AutoCAD[®] P&ID in a Multi-User Environment

During this session we will go step by step through the process of setting up AutoCAD P&ID in a multiuser network environment. You'll learn the subtleties of utilizing project files (symbols and tags) in a network environment with the project team. Offsite project members will need access to the same project information as those in the office. You'll be shown how to supply those members with the project files.

Key Topics Covered:

- Setting up a multi-user network environment
- Utilizing project files with all project members
- Offsite access to current project data

Which environment do you work in? Single- or multi-user?

Single user:

- 1. Project and settings locations
 - Out of the box or user altered settings on local computer
 - Project stored on users hard drive or in a project folder on a common network
 - Works on projects other than P&ID
 - Company or individual's custom blocks

The Settings

Whether you're Single or Multi, most people (or the network admin) will install AutoCAD and then when he is out of site, we begin making subtle changes to make the installation our own. AutoCAD P&ID is no exception. Users can make changes to the interface, command line commands (pgp file), background colors, styles etc. Anything to make AutoCAD comforting, personal and productive to the user.

Out of the box and installed, all AutoCAD P&ID installations look just the same at Vanilla AutoCAD. Opening up the 'Options' dialog box and scrolling through all of the search paths and file locations, the new installation will look the same as most all other AutoCAD installations. Why? Because it's still an AutoCAD.

A Options	x
Current profile: < <unnamed profile="">> 🧎 Current drawing: Drawin</unnamed>	g1.dwg
Files Display Open and Save Plot and Publish System User Preferences Drafting 3D Modeling Sele	ction Profiles Online
Search paths, file names, and file locations:	
🕀 👘 Support File Search Path	Browse
u → 🚰 Working Support File Search Path	
🕀 🗝 🔁 Device Driver File Search Path	Add
⊞ 📴 Project Files Search Path	Remove
Eustomization Files	
Help and Miscellaneous File Names	Move Up
Text Editor, Dictionary, and Font File Names	Move Down
Print File, Spooler, and Prolog Section Names	
Printer Support File Path	Set Current
Automatic Save File Location Color Book Locations	
Color Book Locations Data Sources Location	
· ···· □ Template Settings	
Tool Palettes File Locations	
Authoring Palette File Locations	
Action Recorder Settings	
OK Cancel	Apply Help

New Project

Before start a new project we need to create it first. In the Project Manager select the dropdown box and pick 'New Project'.

	Contract Name				A	utoCAD P&ID 2013 - NOT FOR RESALE	Drawing1.
Home Insert Annotate Manage View	Output Plug-ins E	xpress Tools	•				
	' Edit [1]: Select Group Ortho [1]: Make Group [1]: Edit Group ic Line Line Group	Run Validation Validate	E B B C B C C C C C C C C C C C C C C C	 ✓ ✓	A Linear -		Measure Utilitie
	ic Line Group	validate	Layers +	BIOCK +	Annotation •	Properties + s	Ounte
PROJECT MANAGER Current Project. Project 7 Onen New Project. Project 4 Default Project 4 Gost 4 UGS_Master update C:\work\P&ID\Partner\Rotring\iso\Project.xml	Isometric DWG Orthographic DWG Source Files	Drawing1					

The 'Project Setup Wizard' appears now. You have a choice now. Start with a standard template project that is in the AutoCAD P&ID directory OR as we will do, 'Copy settings from existing project' (see red marks in the snapshot below). This project should be the one that has included all company standards (line colors, layers, classes etc.) and custom blocks. In a multiuser environment this will be the base that each project is created from.

oject Setup Wizard (Page 1 of 6)	×
Specify general settings	
Enter a name for this project:	
20-21710A	
Enter an optional description:	
Enter an optional <u>d</u> escription.	
Sp <u>e</u> cify the directory where program-generated files are stored:	
Sp <u>e</u> cify the directory where program-generated files are stored: T:\ActiveProject	
T:\ActiveProject	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored:	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files Image: Copy settings from existing project	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files Image: Copy settings from existing project	
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files Image: Copy settings from existing project	•••
T:\ActiveProject Specify the directory where supporting files (such as spreadsheets or Word documents) are stored: T:\ActiveProject\Project 1\Related Files Image: Copy settings from existing project	

Enter in the project name. In this instance I used '20-21710A' as my project name. Description is optional. The project directory will be in 'ActiveProjects' directory which is a network location. AutoCAD P&ID will automatically create the project directory based on the projects 'Name'.

