

SHORT SHARP MANUALS
1701
Resource
Manager &
Libraries



archoncad.com
Making Vectorworks easy!
<http://learn.archoncad.com>

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Introduction

The Resource Manager is an extremely important part of your Vectorworks interface. It allows you to look for resources (hatches, line styles, wall styles, plants, et cetera). So it's important that we understand how to use it because it will make you more efficient and improve your productivity.

The Resource Manager palette that you see on your screen is just one part of the total concept. Vectorworks uses the Resource Manager for many objects and tools to allow you to find the resources that you need when you use that tool.

In simple terms, the Resource Manager allows you to look into other files to get the resources that you need to complete your project. It allows you to connect favourite files to make it easy to find what you're looking for, it includes a search facility to allow you to search through everything for a particular resource, and also includes an ability to tag objects with a keyword, allowing you to search for objects that match that keyword.

This manual has been divided into three main sections:

- Beginner – this covers the fundamental concept of the Resource Manager
- Intermediate – this covers the more advanced concepts related to the Resource Manager
- Advanced – this area covers the advanced topics such as how to move resources, how to manage your library, and so on.

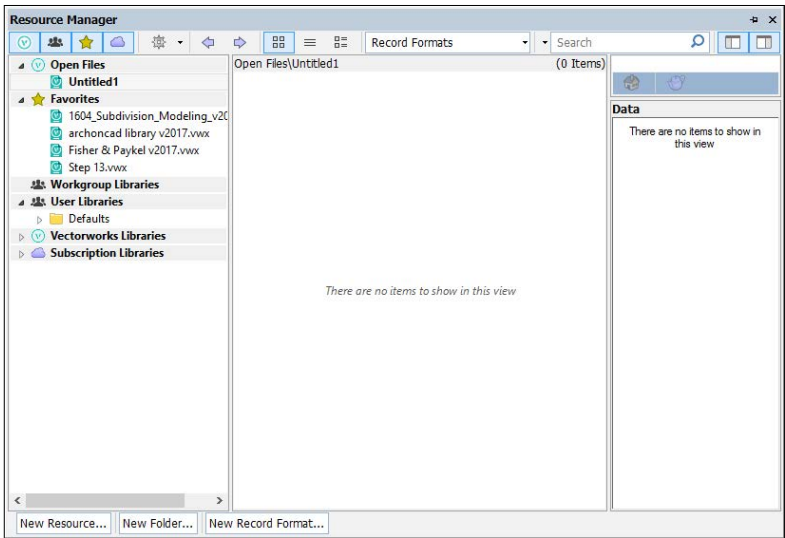
Basic Techniques

Introduction To The Resource Manager

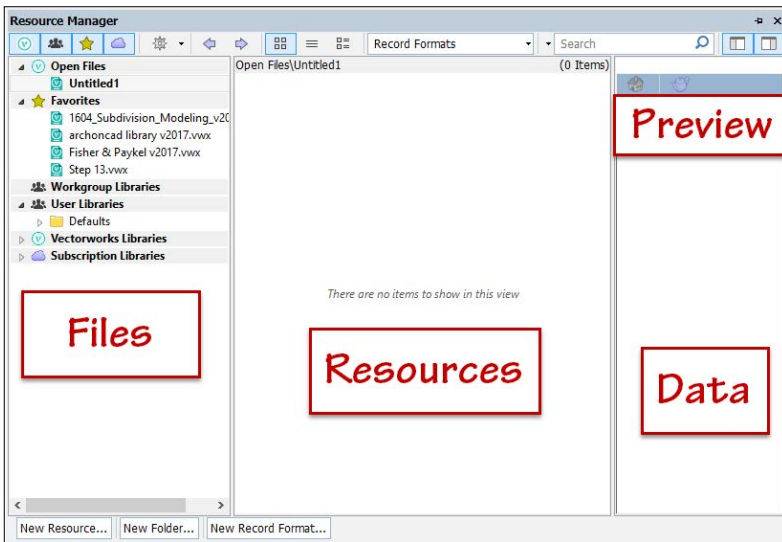
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When you look at the new Resource Manager, it may look like an updated Resource Browser, but it is much more than that. The Resource Manager has been embedded throughout Vectorworks. This means that whenever you look for a resource, the Resource Manager will appear showing you the best results. The Resource Manager can look for files on your computer, and your favourites, in your user folder, and your workgroup folder, in the Vectorworks libraries (some are on your computer and some are online), and in the Vectorworks subscription libraries (VSS).

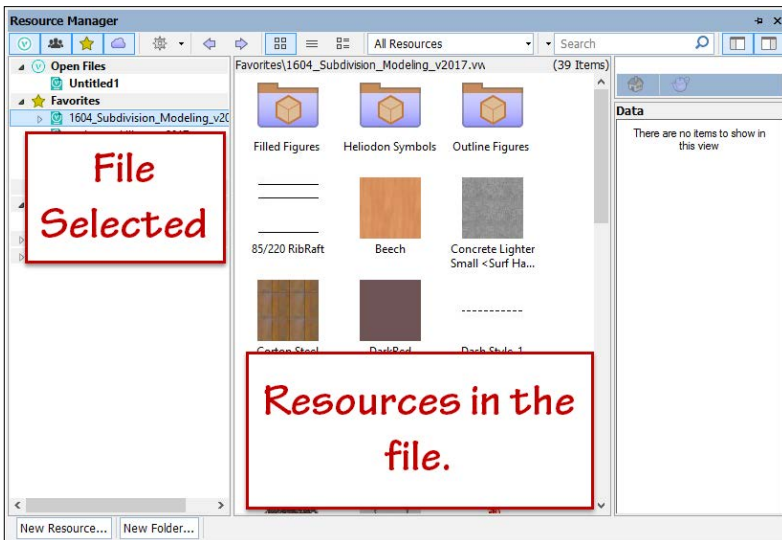
- The Resource Manager has its own palette, much like the old Resource Browser.



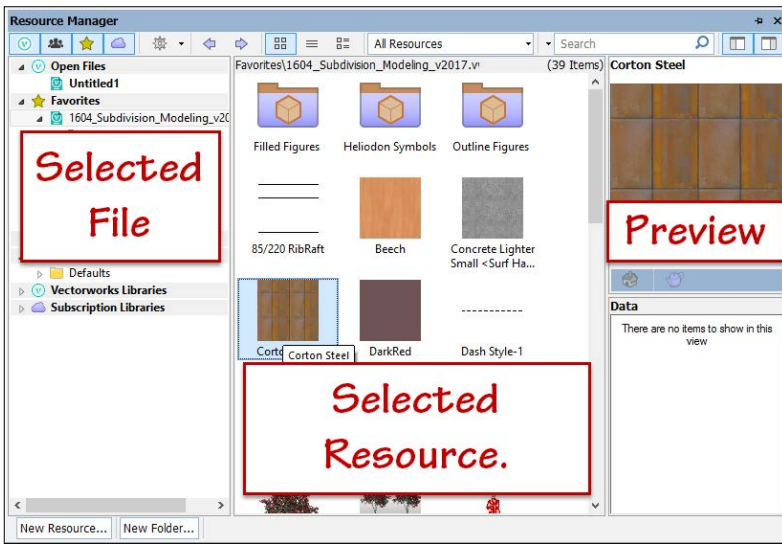
- The Resource Manager is divided up into four main parts.



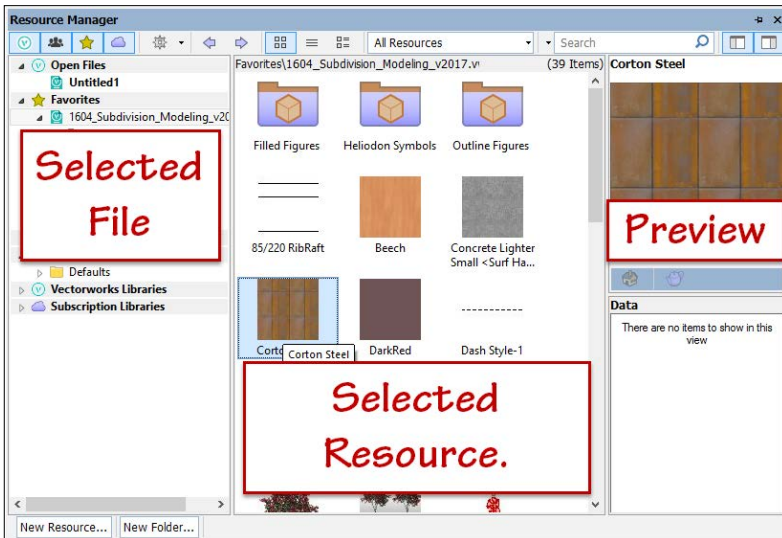
- The Files area is used to choose the source file. This is where you can choose a library file, an online file, et cetera.



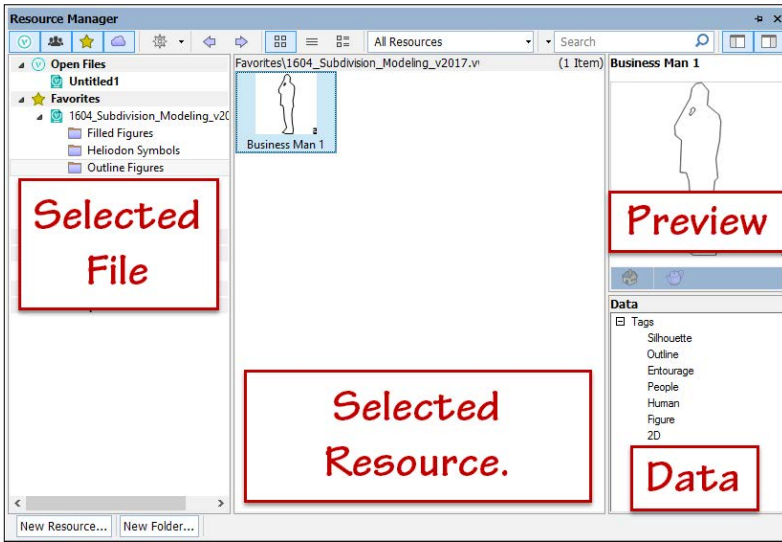
- When you have selected a file, the middle pane will show you all the resources that are available in that file.



- When you select the resource, the right-hand pane will show you a preview of the resource.



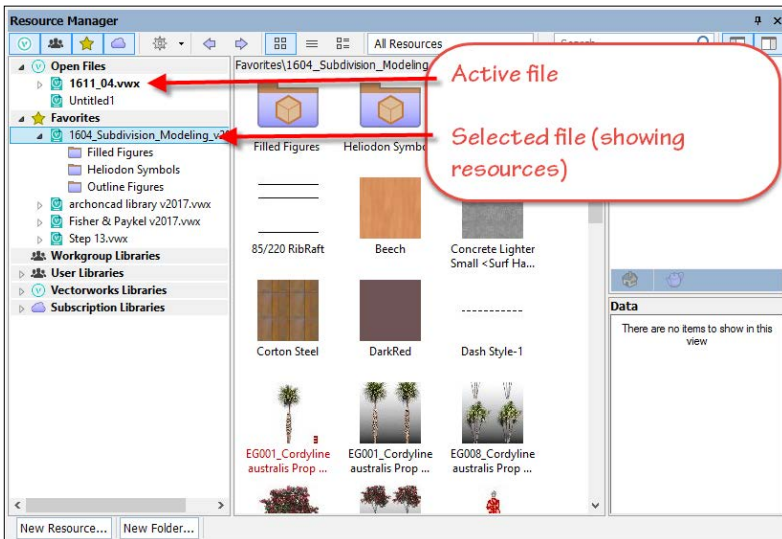
- The bottom right pane will show any data that is attached to the resource.



