

Project-Specific Tool Palettes for AutoCAD P&ID Projects

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Summary: Project Specific Tool Palettes

Introduction

Audience: Administrators responsible for setting up project-specific tool palettes

An engineering company can be working on a single project or have multiple projects in the design phase. It is important that all drafters use the same set of symbols. You can set up tool palettes that contain the necessary project symbols and then post the symbols to a centralized, accessible location on the network. If the tool palettes need to be updated, you can make the changes and then re-post the files to the network. Once informed of the updates, your drafters can quickly download the files and proceed with the project.

After creating tool palettes, you organize them into groups. You can associate a tool palette group with a specific project.

This tutorial addresses a scenario where two projects are being designed. For this tutorial, you will create four tool palettes (*A1*, *A2*, *B1*, and *B2*) and add them to two project groups (*Project A* and *Project B*). Change these names as necessary for your projects.

Procedures

Add New Tool Palettes and Populate them with Tools

As the project administrator, you can create project-specific tool palettes with symbols (tools) that drafters use to create drawings.

In the following procedure, you create four tool palettes and then populate each palette with tools.

1. Start AutoCAD P&ID or AutoCAD Plant 3D.
2. Do the following to create four new tool palettes:
 - Right-click the tool palette, and click New Palette.
 - Enter a project-specific name for the first new tool palette (for example, *A1*).
 - Create three more palettes and give them project-specific names (for example, *A2*, *B1* and *B2*).

3. Do the following to populate the new palettes with tools.
 - Open an existing tool palette (for example, *Valves*).
 - Right-click a tool, and click Copy.
 - Open the first new palette you created (*A1*).
 - Right-click the tool palette, and click Paste.

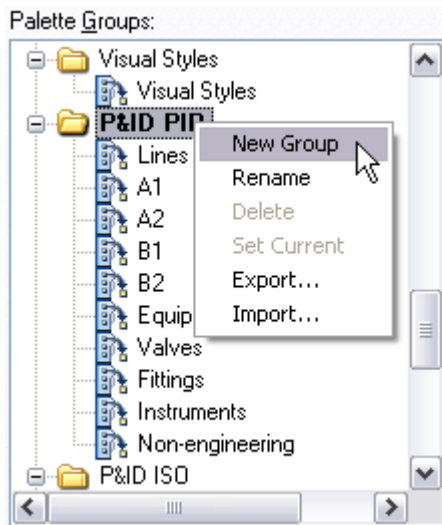
Note: When you create a tool palette, make sure you add tools from one symbol standard only. For example, do not add ISO tools to a tool palette in a PIP project. Otherwise, drafters might encounter problems with missing symbols.

- Continue copying and pasting until you add at least one tool to each new palette.

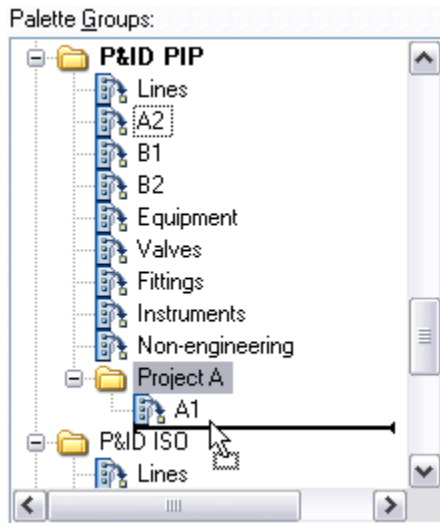
Organize the New Tool Palettes into Groups

After you create the tool palettes, assign groups for each project.

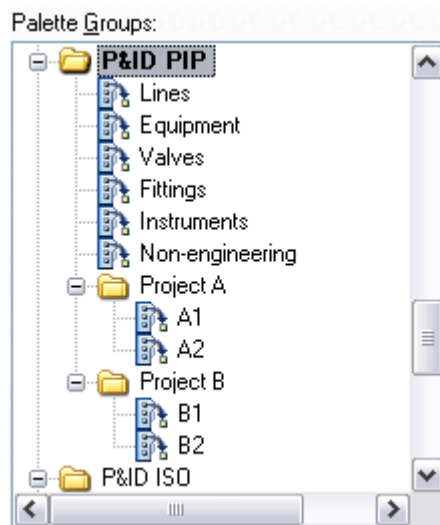
1. At the AutoCAD P&ID or AutoCAD Plant 3D Command prompt, enter **customize**.
2. In the Customize dialog box, Palette Groups pane, scroll to find the P&ID PIP group.
3. Right-click the P&ID PIP folder, and click New Group.