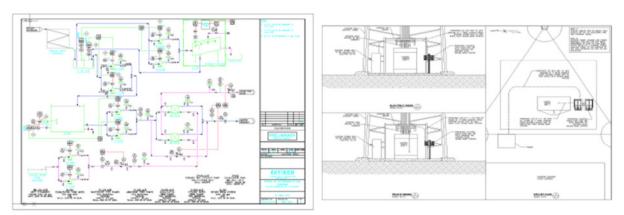
Project Storage Location

Single users will utilize the local hard drive or a company network drive for project storage. Even as a single user in a company environment it is still good to utilize the network. Usually a network has a backup system, so restoring lost or (accidently) deleted files can be done fairly quickly.....in most cases.

The biggest benefit of utilizing the company's network is so others have access to the drawings as well. This is essential in a multi-user, multi-access environment. If you have a network, use it!

Projects

Since the core installation is still AutoCAD, the user has the opportunity to work on projects other than P&ID.

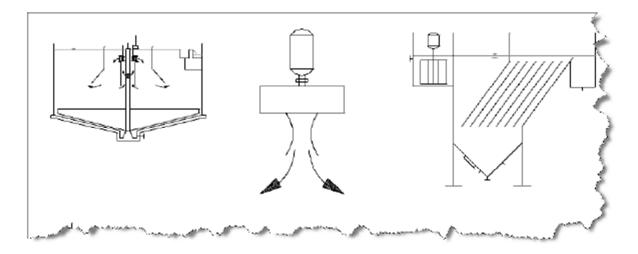


P&ID Project

Site Layout for a Different Project

Custom Blocks

AutoCAD P&ID comes with a robust selection of industry standard blocks. But typically each company develops a custom block library to compliment standard distributed blocks.



(Items shown above: Clarifier, Aerator, Inclined Plate)

Standard Project Set Up

The standard AutoCAD P&ID 2013 project files and folders when a new project is created is shown below:

Jame	Date modified	Туре	Size
Equipment Templates	19.12.2012 11:49	File folder	
ImportExportSettings	19.12.2012 11:49	File folder	
Orthos	19.12.2012 11:49	File folder	
PID DWG	19.12.2012 11:49	File folder	
Plant 3D Models	19.12.2012 11:49	File folder	
Related Files	19.12.2012 11:49	File folder	
ReportTemplates	19.12.2012 11:49	File folder	
Spec Sheets	19.12.2012 11:49	File folder	
StringTables	19.12.2012 11:49	File folder	
DefaultConnectorsConfig.xml	22.02.2012 16:37	XML File	17 KB
Iso.dcf	19.12.2012 11:49	DCF File	64 KB
] IsoPart.xml	19.12.2012 11:49	XML File	2 KB
] IsoPart.xml.plck	19.12.2012 11:49	PLCK File	0 KB
Metric_OrthoPart.xml	19.12.2012 11:49	XML File	5 KB
] Metric_OrthoPart.xml.plck	19.12.2012 11:49	PLCK File	0 KB
] Metric_PipeBendDefaultValues.txt	22.02.2012 16:37	Text Document	6 KB
Metric_PipingPart.xml	19.12.2012 11:49	XML File	17 KB
] Metric_PipingPart.xml.plck	19.12.2012 11:49	PLCK File	0 KB
Ortho.dcf	19.12.2012 11:49	DCF File	77 KB
Ortho.dcfx	22.02.2012 16:37	DCFX File	10 KB
PIP_Metric_PnIdPart.xml	19.12.2012 11:49	XML File	127 KB
PIP_Metric_PnIdPart.xml.plck	19.12.2012 11:49	PLCK File	0 KB
Piping.dcf	19.12.2012 11:49	DCF File	223 KB
Piping.dcfx	22.02.2012 17:23	DCFX File	53 KB
ProcessPower.dcf	19.12.2012 11:49	DCF File	916 KB
ProcessPower.dcfx	22.02.2012 16:38	DCFX File	152 KB
Project.xml	19.12.2012 11:49	XML File	2 KB
projSymbolStyle.dwg	22.02.2012 16:38	AutoCAD Drawing	437 KB
SubstitutionPalettes.xml	22.02.2012 16:38	XML File	76 KB