Selecting A File

The Resource Manager has the ability to show you the resources in a file, but you can choose which file you will be looking at.

In this image you can see one of the files is open on the screen (the file shown in bold). But a different file is selected to view the resources.

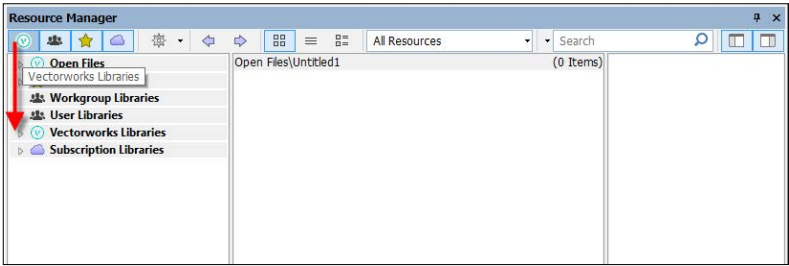


To show the resources from a particular file, click on it in the left-hand pane, the Resource Manager will then show all the resources in that file.

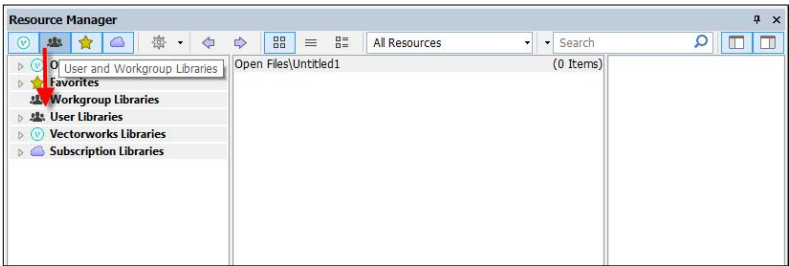
Resource Manager Libraries

The Resource Manager will show you resources from four major areas. the visibility of the files in these areas is controlled by a series of icons at the top left corner of the Resource Manager.

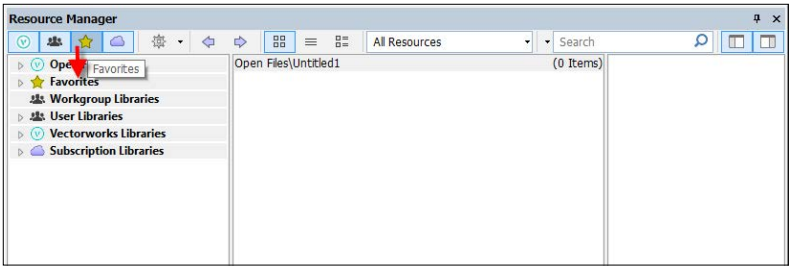
- Vectorworks Libraries



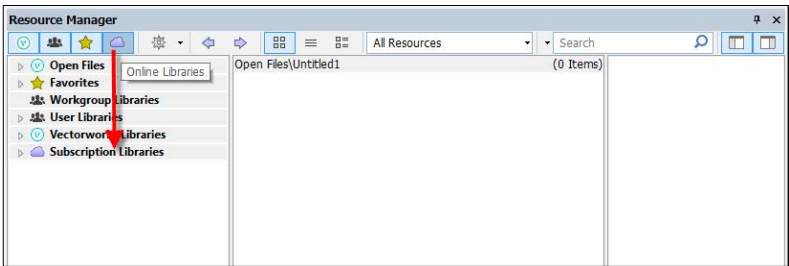
- Workgroup and User Libraries



- Favourites

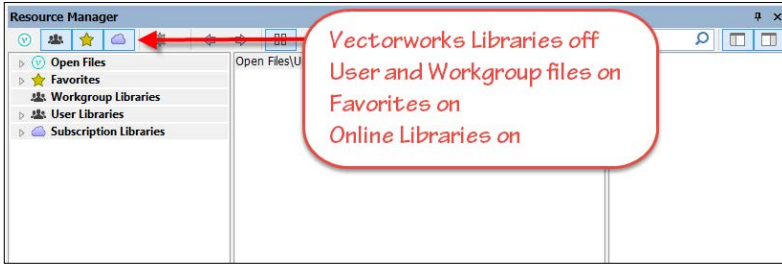


- Subscription Libraries

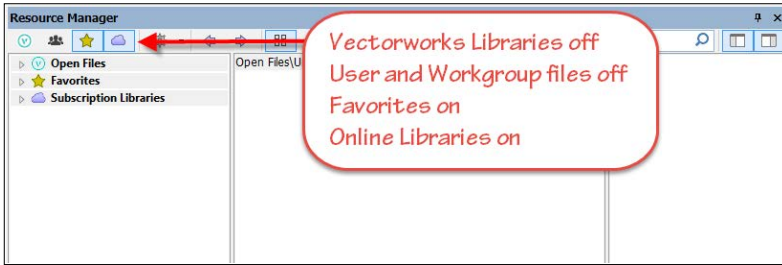


- You can choose to show these four categories or you can choose to hide them by clicking on the icon. You can click on the icon once to hide the resources in the area. Clicking on the icon again will show the resources from that area.

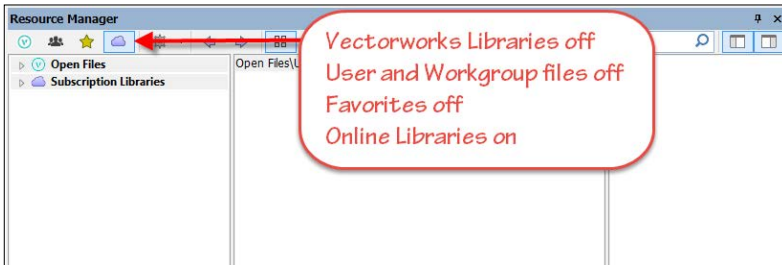
- Click on the Vectorworks Libraries icon to hide resources in that area.



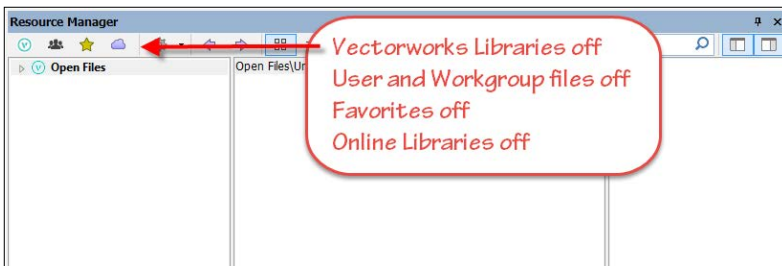
- Click on the User and Workgroup icon to hide the resources in that area.



- Click on the Favorites icon to hide the resources in that area.



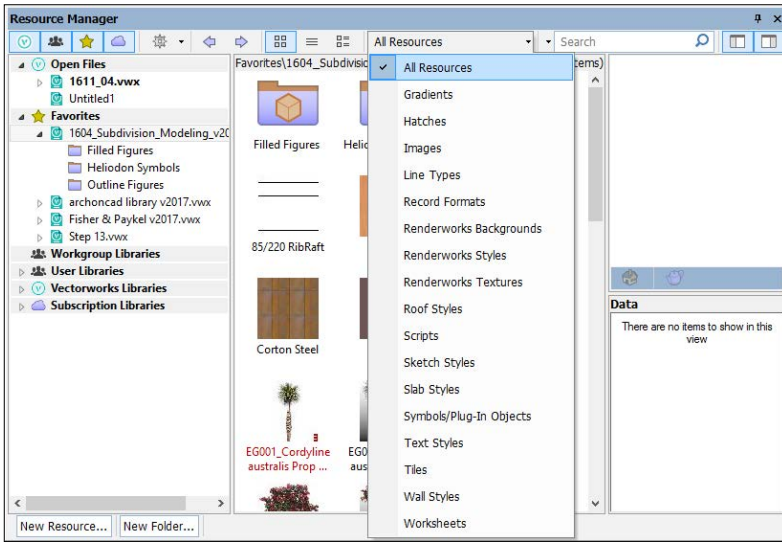
- Click on the Online Libraries icon to hide the resources in that area.



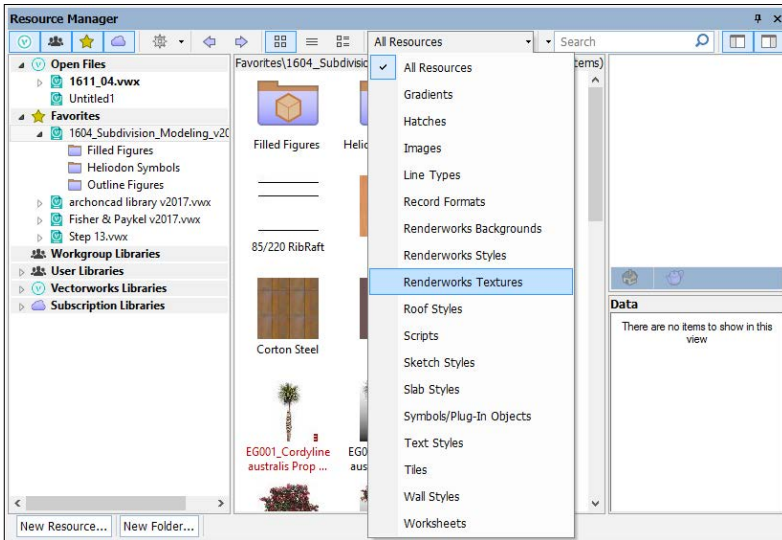
Choosing The Visible Resources

The Resource Manager can display a specific type of resource or it can display all of the resources in a file. This is controlled by pop-up menu.

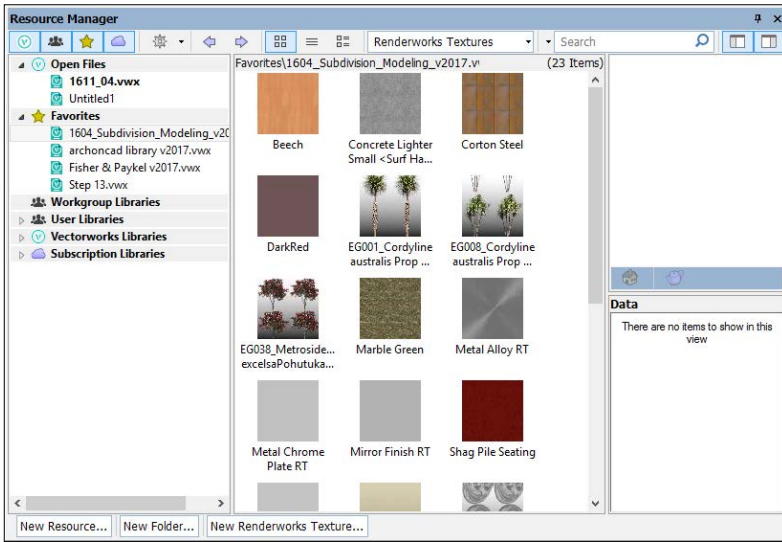
- In this image you can see the **All Resources** is selected. The Resource Manager is showing all the resources that are in this file.



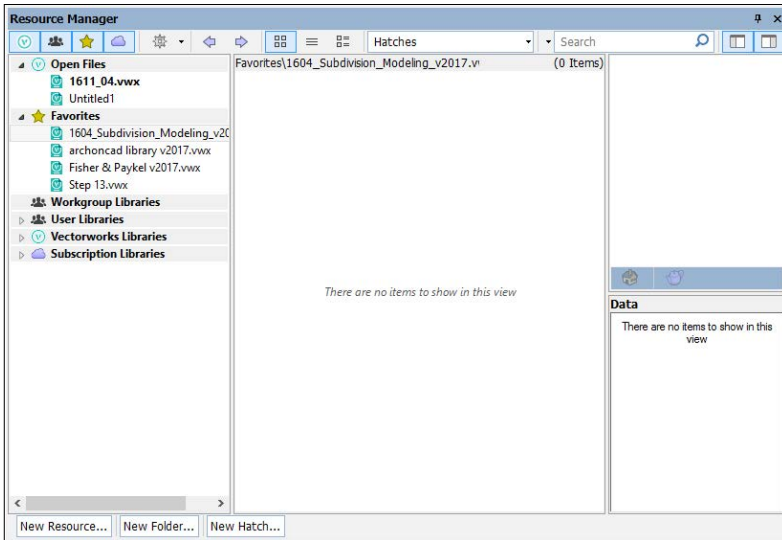
- In this image I am selecting just the Renderworks Textures from the pop-up menu.