4. Enter a project-specific name for the new group (in this example, *Project A*).
5. Drag the first two palettes you created (*A1* and *A2*), and drop them into the group (*Project A*).



6. Right-click the P&ID PIP folder to create a second group (*Project B*).
7. Drag the second pair of palettes you created (*B1* and *B2*) and drop them into the second group (*Project B*).



8. In the Customize dialog box, click Close.

Copy the ToolPalette Folder to the Network

To give drafters access to the new tool palettes, copy the *ToolPalette* folder to the network server, in a location that is accessible to your drafters.

1. On the local drive, navigate to the following location:
*C:\Documents and Settings\<your user name>\Application Data\Autodesk\AutoCAD PID
 <year>\<release>\<language>\Support (Windows XP) or
 C:\Users\[username]\AppData\Local\Autodesk\AutoCAD Plant 3D
 <year>\<release>\<language>\Support (Windows Vista)*
2. Copy the *ToolPalette* folder from this location.
3. Navigate to the location on the network server where you want drafters to access the tool palettes (for example, *\\MyServer\MyProject\MyPalettes*).

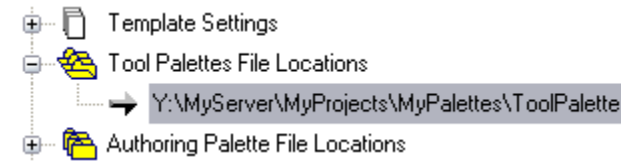
Note: Make sure the server has permissions set to “read-only” so that drafters can access, but not update, the files.

4. Paste the *ToolPalette* folder into the folder you’ve chosen on your server.

Set the Tool Palette File Location and Export an Administrator Profile

The *ToolPalette* folder contains tool palette data only. It does not retain the group settings or path to the tool palettes on the network. Set the tool palette path and export a profile from your system so that drafters can use the new tool palettes and project groups.

1. At the AutoCAD P&ID or AutoCAD Plant 3D Command prompt, enter **options**.
2. In the Options dialog box, Files tab, do the following:
 - Expand the Tool Palettes File Locations path.
 - Select the existing file location, and click Remove.
 - Click Browse and set the file location to the *ToolPalette* folder that you copied to the server (for example, \\MyServer\\MyProject\\MyPalettes\\ToolPalette).



3. Click Apply to set the new tool palette path.

Note: Apply the change to the tool palette path before you export the administrator profile.

4. On the Profiles tab, do the following:
 - Click Export.
 - In the Export Profiles dialog box, Save In field, navigate to the server location where you want drafters to access the administrator profile (for example, \\MyServer\\MyProject\\MyPalettes).
 - In the File Name field, enter a name for the administrator profile (for example, *MyProfile.arg*).
 - Click Save.
5. Click OK to close the Options dialog box.

Note: The exported administrator profile retains the tool palette structure, the current state of the tool palettes, and the new tool palette path.

Import the Administrator Profile to the Drafter Systems

When you post the administrator profile, inform drafters that new files are available and provide the network location. When the drafter imports the administrator profile, the project groups and tool palette path are automatically set.

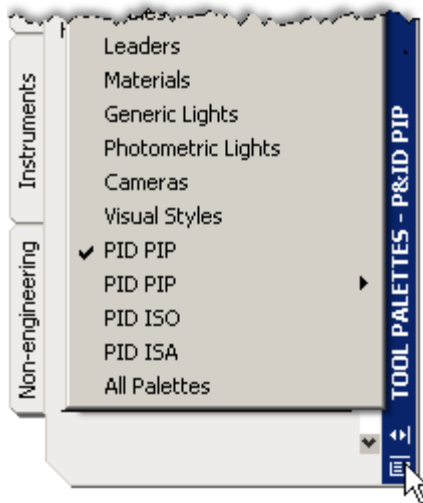
1. On each drafter’s workstation, start AutoCAD P&ID or AutoCAD Plant 3D.
2. At the Command prompt, enter **options**.
3. In the Options dialog box, Profiles tab, click Import.
4. In the Import Profile dialog box, do the following:
 - In the Look In field, navigate to the server location where the administrator profile is located (for example, \\MyServer\\MyProject\\MyPalettes).
 - In the File list, select the administrator profile (for example, *MyProfile.arg*).
 - Click Open.
 - In the Import Profile dialog box, enter a description for the profile, and click Apply & Close.

- After the administrator profile is imported, click Set Current.
5. Click OK to close the Options dialog box.