When you create a new project these are the files that will be generated in the new directory. Note that there are some files which are Plant 3D specific like Piping.dcf. Because of that Plant 3D can open a P&ID project and add or modify some Plant 3D elements. Otherwise P&ID can open a Plant 3D project and also Plant 3D drawings but because of the limitation of P&ID as the sub-application of Plant 3D you cannot edit Plant 3D elements.

Multi-user:

- 1. Project and settings locations
 - a. Out of the box or user altered settings on local computer
 - b. Network settings hosted at a common network location assessable to all users
 - i. CUI File
 - ii. Palettes
 - iii. ARG File
 - iv. Project 'start' files
 - c. Project stored in a project folder on a common network
 - d. Company's specific blocks

The Settings

For a multi-user installation of AutoCAD P&ID many of the same alterations and changes can still be applied on a per user customization with only a few modifications to some shared files.

This next section will illustrate how to set up and deploy a multi-user AutoCAD P&ID installation on a network.

Network Set ups

The CUI, tool palettes, support directories, plotter/printers, plot styles, templates and the arg-file add different and varying offerings to deploying a multi-user network set up. For this class we will focus on utilizing the tool palettes as the primary object for setting up our P&ID multi-user environment. The other items listed previously have been discussed in classes and labs from other presenters. But we will go over them quickly just so that everyone has a refresher course on them. As with any customization of AutoCAD it is always necessary to include those support directories in the 'Options support File Search Path'. The illustrations following the brief descriptions show where in the Options dialog box these additions need to occur.

- **The CUI**: An XML-based file that stores customization data. On startup, the first things AutoCAD loads are its CUI files. It first loads the Enterprise CUI file, then the Main CUI file, then any partial CUI files attached to the Main, then any partial CUI files attached to the Enterprise.
- Support Directories: AutoCAD P&ID uses the same standard commands and settings as AutoCAD pure. These default folders can be copied to a common network drive and be easy to maintain and control. Also, this is a good location to store any custom LISP or .dvb (VBA) files as well.
- **Plotters/Printers:** In the 'Options' dialog box under 'Printer Support File Path'; this would be the location necessary for network printer .stb or ctb or plot style table files
- **Templates:** Here, in the 'Options' dialog box under 'Template Settings'; this would be the location necessary for the drawing template

- The ARG File: The .arg file stores the users profile. Whenever we remember to save it from time to time. This profile tells AutoCAD where the appropriate files will be found. The .arg profile stores where to find the menu files, toolbars and tool palettes. If you save the profile to the network support directory each time you change your toolbars or palettes you'll have a consistent backup just in case you get a new computer or it happens to go down. You can quickly set up another computer to run your 'own' interface quickly and not lose time changing everything to your liking.
- Workspaces: Workspaces are part of the CUI-File and are a set of menus, toolbars, palettes, and ribbon control panels that are grouped and organized so that you can work in a custom, task-oriented drawing environment. When you use a workspace, only the menus, toolbars, and palettes that are relevant to a task are displayed. In addition, a workspace may automatically display the ribbon, a special palette with task-specific control panels. The power of using workspaces makes it possible to operate in different work modes inside AutoCAD. When in a P&ID drawing atmosphere you'll want to make sure your workspace is either set do one of the default workspaces that comes standard with P&ID (PIP, ISA, ISO, ...) or utilize the standard AutoCAD workspace when P&ID and the accompanying palettes and toolbars are not needed. For multi-user environment setup, we are going to create a workspace and save it out to the network for all our users to have.