- When I click on Renderworks Textures, all the other resources in this file are hidden, and you can only see the Renderworks Textures.



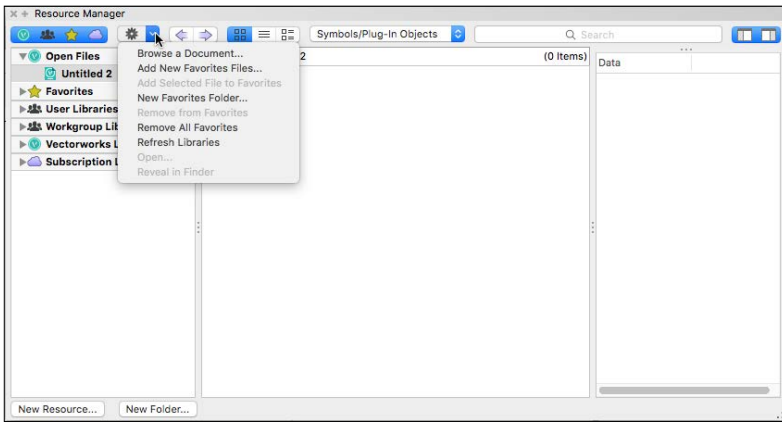
- In this image I have selected Hatches from the pop-up menu. Because this file does not have any hatches and it, the resources pane is empty.



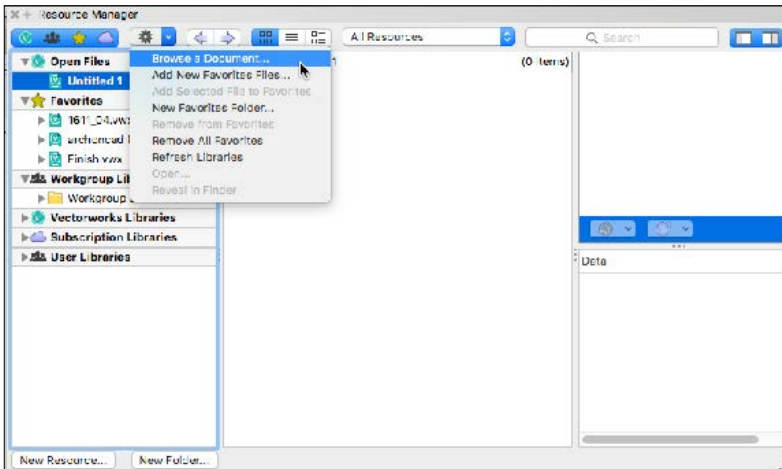
The Action Menu (gear icon)

The action menu is used to deal with things like favorites, browsing documents, refreshing libraries, et cetera. The action menu has not been designed to deal with specific resources, it's really designed to deal with the overall library structure.

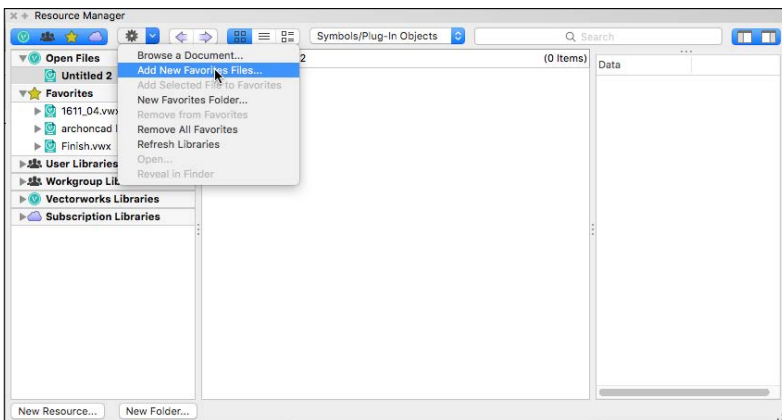
When you click on the action menu you will see a pulldown menu. the menu does not change if you click on a resource rather than a file location, but the grey items will become useful if the right file is selected.



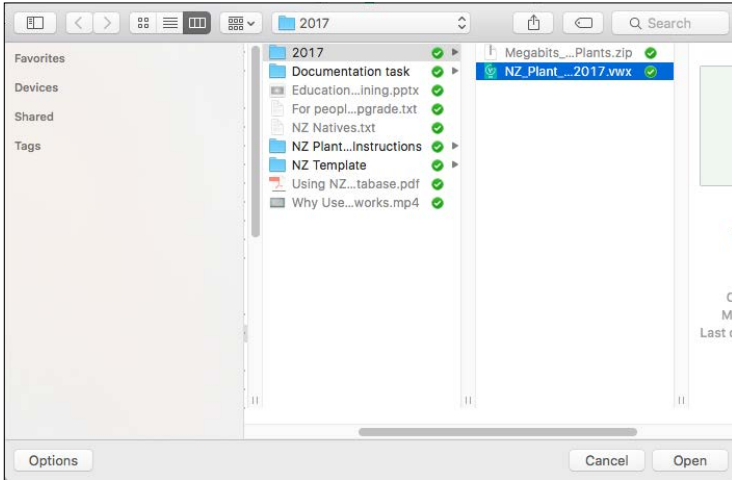
- If you want to look for resources in a file, but you do not want to add that file to your Resource Manager permanently, then you can use the **Browse Document... Command**.



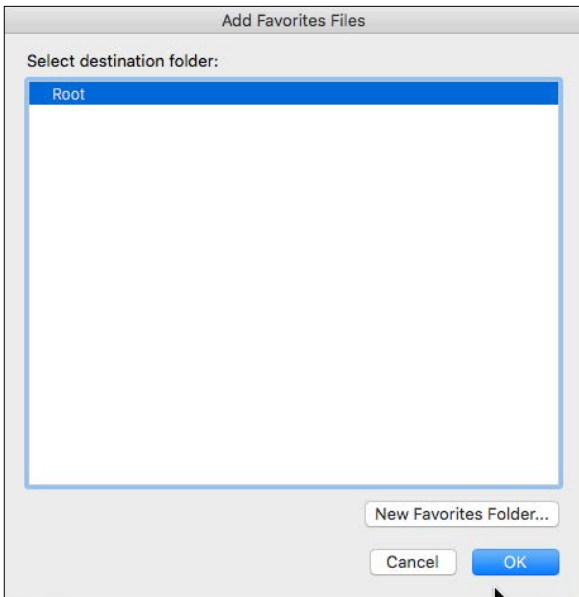
- If you want to add a file permanently to your Resource Manager, then use the Add New Favourites Files... you can add a single or several documents.
- Every time you open Vectorworks these files will be available in your Resource Manager



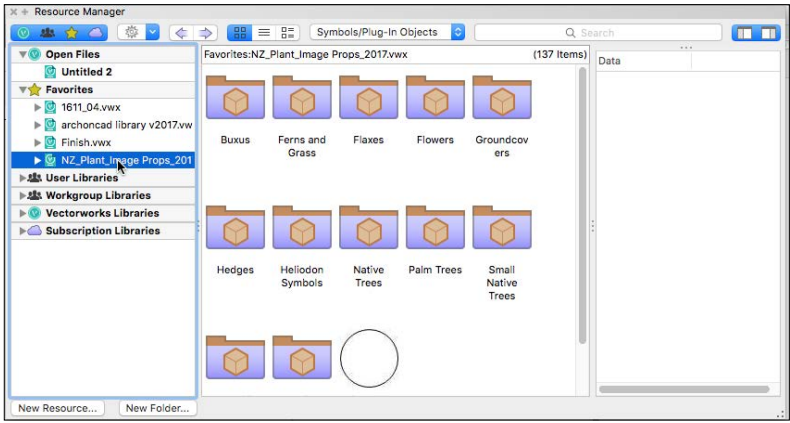
- when you choose this command Vectorworks will open a Finder window or an Explorer window for you to locate the file or files that you want to add.
- Choose the files.
- Click on the okay or **Open** button



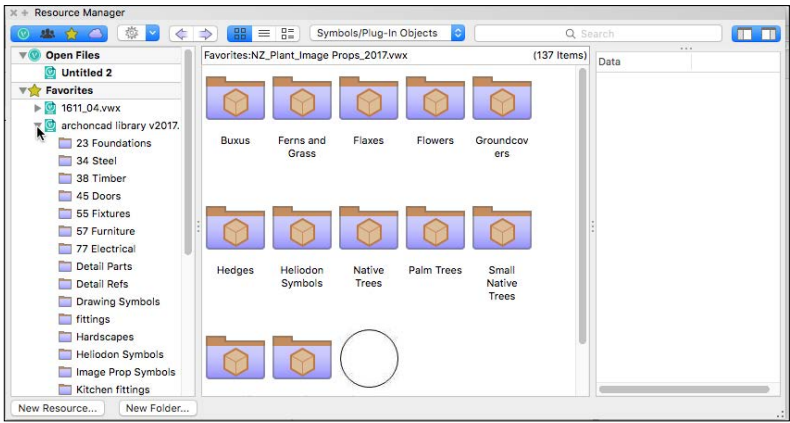
- Choose Root. This dialogue box allows you to make choices when you add your files for creating a tree structure.
- At this stage, click on the OK button.



- The selected file or files will be added to your Resource Manager.

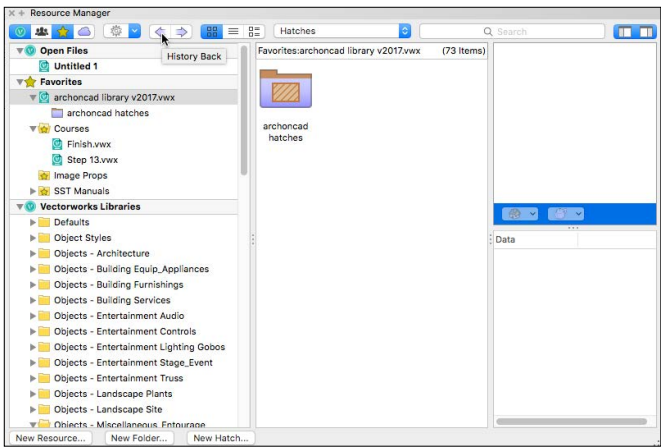


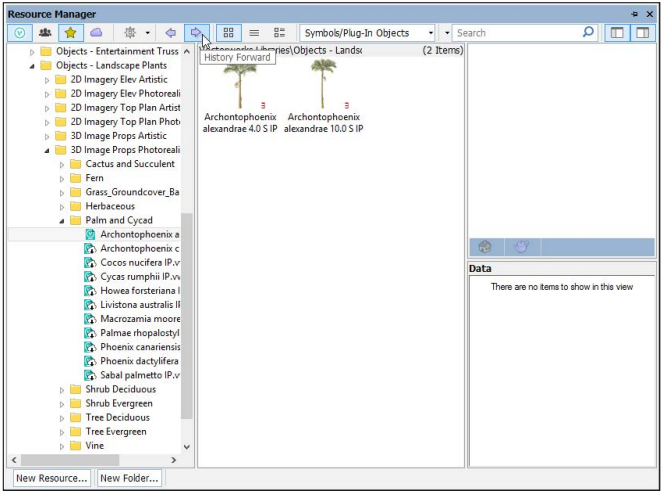
- Sometimes your files will contain folders of information.
- If you click on the arrow to the left of your favourite, you can expose or hide these folders.



