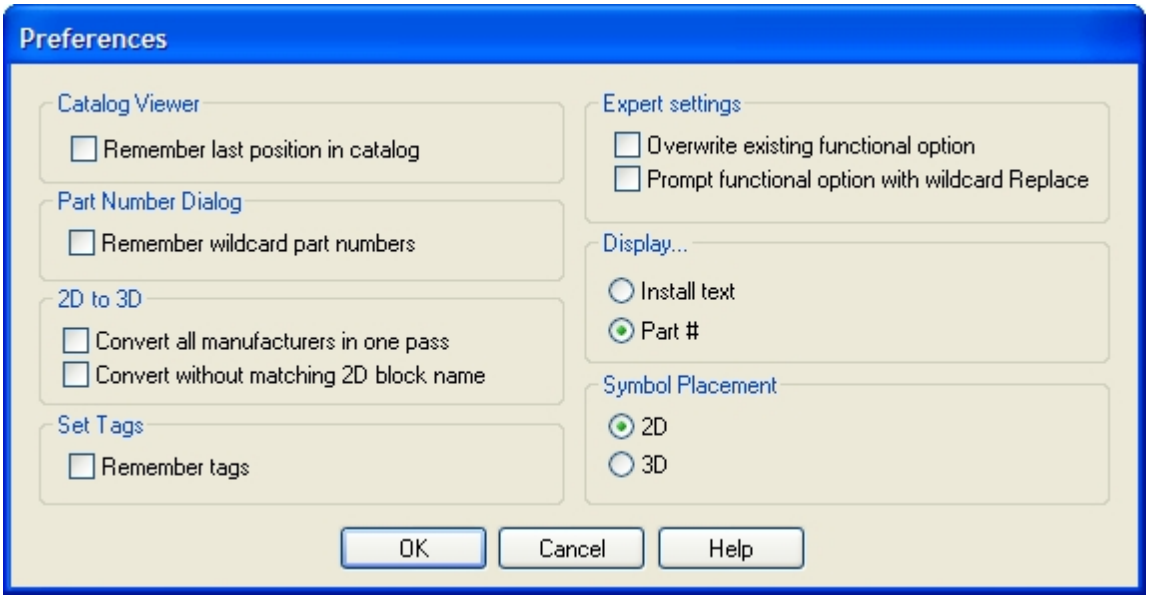
Settings



Preferences



Catalog Viewer-

Remember last position in catalog: Check the box to remember the last position in the catalog. It is recommended you leave this checked. Un-checking this box forces you to select the manufacturer code and dig through the table of contents each time.

Display-

Install Text: Freezes "Part Number Text" and Thaws "Install Text" on symbols containing both sets of text.

Part Number: Freezes "Install Text" and Thaws "Part Number Text" on symbols containing both sets of text.

Set Tags-

Remember Tags: Stores and remembers tags used in the Set Tag command.

Expert Settings-

Overwrite existing functional option:

Prompt functional option with wildcard Replace:

2D to 3D-

Convert all manufacturers in one pass: This will convert multiple manufactures at one time when doing a 2D to 3D conversion. ***Note*** when similar part numbers of different manufactures are found, the symbol will not convert. To convert such parts, change your active MFG and do the conversion again.

Part Number Dialog-

Remember wildcard part numbers:

Symbol Placement-

2D: Places new symbols in 2D "plan" view.

3D: Places new symbols in 3D Isometric view.

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Workspace Utility

Workspace Utility