Select the gear in the bottom right side of the AutoCAD window. When it opens it will look something like this:

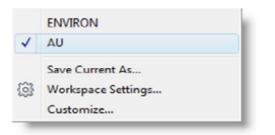
\checkmark	P&ID PIP
	P&ID ISO
	P&ID ISA
	P&ID DIN
	P&ID JIS-ISO
	Drafting & Annotation
	3D Basics
	3D Modeling
	AutoCAD Classic
ŝÊ.	Save Current As
£03	Workspace Settings
	Customize
	Display Workspace Label

In the above illustration, you can see the default workspaces that AutoCAD P&ID delivers in the install. I will Show how to create a new workspace by picking the 'Save Current As....' selection near the bottom of the list.

When this is selected the following window opens to prompt you for a new name:

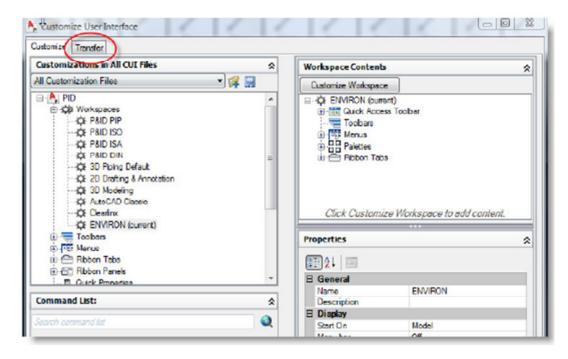
•	Save
	Cancel
	•

Now the new workspace will appear in the list with the rest of the previous workspaces.

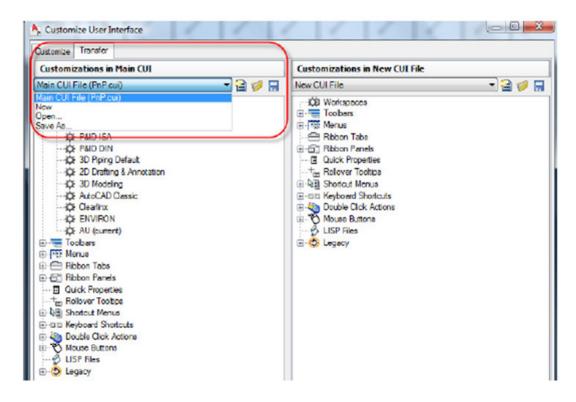


Now, in order to make this available to the rest of your network users we need to export this workspace and all the settings that accompany it to the network support directory. Now select the 'Customize...' button on the workspace list.

The dialog box that appears (next page) looks amazingly like the CUI, oh, but wait a minute, it is the CUI dialog box. But how do we generate a network friendly workspace/CUI for all workers to use?



On the illustration above, I have circled the 'Transfer' tab at the top of the CUI dialog box. Once it is selected the next dialog window appears; select the 'Save As..' option. A save as dialog box will appear and allow you to give the new CUI a new name and an opportunity to save the file in the multi user network setup folder.



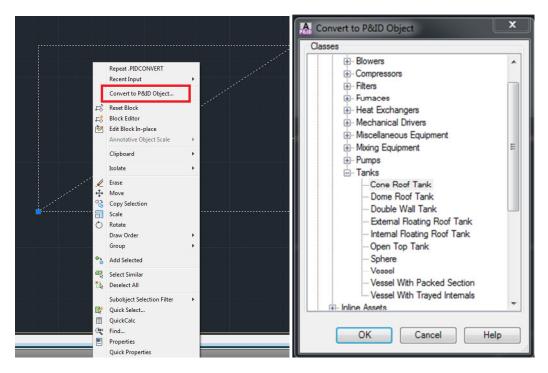
Now your network folder should look something similar to this illustration below. In the picture below, we named the CUI file EnvironAcad09. This folder and the sub-folder will be our repository for all our customized files for AutoCAD 2013.