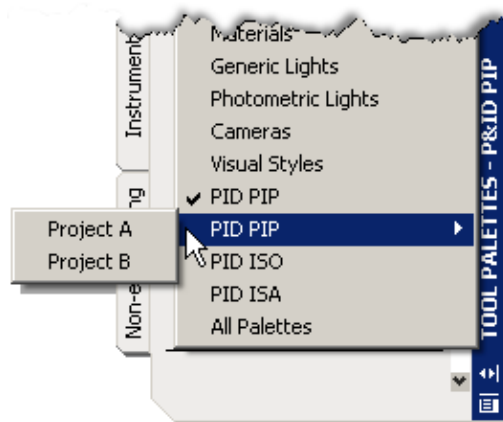
Open a Project and Switch the Project Palettes

Drafters can open the tool palette they need to use for a particular project. If assigned to another project, drafters can quickly access the tool palette for their new assignment.

1. On each drafter's workstation, start AutoCAD P&ID or AutoCAD Plant 3D.
2. Click Tools menu > Palettes > Project Manager.
3. In the Project Manager, do one of the following to open a project:
 - Click the Project Name list, and click the file path that contains a previously opened project.
 - Click the Project Name list, and click Open. In the Open Project list, find the folder with the name of the project you want to open and select the *project.xml* file it contains. Click Open.
4. In the Project Manager, in the project tree, double-click a drawing.
5. In the Tool Palettes – P&ID PIP, click Properties.



6. Right-click the second instance of PID PIP. Click the palette you want to use for the currently loaded project (*Project A* or *Project B*, in the examples used previously).

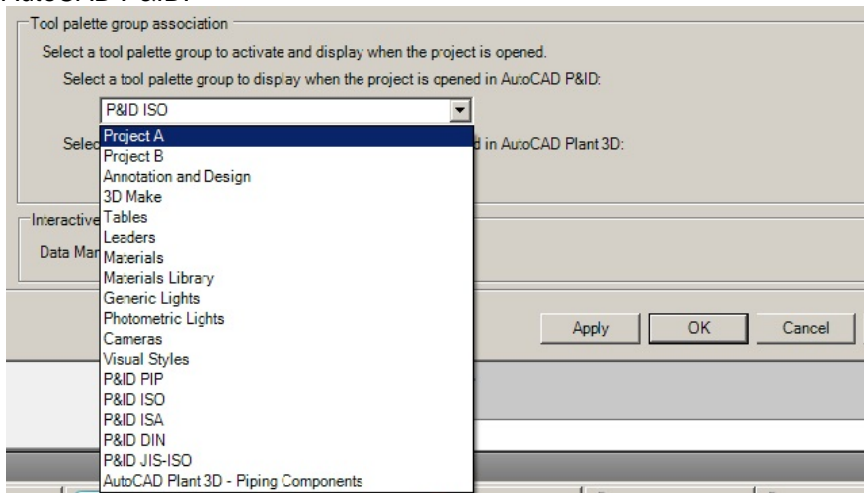


TIP When you open a project drawing, verify that the correct tool palette group is active by repeating this step.

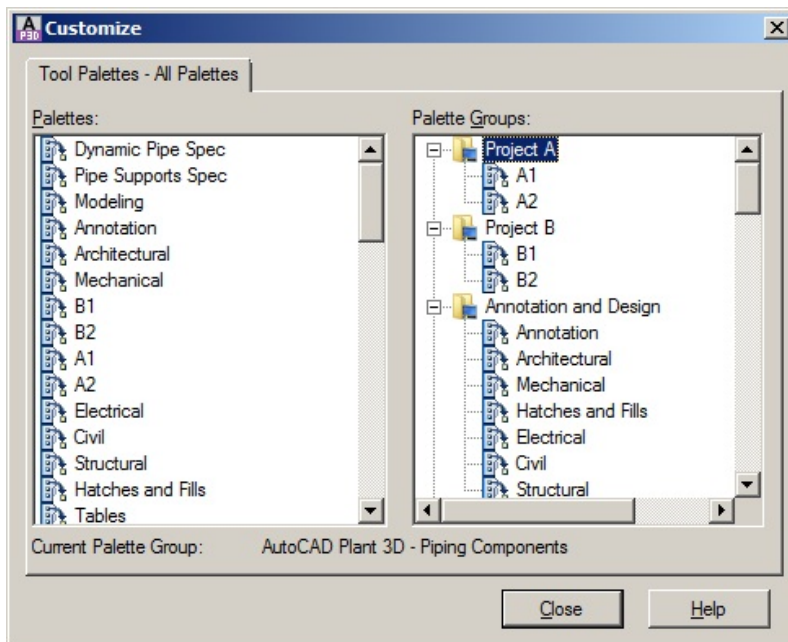
Associate a Tool Palette Group to a Project (Project Administrator)