History Back, History Forward

These two buttons allow you to go back and forward in your searches (like the back and forward buttons on a web browser).

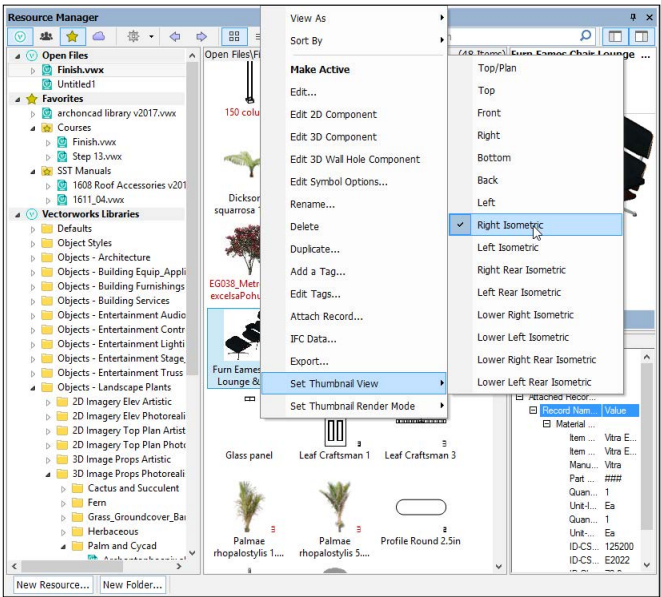




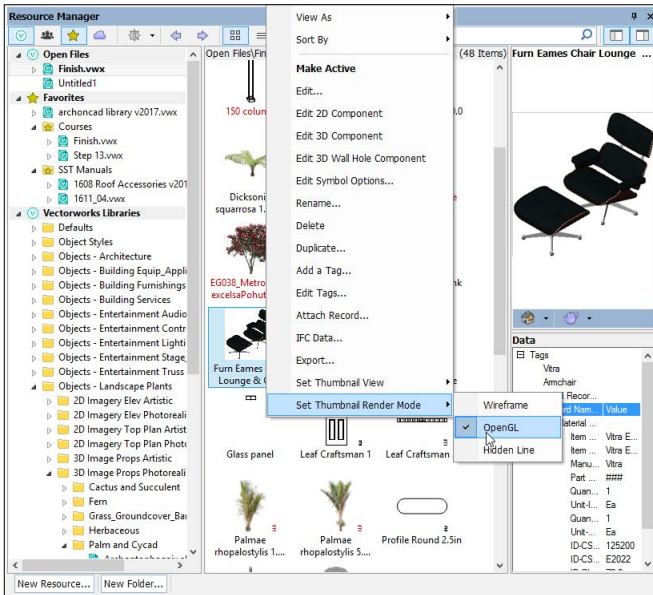
Setting the Thumbnail Views

The resource views is where you choose to see the view of the resources. Some resources look better in plan view, and other resources look better in isometric.

- Right click on the resource.
- Choose **Set Thumbnail View**.



- Choose the type of thumbnail view that you want.
- Right click on the resource again.
- Choose **Set Thumbnail Render Mode**.

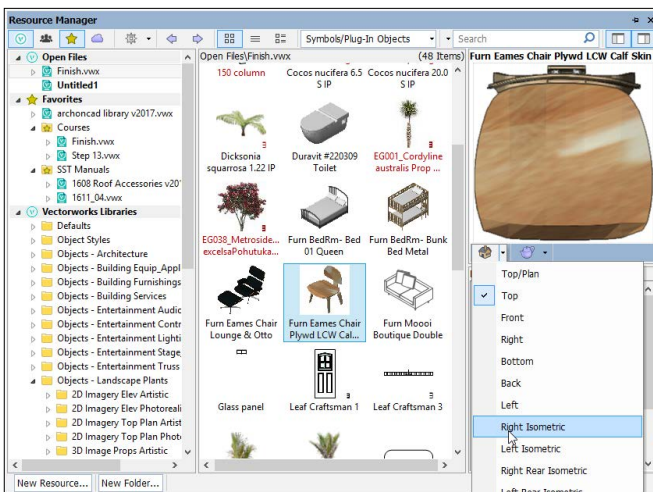


- Choose the type of rendering that you require. You might find that setting your resources to an isometric view with OpenGL rendering makes it easier to choose the resource you want. I typically keep all of my detail symbols in a Top/Plan view.

Setting the Preview View

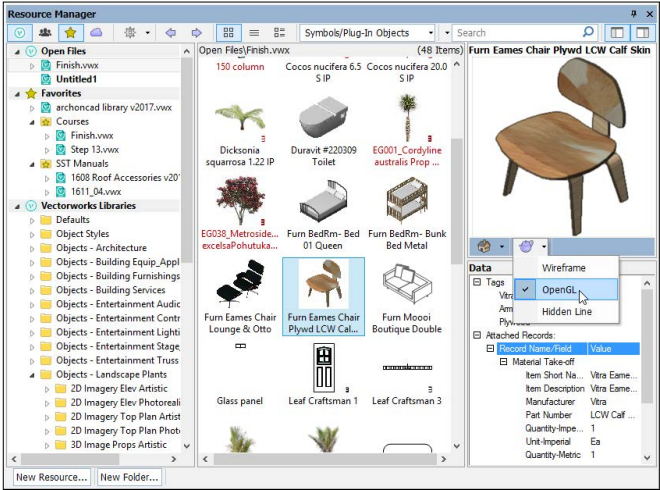
the preview area on the Resource Manager give you the opportunity to see an enlarged view of your resource. If you're looking into your active file, you can also set the preview mode for that resource.

- In the preview area, click on the **View Mode** pop-up menu.
- Choose the view option that you want.



- Click on the **Render Mode** pop-up menu.

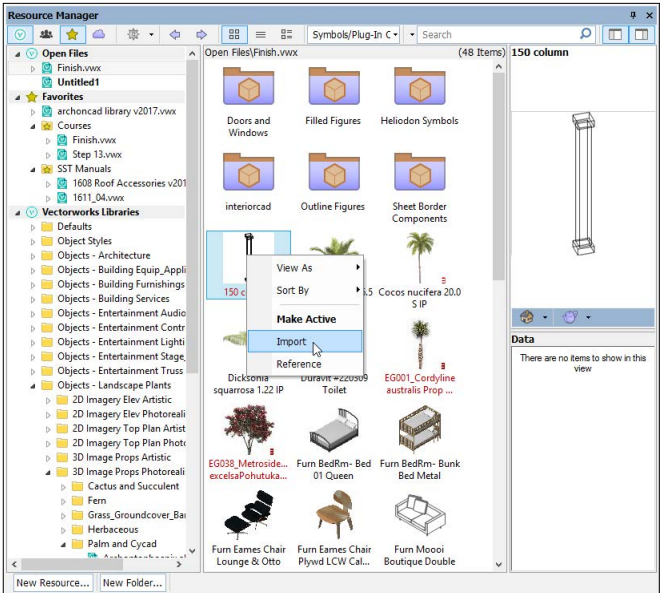
- Choose the render option that you want.



Importing Resources

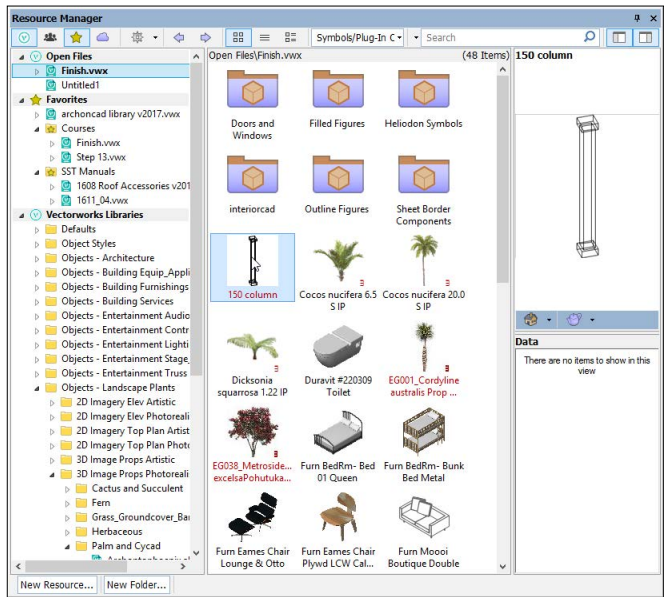
One of the important functions of the Resource Manager is the ability to import resources from other files.

- Use the left side of the Resource Manager to locate the file containing the resources.
- Locate the resource that you want to import into your current file.
- Right click on the resource and choose Import. This will import the resource into your active file.

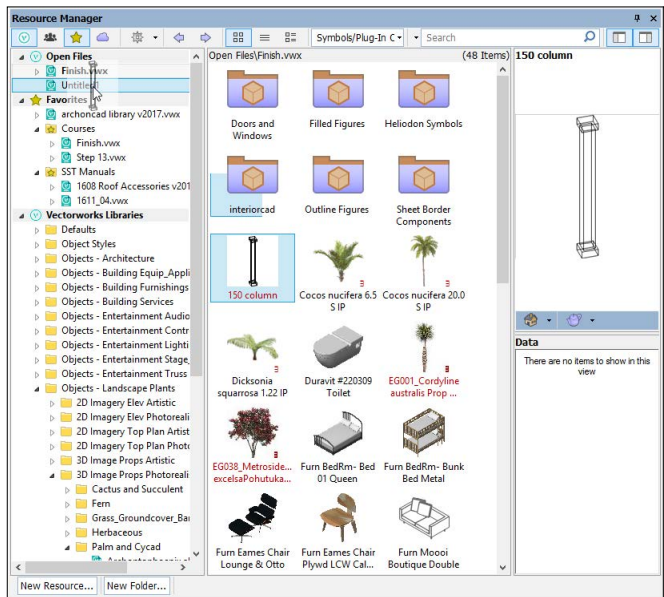


- Another way to import your resources is to drag and drop them.
- Locate the required resource.

- Click on hold your mouse button down on that resource.



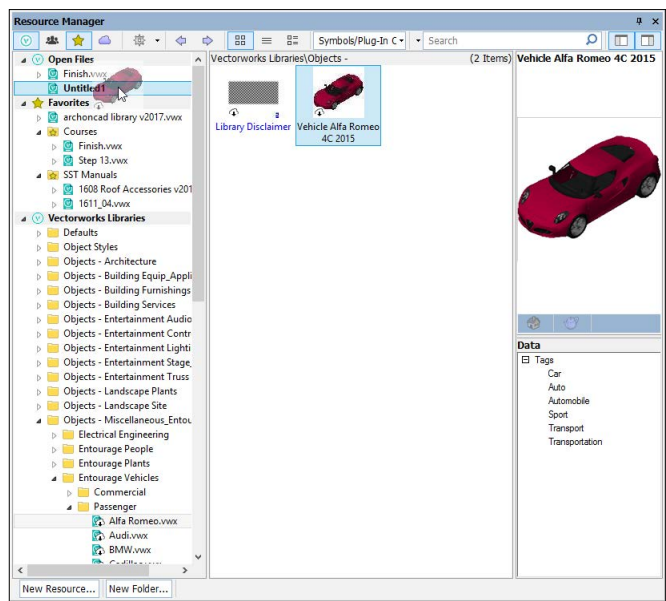
- Drag that resource to the required file.
- When you drag-and-drop resources the destination file does not have to be open on the screen. You can drag-and-drop resources from a current file to your library for example.