Name	Date modified	Туре	Size
09 PALLETTES	11/23/2008 3:16 PM	File Folder	
lmages 🔰	11/28/2008 2:20 PM	File Folder	
StringTables	11/28/2008 2:21 PM	File Folder	
la ToolPalette	11/22/2008 7:48 PM	File Folder	
Environ.arg	7/10/2008 3:51 PM	ARG File	235 KB
MikeB.arg	10/14/2008 10:42	ARG File	149 KB
environacad09.bak.cui	10/24/2008 3:59 PM	AutoCAD Custom	2,942 KB
EnvironAcad09.cui	11/21/2008 2:10 PM	AutoCAD Custom	2,955 KB
PIDSymbolBase.dwg	11/4/2008 1:39 PM	AutoCAD Drawing	574 KB
🖣 projSymbolStyle.dwg	10/15/2008 9:09 AM	AutoCAD Drawing	700 KB
TEMP.dwg	10/15/2008 8:58 AM	AutoCAD Drawing	486 KB
Profile.aws	6/27/2008 12:40 PM	AutoCAD Work Sp	94 KB
ProcessPower.dcfx	10/15/2008 9:08 AM	DCFX File	150 KB
environacad09.mnr	11/22/2008 7:52 PM	MNR File	1,929 KB
PnIdPart.xml	10/30/2008 8:17 AM	XML Document	143 KB
ProcessPower.xml	4/10/2008 10:29 PM	XML Document	167 KB
Project.xml	4/10/2008 10:29 PM	XML Document	1 KB
SubstitutionPalettes.xml	10/15/2008 9:09 AM	XML Document	39 KB

How to add custom blocks?

There are two ways to add custom blocks to a P&ID project. Every company has specific equipment and processes they like to use in their designs. In a standard AutoCAD environment most companies have a block library.

The easiest way to add a block to a project is to insert the block into the drawing then right click on it then use the 'Convert to P&ID Object...' command. After clicking on the command the 'Convert to P&ID window opens and allows you to select the property that that the block will assume. It will only be available in the drawing it was converted from and is not available for other drawings.



The best defined way to add a company's specific blocks to the AutoCAD P&ID library is to add it through the projects properties dialog. Right click on 'Project' in the Project Manager and select 'Properties' from the context menu.

After selecting 'Properties' the window below appears. This is the project setup window for AutoCAD P&ID 2013. Since we are adding an item to the Engineering Items we need to expand those sections so we can decide where to classify and add the air grid we started with.

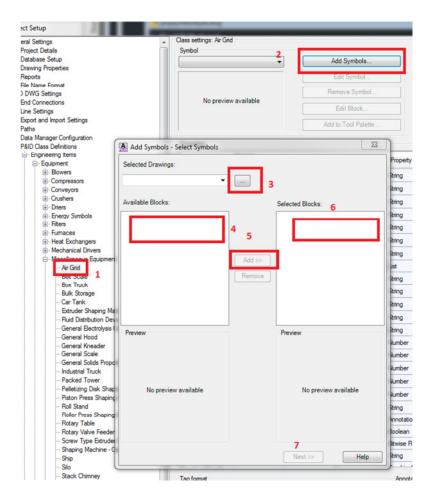
Project Setup	Project datale		
General Settings	Project details		Week bistony amounts
- Project Details - Database Setup	General properties		Work history prompts Automatically prompt for work history when:
- Drawing Properties		0-21710A	 Opening project drawings
Reports File Name Format	Project description:		Closing project drawings
- P&ID DWG Settings	Project number:		
Plant 3D DWG Settings			Never
Isometric DWG Settings	General paths and file locations User-defined reports directory		
	T:\ActiveProject\20-21710A\	ReportTemplates	
	Related files directory:		
	T:\ActiveProject\20-21710A\	Related Files	
	Custom properties		
	Custom categories:	Properties of sel	elected category:
	Project Data	Name	Value
	Client Information	Address	Value
		City	
		State	
		Postal Code	
		Telephone	
		Project Manage	per
	Add Dele	te Add Row.	Delete Row
	Tool palette group association Select a tool palette group to	activate and display the	then the project is connect
			roject is opened in AutoCAD P&ID:
	P&ID PIP	p to alopidy mich alo pro	
			roject is opened in AutoCAD Plant 3D:
	AutoCAD Plant 3D	- Piping Components	•
	Interactive zoom		
	Data Manager interactive zo	om factor: 0.4	
			Apply OK Cancel