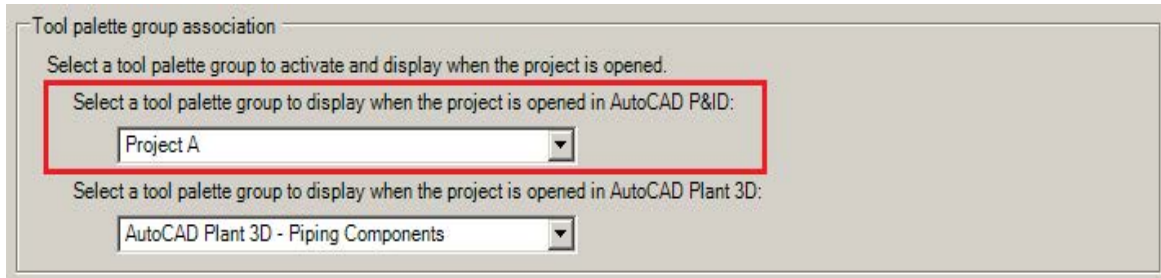
You can associate a palette group to a particular project, so that the tool palette group is active by default each time drafters open the project.

1. In the ribbon, click Project Manager > Project Setup. In the tree, click the Project Details node.
2. Under Tool Palette Group Association, select a tool palette group to display by default for AutoCAD P&ID.



3. If you have created a new folder containing tool palettes in the Customize dialog box, you can select it in Project Setup as shown here:





Update Tool Palettes (Project Administrator)

If you need to update the tool palettes or create a new project palette, you can make the necessary changes, export a new profile, and let the drafters know that the updated content is available.

1. On your administrator system, start AutoCAD P&ID or AutoCAD Plant 3D.
2. Create a new tool palette:
 - Right-click the tool palette, and click New Palette.
 - Enter a new project-specific name for the tool palette (for example, Q1).
3. Do the following to populate the new palette with tools:
 - Open an existing tool palette (for example, *Equipment*).
 - Right-click a tool, and click Copy.
 - Open the new palette you created (Q1).
 - Right-click the tool palette, and click Paste.
4. At the Command prompt, enter **customize** and do the following;
 - In Customize dialog box, Palette Groups pane, scroll to the P&ID PIP group.
 - Right-click the P&ID PIP folder, and click New Group.
 - Enter a project-specific name for the new group (for example, *Project Q*).
 - Drag the new palette (Q1), and drop it into the new group (*Project Q*).
5. Click Close.
6. At the Command prompt, enter **options** and do the following;
 - In the Options dialog box, Profiles tab, click Export.
 - In the Export dialog box, Save In field, navigate to the server location where drafters access the administrator profile (for example, \\MyServer\\MyProject\\MyPalettes).
 - Select the administrator profile you originally exported. Click Save.
 - When prompted to replace the existing file, click Yes.
7. Click OK to close the Options dialog box.
8. Notify your drafters that an updated administrator profile is available.

Update Tool Palettes (Drafters)

When you have updated a tool palette, inform your drafters that they need to update the administrator profile on their workstations to see the updated content.

Provide the following instructions to your drafters:

1. Start AutoCAD P&ID or AutoCAD Plant 3D.
2. At the Command prompt, enter **options**.
3. In the Options dialog box, Profiles tab, do the following;
 - Select <<Unnamed Profile>>. Click Set Current.
 - Select the administrator profile (for example, *MyProfile.arg*). Click Delete.
 - Click Yes to confirm that you want to delete the profile.

- Click OK to close the Options dialog box.
- 4. Exit and restart AutoCAD P&ID.
- 5. At the Command prompt, enter **options**.
- 6. In the Options dialog box, Profiles tab, do the following;
 - Click Import.
 - In the Import Profile dialog box, Look In field, navigate to the server location where the administrator profile is located (for example, *\\MyServer\\MyProject\\MyPalettes*).
 - In the File list, select the administrator profile (for example, *MyProfile.arg*).
 - Click Open.
 - In the Import Profile dialog box, enter a description for the profile. Click Apply & Close.
 - After the administrator profile is imported, click Set Current.
- 7. Click OK to close the Options dialog box.

Summary: Project Specific Tool Palettes

Project-specific tool palettes allow you to give your drafters the tools necessary to complete their projects. Once palettes are set up and organized, you need to export a profile and let the drafters know where they can access and import the profile. The palette structure and tool palette path is maintained in the administrator profile.



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