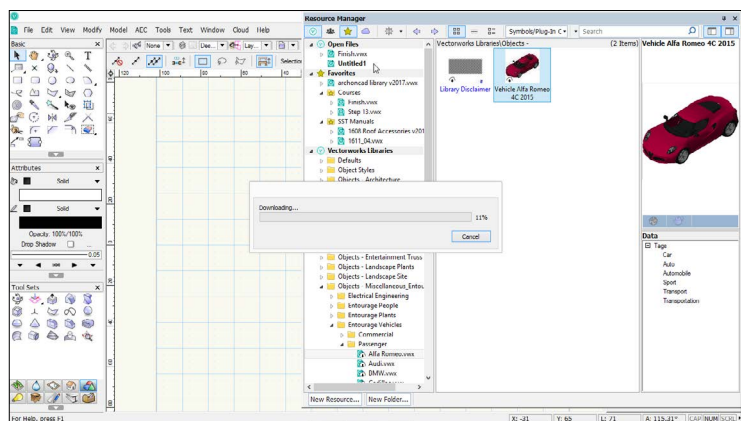
Downloading Resources

Vectorworks comes with a lot of resources which appear in the Resource Manager. However, not all these resources have been downloaded to your computer. Resources that are stored online but not yet downloaded are shown with a download arrow next to the resource name or next to the file

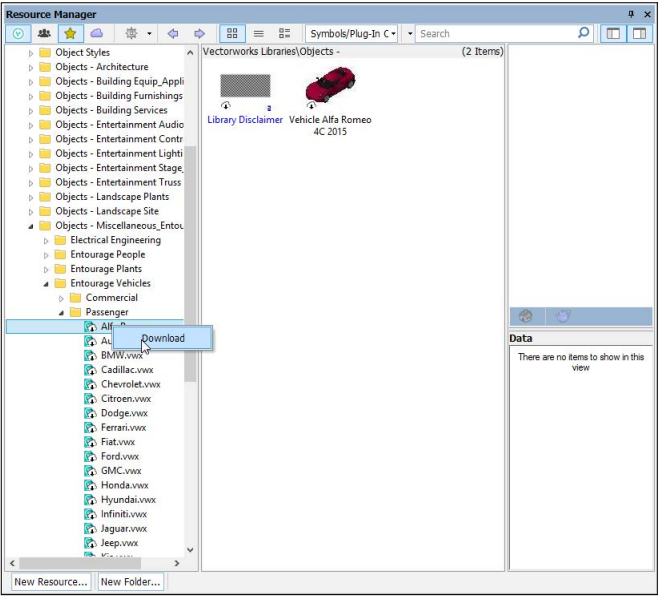
name.



When you select a resource that hasn't been downloaded to your computer, Vectorworks will start downloading that resource.



If you want to download a file that hasn't been downloaded yet, right click on that file and choose download. Vectorworks will then download that file to your computer and store it in the correct location for you.



Intermediate Techniques

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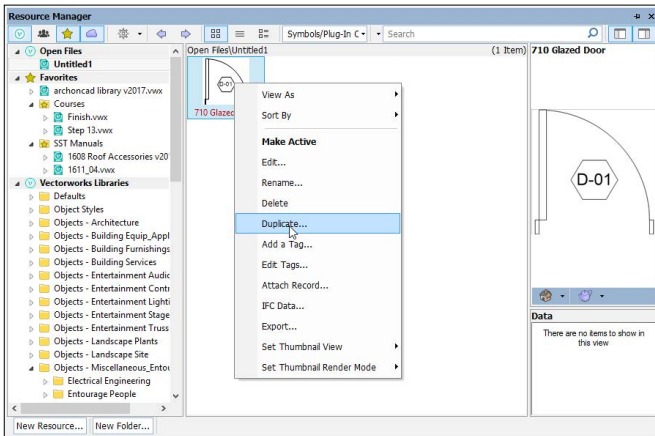
In the previous section we looked at the fundamental techniques with the Resource Manager, what you might call the introduction. This introduction was designed to give you a basic understanding of the Resource Manager.

In this section we want to look at intermediate techniques. You should understand the principles from the last section before you work through this one.

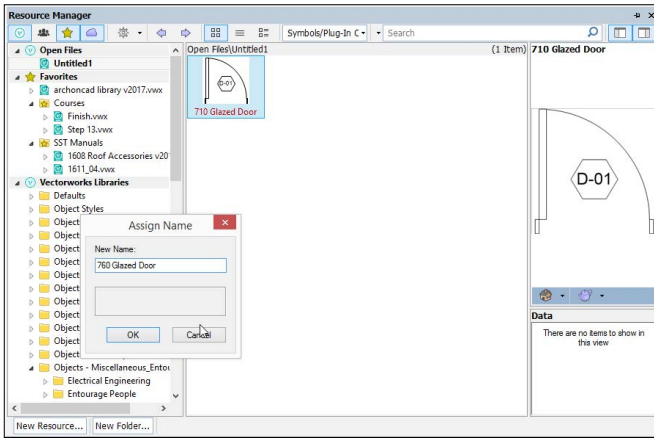
Duplicating Resources

I use this when I need a resource that is similar to one that I already have. It is much quicker to duplicate a resource and edited rather than start a new resource from scratch.

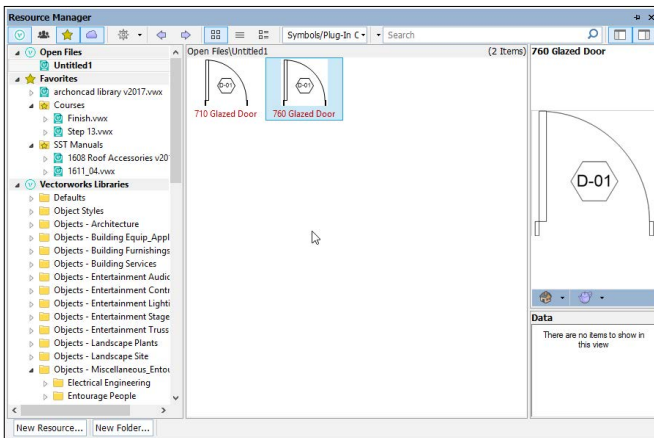
- Find the resource that you wish to duplicate.
- Right click on the resource.
- Choose **Duplicate**.



- Name the resource. The name has to be unique and it can't be the same as the existing class or tool.



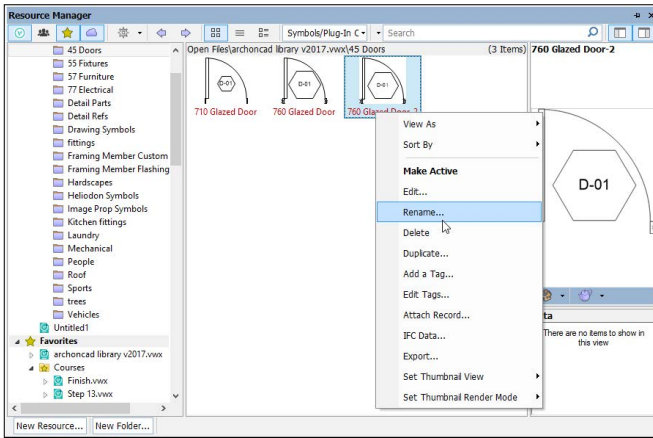
- Click on the **OK** button.
- The new resource will appear.



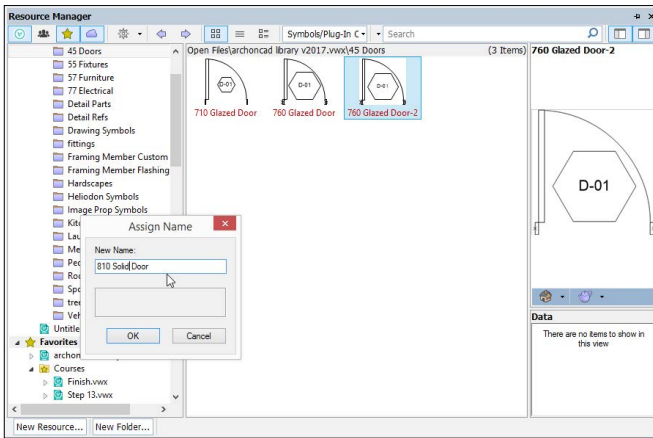
Renaming Resources

Sometimes you need to rename your resources because of a name in conflict or because you want to make sure that your names are accurate and follow your logical naming system.

- Right click on the resource.
- Choose **Rename...**

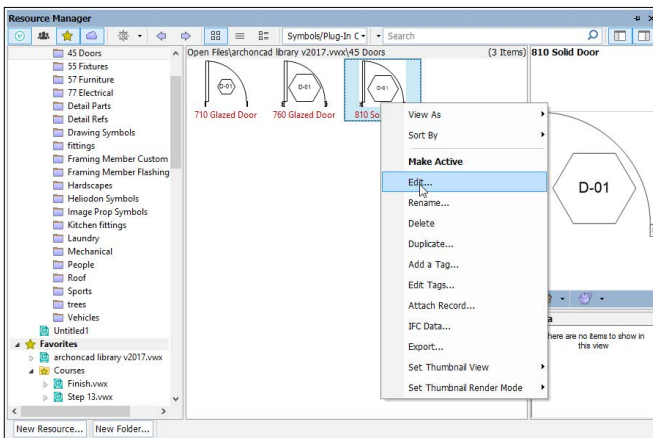


- Give the resource the required name.
- Click on the **OK** button



Edit Resources

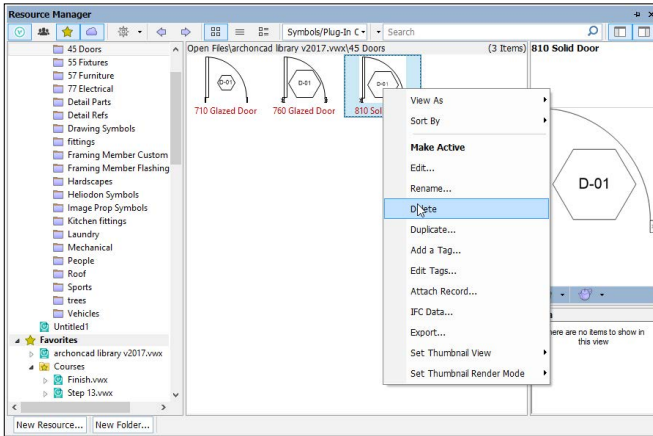
- You will often need to edit the resource after duplicating it.
- Right click on the resource.
- Choose **Edit...**



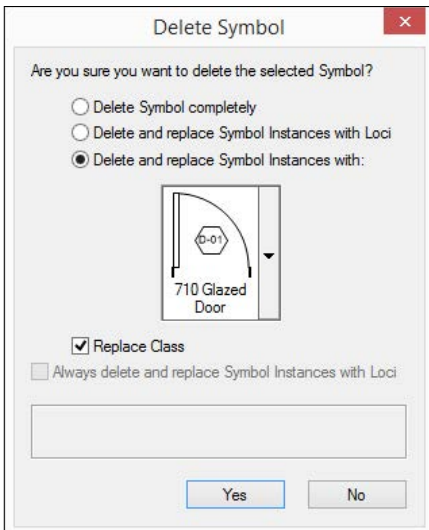
- The dialogue box that appears will depend on the type of resource that you are editing. For example, if it is a wall style, then you will get the edit wall style dialogue box, if it is a door object style, you will get the edit door settings dialogue box.

Deleting Resources

- When you need to delete a resource, Right click on the resource.
- Choose **Delete...**



- If the resource has been used in the document you will get a dialogue box asking you what you would like to do.
- The style of the dialogue box that appears will depend on the resource that you are deleting.