Air grid is not a standard item in any of the lists so let's place it in the 'Miscellaneous Equipment' directory under its own equipment type. By right clicking on the miscellaneous directory I have an option to create a new subdirectory. We'll create one called 'Air Grid Demo'.

eneral Settings	Class settings: Misce	llaneous Equipment	1							
- Project Details	Symbol									
- Database Setup			•	Add Symbols						
- Drawing Properties - Reports			-	Edit Symbol						
File Name Format										
&ID DWG Settings	No previe	w available	R	emove Symbol						
- End Connections - Line Settings	No previe	wavaliable		Edit Block						
- Export and Import Settings				to Tool Palette						
- Paths				Tto Tool Talette						
Data Manager Configuration P&ID Class Definitions	Properties									
- Engineering Items	Property Name	Property	Display Name	Default Value	Property Type	Acquisition	Read Only	Visible		Add
		Description				-	-			Edit
Dowers Compressors	*ClassName	System property	Class Name	Miscellaneous E	String	None	V	V		
Conveyors	*Description		Description	MISCELLANEO	String	None			R	emov
	*Manufacturer		Manufacturer		String	None		V		
Energy Symbols	*ModelNumber		Model Number		String	None		v		
	*Supplier		Supplier		String	None		V		
E-Fumaces Heat Exchangers	*Comment		Comment		String	None		V		
Modulariad Birrar	*Tag	System property	Tag		String	None		V		
- Miscellaneous Equinment			-	U	-	None		V		
Belt Sca NewBox Truc Rename	*Type	System property		U V		1.1				
Box Truc Rename	*EquipmentSpec		Equipment Spec		String	None		V		
Car Tank Purge	*Weight		Weight		String	None		V	=	
Extruder snaping machine	*MaterialOfCons		Material of Const		String	None		V	-	
General Electrolysis Cell	*Number		Number		String	None				
General Hood	*Area		Area	Acquisition -	String	General.Drawi				
General Kneader General Scale	DesignPressure		Design Pressure		Number	None				
General Solids Proportioner	Design Temperat		Design Tempera		Number	None		V		
Industrial Truck	Height		Height		Number	None		V		
···· Packed Tower ···· Pelletizing Disk Shaping Machine	Length		Length		Number	None		V		
- Piston Press Shaping Machine										
Roll Stand	Volume		Volume		Number	None		V		
···· Roller Press Shaping Machine ···· Rotary Table	Insulation		Insulation		String	None				
Rotary Valve Feeder	AnnotationStyle			Equipment 🔻						
Screw Type Extruder Shaping Machin	Substitution			True	Boolean					
Shaping Machine - General Coarsenin Ship	SupportedStand			3	Bitwise Flag					
Silo	DisplayName			Miscellaneous E					-	
Stack Chimney				r I						
····· Weighing Platform Floor Scale ⊕- Mixing Equipment	Tag format				Annotation		7			
Nuclear Reactors	Equipment Tag 2 [/ Equipment Tag [Ty	vea-Type-Number] be-Number]		New	Equipment Ta	g T	Add Ar	notation		
Pumps				Modify			Edit An	notation		
i∄- Tanks ⊞- Inline Assets										
. Instrumentation				Delete	#(Equip	<u>ment.T</u> agi	Remove	Annotation		
							Edit	Block		

After creating our sub classification for the air grid pick 'Add Symbol' so we can add the block from our library.

The inset window below shows the information and settings I added after selecting the Air_Grid.dwg in our block library. I want the part to be on the Equip layer, also I want to allow it to be scaled, prompted for a tag number and designation, it's at the 'Endline' and I want to add a nozzle to it as well.



The following illustration shows my air grid in the 'Symbol' list and I have options to 'Edit Symbol, Remove, Edit Block and Add to Tool Palette'. Today all I'm going to do it add the Air Grid to my palette for me and everyone else to use.

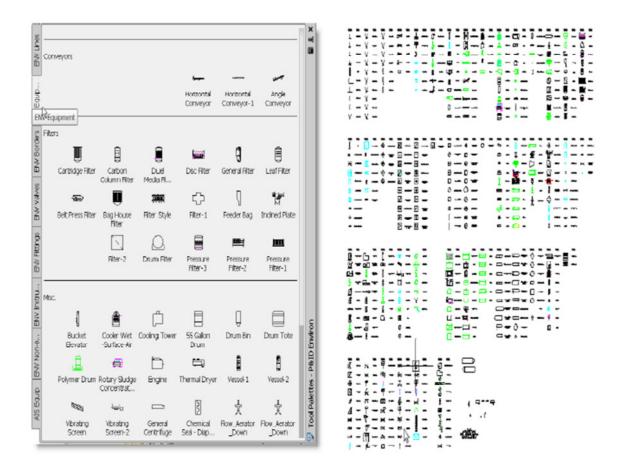
ings	Class settings: Air Gr	rid								
Details	Symbol									
e Setup	AirGrid			Add Symbols	_					
Properties	(Alicelia			_	_					
				Edit Symbol						
e Format				emove Symbol						
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nections				Edit Block						
ings nd Import Settings										
in subor conside			Ado	to Tool Palette						
nager Configuration					-					
ss Definitions	Properties									
neering items		Property	-	-	_	_		-		
quipment	Property Name	Description	Display Name	Default Value		Property Type	Acquisition	Read Only	Visible	
- Blowers	*ClassName	System property	Class Name	ArGrid		String	None	V	v	
Compressors Conveyors	*Description		Description	AirGrid		String	None		V	
- Crushers	*Manufacturer		Manufacturer			String	None			
 Driers Energy Symbols 	*ModelNumber		Model Number			String	None			
Filters	*Supplier		Supplier			String	None			
Fumaces Heat Exchangers	*Comment		Comment			String	None			
Mechanical Drivers	*Tag	System property	Tag			String	None			
- Air Grid	= *Type	System property	Туре	U	-	List	None	V	V	
Dek Judie	*Equipment Spec		Equipment Spec		_	String	None			
Box Truck Bulk Storage	"Weight		Weight			String	None			
Car Tank	*MaterialOfCons		Material of Const			String	None			
Extruder Shaping Machine Fluid Distribution Device	*Number		Number		-	String	None			
General Electrolysis Cell	*Area		Area	Acquisition	-	String	General Drawi			-1
General Hood					100		Gronner di. Di dini			

Show below, the air grid is shown with some of the other custom blocks that have already been added to the palette.