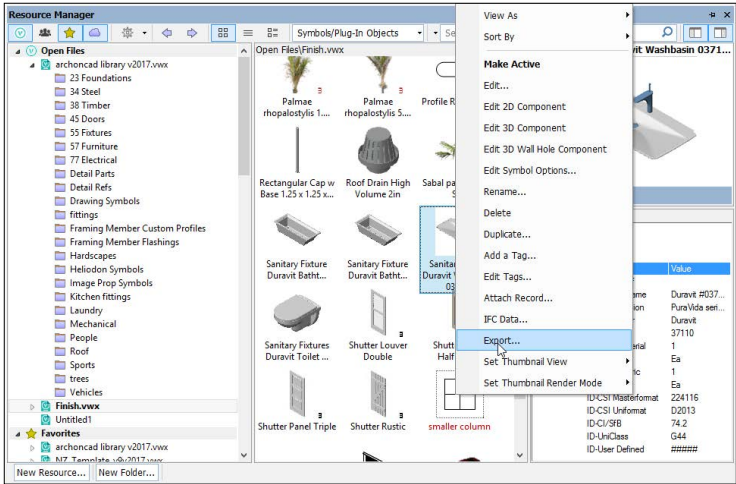


Export Resources

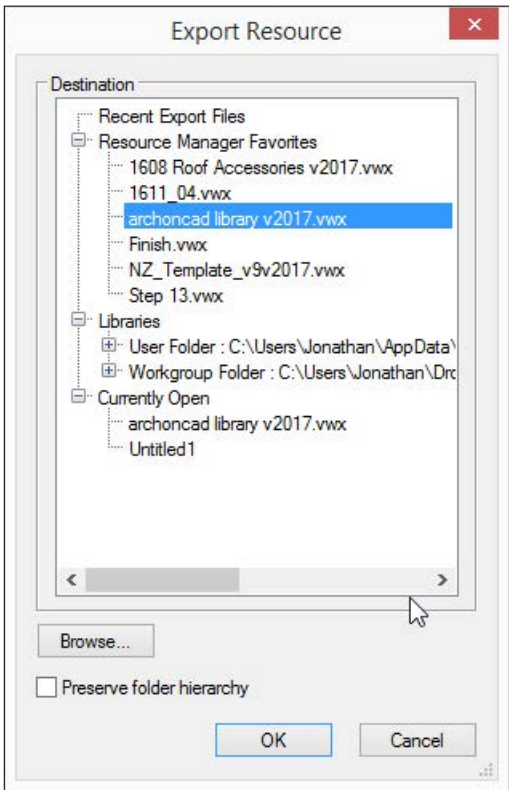
When you create resources in your active file you should export these to your library. Keeping your library up-to-date is a great way of ensuring that

your information is easy to find.

- Right click on the resource.
- Choose **Export...**

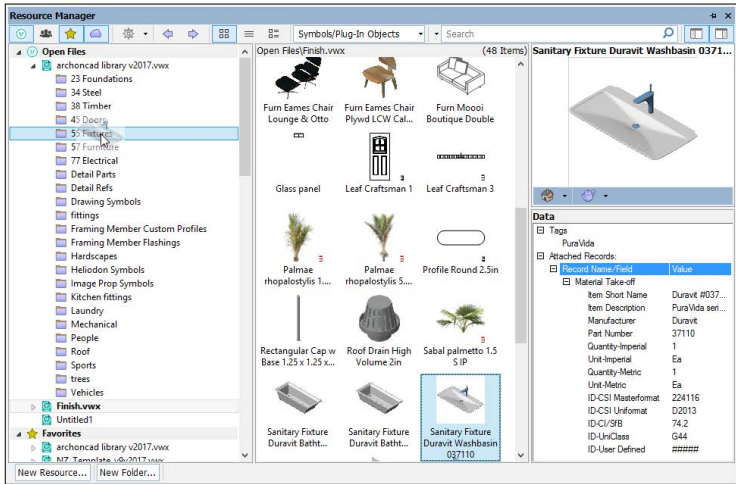


- Choose the location for your export.
- In this case I am using my Resource Manager Favourite. I have my entire library in a single file connected to my Resource Manager. When I need to export a resource, it is easy to choose my library.



- As well as using the export command, you can also drag and drop resources from your current file to your library if it is connected as a

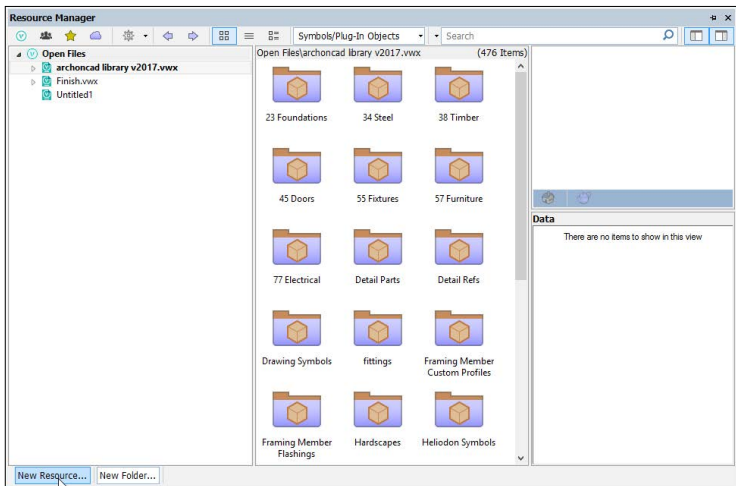
favourite to your Resource Manager or open in the Resource Manager.



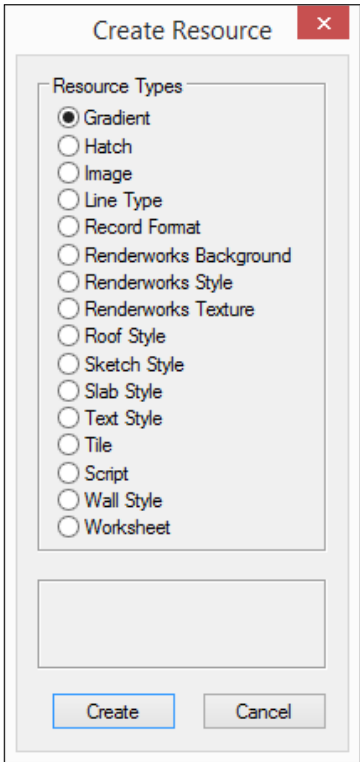
Creating Resources

I mainly create new resources by duplicating existing resources and editing them. But sometimes you need to create a new resource.

The button at the bottom left-hand corner of the Resource Manager allows you to create any resource you want.



- Choose the type of resource that you want to create.

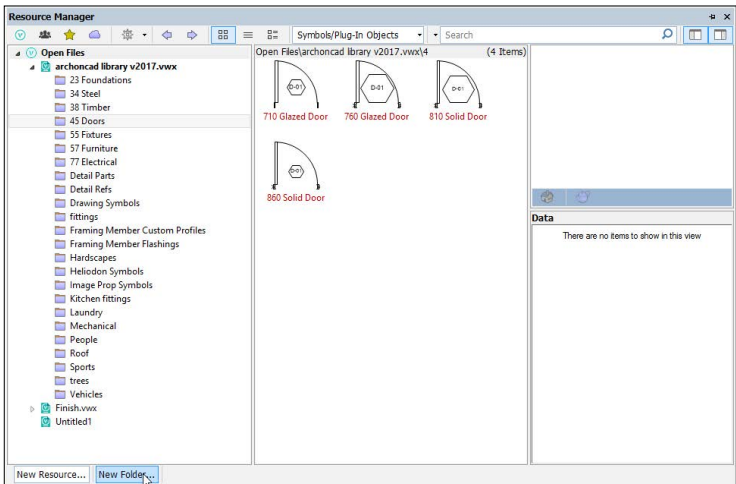


Arranging Resources

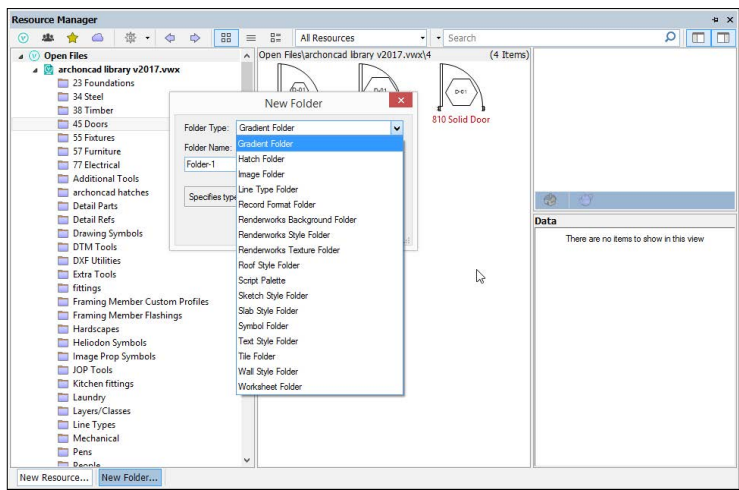
I have found that it's extremely useful to put all of my resources into resource folders. For example, all my door symbols are stored in a symbol folder, all my line types are stored in a line type folder, or my wall styles are stored in a wall style folder, et cetera.

This makes it useful to find the types of resources you want, and it also makes it easy to look through your library when it's neatly arranged.

- At the bottom right-hand corner of the Resource Manager is a button for creating new folders.



- Choose the type of folder that you want to create.
- Name the folder.
- Click on the OK button to return back to the Resource Manager.



You can only store one type of resource in each folder. For example if you create a line style folder, you cannot store wall styles in it.

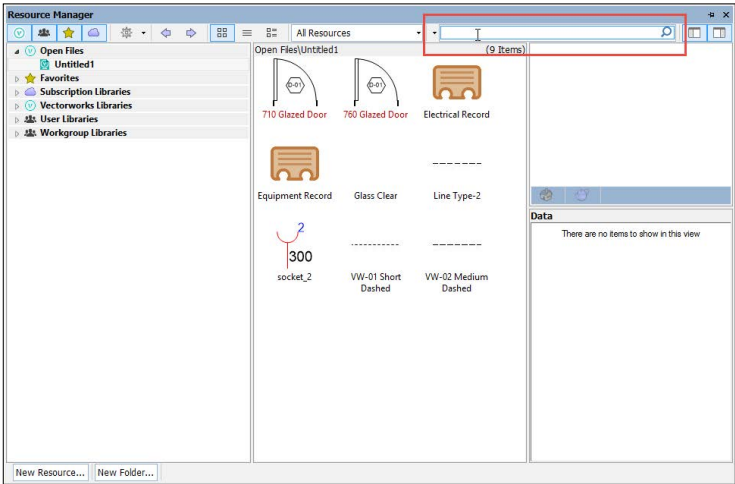
Advanced Techniques

In this part of the manual we are going to cover advanced topics. If you are struggling with the resource manager, I advise you to go back to the beginning of this manual and cover the basic techniques. You will need to understand the basic techniques before you can use these advanced ones.

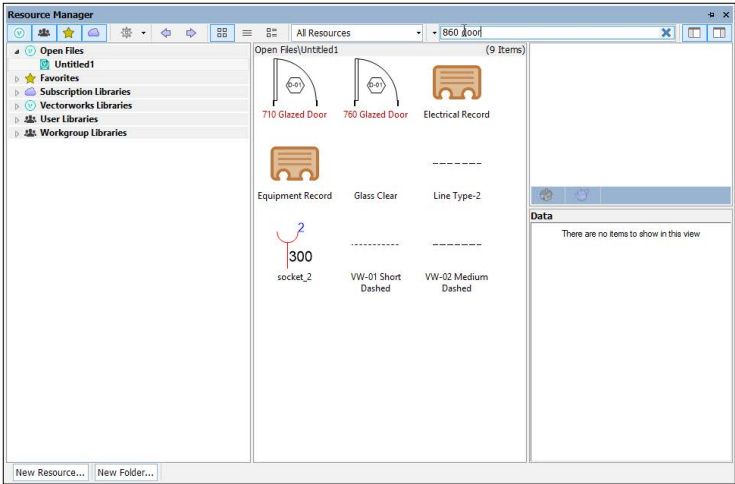
Searching

One of the major changes with the new Resource Manager is the concept of the Library Catalogue. The idea of the library catalogue is that Vectorworks will look through all of your files that are connected to your Resource Manager and create a catalogue of their contents. When you search for files in Vectorworks, instead of looking through each file individually during the search, it looks through the catalogue. This makes it much faster to search for resources.