Multi-user Tool Palettes (with custom blocks added)

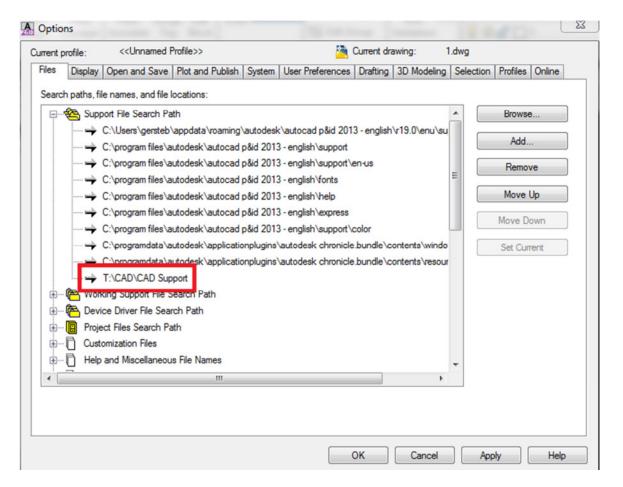
Project tool palettes are a popular tool to use. AutoCAD P&ID utilizes tool palettes out of the box for the installed standards that come in the package. But, as projects progress or with existing company standards, additional blocks will need to be added to the project set up files. By default, the projSymbolStyle.dwg located in the root directory of the AutoCAD installation retains or references all of the standard blocks that are inserted by way of the tool palettes into the drawings. In a multi-user environment the trick is how you make sure that everyone is using the same tools to work with on the same network projects.



Above, the palette on the left is part of our P&ID ENV (Environ) Equipment palette. Looking at the additional tabs on the left, all of them have a custom name. As we have done, you can add your own custom blocks to the project and project palettes. The illustration on the right are all the custom and typical blocks we utilize on many projects. The blocks shown in green are what we determined were already included in the standard P&ID install. All the rest were added into the network project file.

Previously we discussed adding a block to the existing library file (projSymbolStyle.dwg). But what if you have a lot of blocks to add to the library?

The best way to include a large number of to a project is to create a master block file. The name you give this block file is at your discretion and it must be available on the network. Preferably in the custom resource directory where each AutoCAD P&ID install will be directed, through the options dialog box support file search path to include.



In one of the previous illustrations it showed one of our custom palettes and the block library. The block library is all in one drawing. We did this for control. The thought of having custom blocks all over the network in different directories and on users hard drives does not offer much hope in maintenance and nor commonality between drawing sets. The custom block illustration shows over 400 blocks that were used prior to our adoption of AutoCAD P&ID and is still maintained today.

Earlier we walked through the process of added a block the P&ID library. Adding the blocks from the master block file is the same process. Only difference is there is one file to search for, not one block, one file, anywhere.

Block add process rewind: Right click on the project name in the Project Manager. Click on 'Properties' in the pop up window. Select the appropriate equipment category to place the block or create a category for it (right click 'New' or 'Rename').

In order to utilize all palettes from a network resource the AutoCAD options need to be directed to that resource. As shown earlier, the file options 'Tool Palettes File Locations' needs to be pointed to the network resource folder. All users file options must be set to the same location in order for all to utilize the same palettes.



The following process will show everyone how to export and create a custom palette.

- In AutoCAD 2009 right click on the tool palette. The following dialog opens up.
- Click on the 'Customize Palettes' command.
- Now the Palette Customization window opens up.
- Now right click and select 'Export'. The file save dialog box opens up and allows you to save the exported palettes to the network folder.

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- After exporting all the custom tool palettes to the network folder it's a good time to change the 'Tool Palettes File Locations' to the network file location.
- Finally you can import the palettes back in. The software will place the palette on the left side palettes list. Do this till all the palettes have been added back into the list as shown below.

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• Now you can drag and drop the imported palettes into the palette group on the right. The palette group can be created by entering a new name, renaming one of the standard group names or importing an exported group.

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Offsite use

Inevitably, working on a project away from work is sometimes a necessity. Whether it's taking work home, combining work with another office location or working with an outside contractor; working with the same project files is paramount to the success and continuity of the project. Many of the processes we've already presented will allow offsite design to run in tandem with the office project.

Here are the steps for working on a project offsite or in conjunction with another office:

- Copy the project directory. All files in the project directory!
- Copy all the support files
- Export all the palettes
- Include this PDF document so they can learn how to utilize the same data