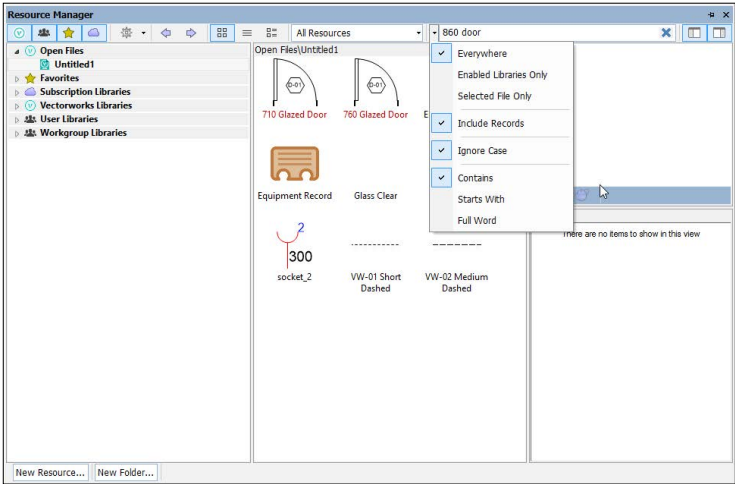
- The search area is at the top of the Resource Manager.



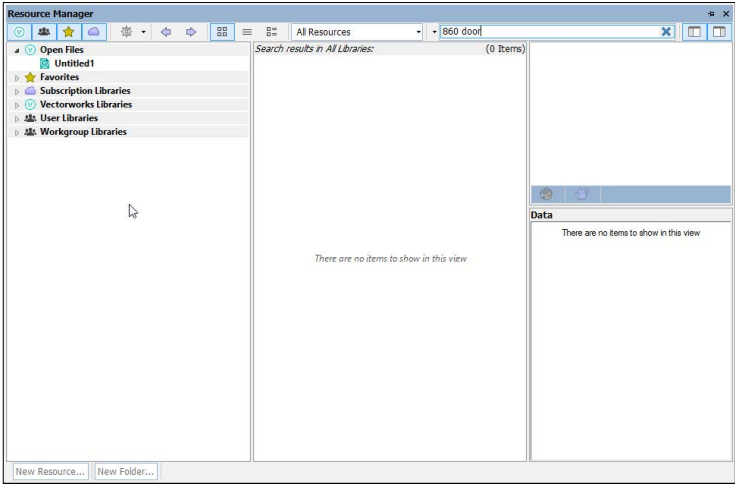
- Type the name of our resource that you require.



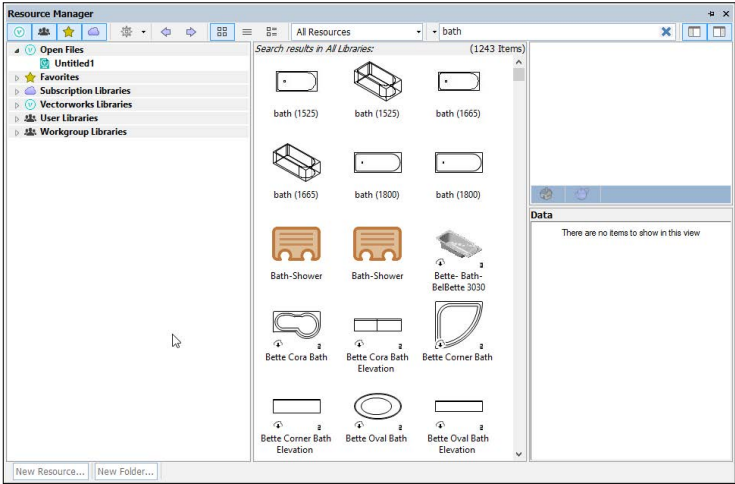
- To the left of the search area is a pulldown menu that allows you to choose where to search.
- You can search everywhere (all the files and libraries connected to your Resource Manager).
- You can limit the search to Enabled Libraries Only. This will allow you to filter your results by using the enabled libraries buttons on the top left-hand corner of the resource manager. For example, if you turn off user and workgroup libraries, the search will not look in there.
- You can limit the search to just the selected file.



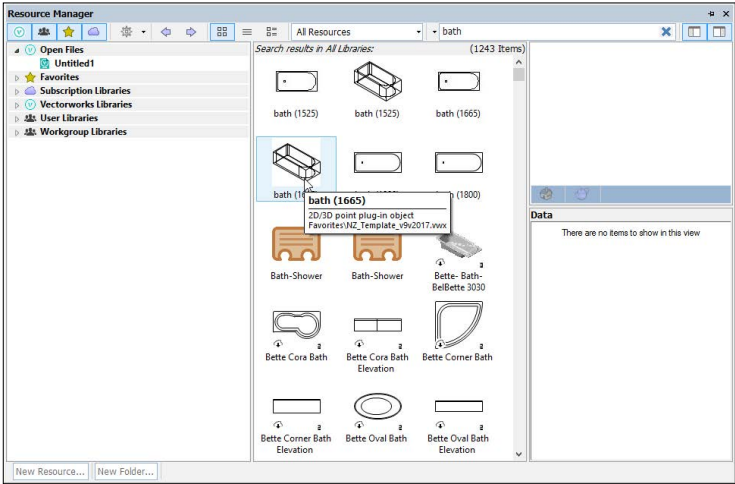
- To carry out the search, hit the enter or return key. The results will be displayed in the resource manager.
- In this example, I have no resources that match the phrase “860 door.”



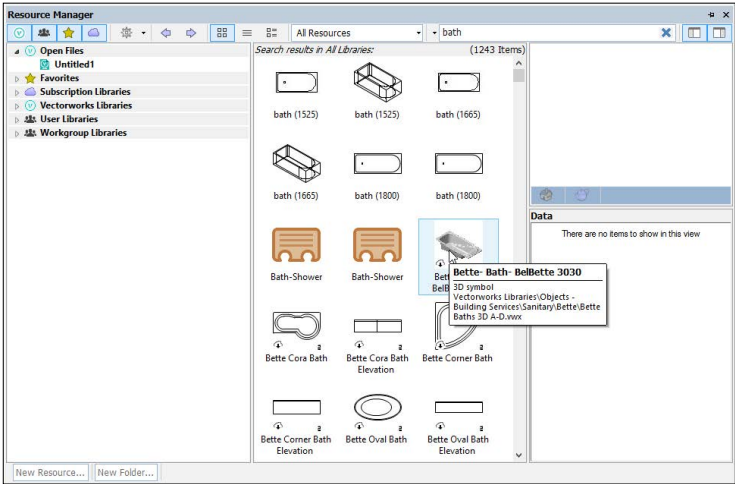
- In this example I have located several resources that include the word “bath.”



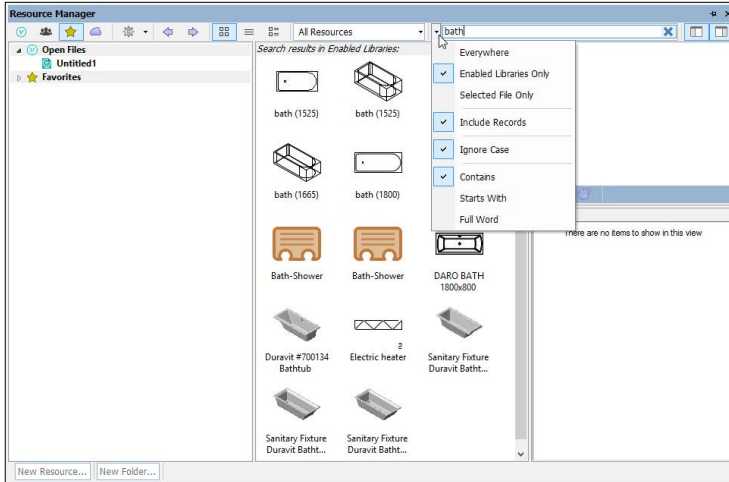
- You can look through the found results and if you pause on a resource, Vectorworks will tell you whether resources stored. In this example it is stored in my template.



- In this example the resources stored in the Vectorworks libraries. The icon for this resource shows a small download arrow, meaning that this resource has not yet been downloaded to my computer.



- In this example I have disabled all of the libraries except my favourites. The search has returned fewer items and these items are either in the open file or in my favourites.



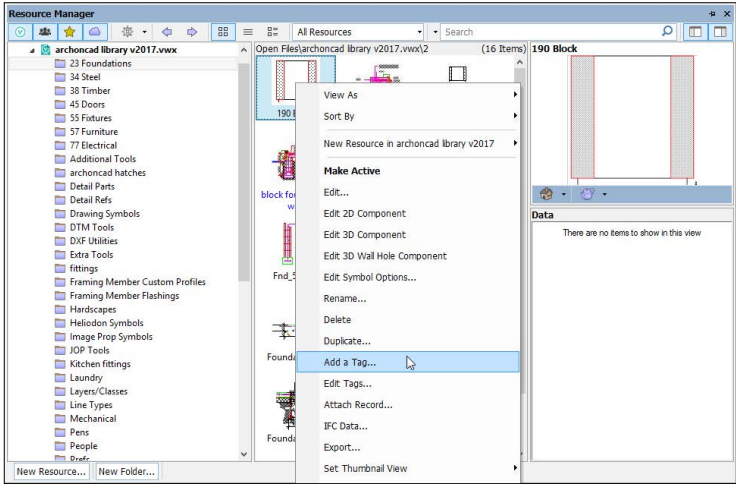
when you search for resources Vectorworks will search the name of the resource, any records that are in that resource, and it will also search for tags that have been added to that resource.

Using Tags

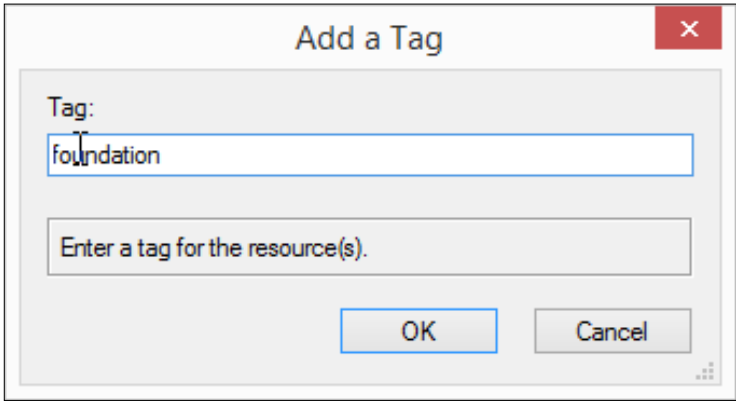
Tagging is a great way of improving your search results. tags allow you to add an extra word or phrase to your resources. You can then search for this tag and it will find all of the resources that have that tag.

For example, you could add a tags to a concrete block symbol that would allow you to find that symbol when you're looking for foundations, concrete block, retaining wall, or footings. When you search for any of these terms, the symbol would appear because of the tags.

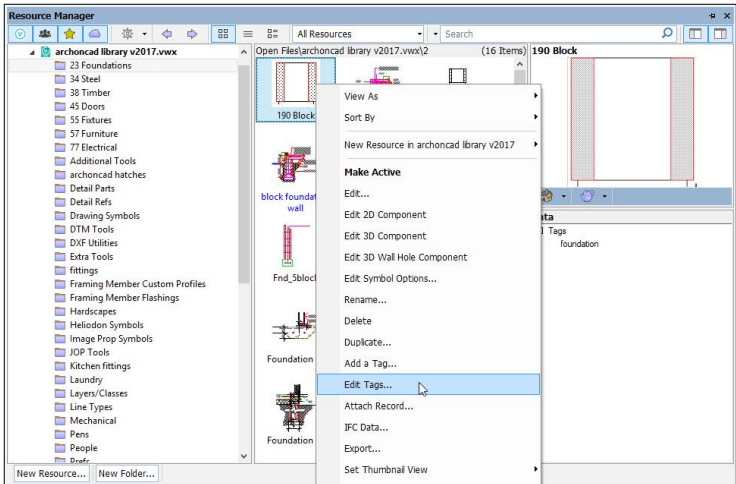
- To add a tag to resource, right click on the resource.
- Choose **Add a Tag...** there are two options for adding tags, adding a tag will add a single tag, while **Edit Tags...** will allow you to add several tags to your resources.



- Type and the tag that you would like to add.
- Click on the **OK** button to close the dialogue box and return to the Resource Manager.

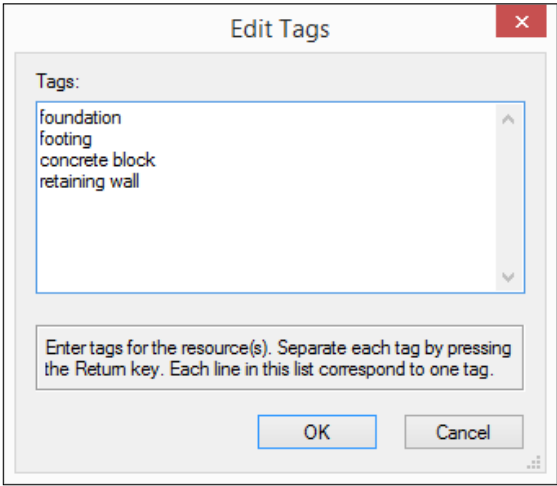


- if you want to add several tags to your objects, the easiest way to do this is to use the option **Edit Tags...**

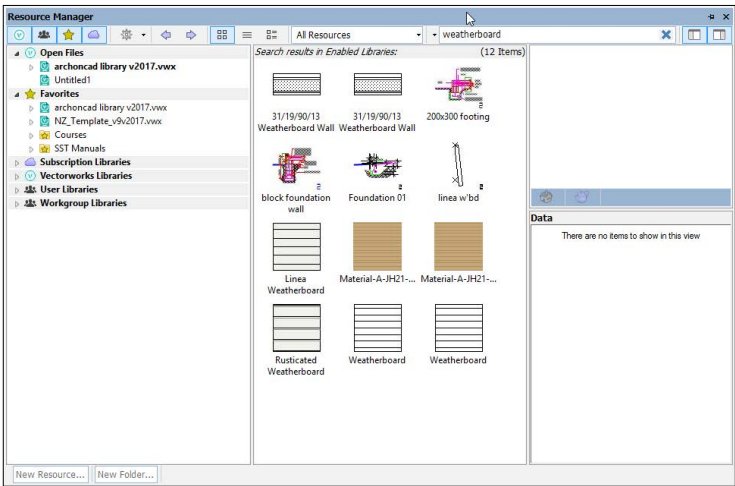


- This option allows you to add several tags and is a quick way to add multiple tags to your resources.

- Type in the first tag, then had the return key to create a new line before typing in the next tag.
- You can add several tags and then click on the OK button to close this dialogue box and return to the Resource Manager.



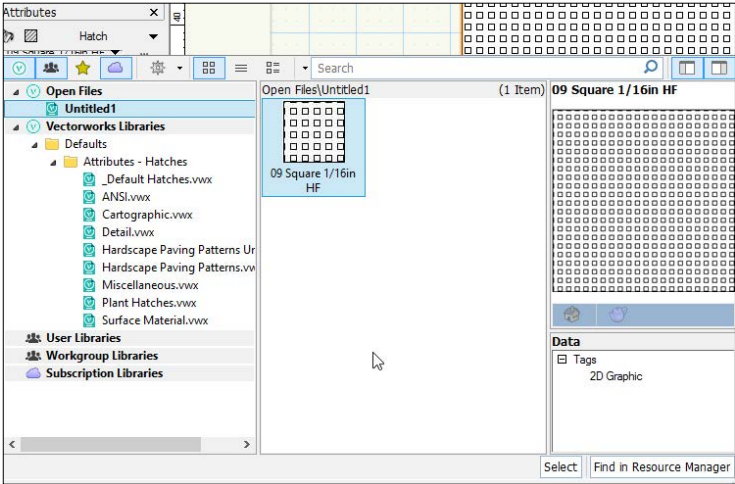
- Now when you search, you can use your tag to search for and it will find all the resources that have been tagged with that name.
- In this example I have searched for “weatherboard” in Vectorworks has located several resources that use that word in their name or in their tag. Notice that I have located wall styles, hatches, symbols, and even details.



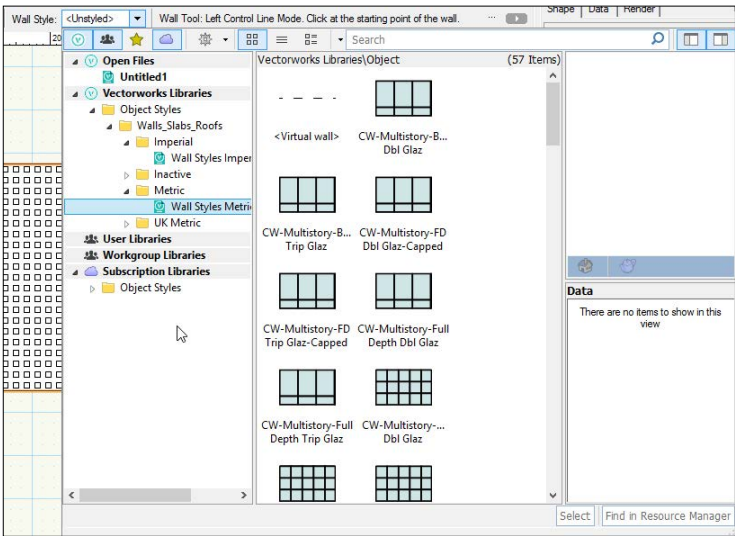
- If you create tags on your resources that relate to construction techniques, then you could search for those tags when you are creating a project that would use that construction type

Default Content

default content is the content that Vectorworks shows you by default. This usually shows up when you want to apply hatching, gradients, image fills, et cetera.



Default content also shows up when you want to create walls, slabs, doors, etc.



- Adding your favourite objects to your default content will your productivity.

User and Workgroup Folders

User and Workgroup folders are used to store your customised default content. The User folder is created for you automatically, while a workgroup folder has to be created specifically. the structure of the user and workgroup folder is is very important, this is what Vectorworks uses to locate the Default Content.

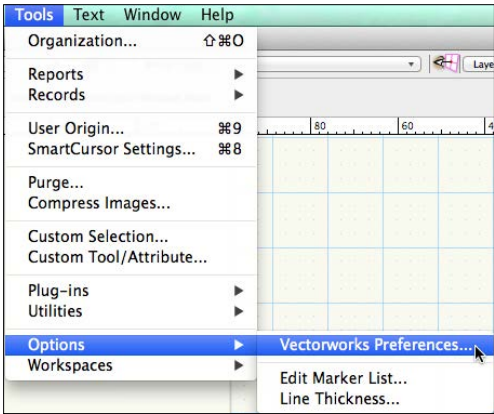
User Folder

A user folder is stored away from the Vectorworks application folder, so it can be challenging to find it and maintain it, but Vectorworks will help you to find it. The user folder has the same library structure as the Application folder, but it is not removed if you uninstall Vectorworks and it is not replaced if you re-install Vectorworks.

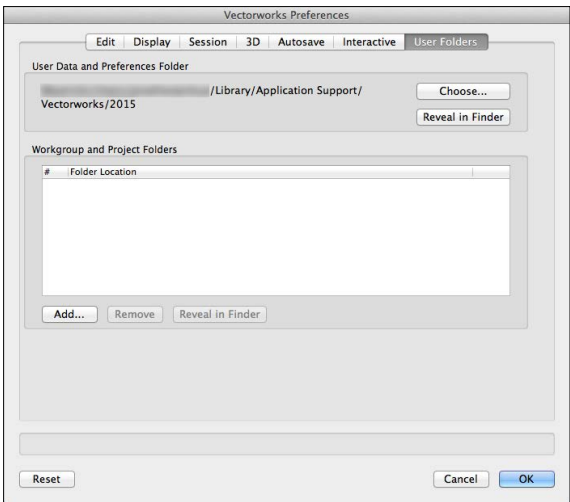
Setting up a user folder is a nice way to work, if you are a sole practitioner. Vectorworks creates a user folder on your computer to store all your custom settings away from the Vectorworks application folder. The default location depends on whether you are using a Macintosh or Windows.

So, here is my recommendation for sole practitioners: set up a user folder in the same location as your current projects. That way, when you back up your current projects, you back up your user folder.

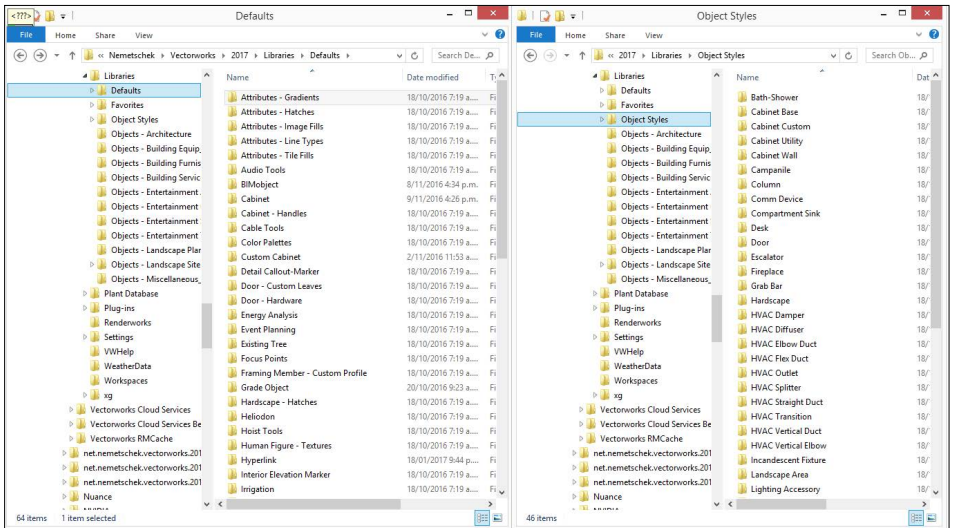
- Go to the **Menu** bar.
- Choose **Tools > Options > Vectorworks Preferences...**



- Click on **User Folders**.



- This dialogue box shows you the location of your User Folder. You can click on the button to explore it. Vectorworks will show the structure of the folder.
- The user folder has a structure so that each tool or command has its own folder for information. That's how Vectorworks finds the default content when it needs it.
- There are two very important folders to look out for: Default and Object Styles.



Default content is where Vectorworks looks for things like hatches, gradients, line types, et cetera.

Object Styles is where Vectorworks looks for information with things like walls, doors, et cetera.

Each folder has a very specific structure and the right information needs to be stored in each folder.

Workgroup Folder

A workgroup folder is very similar to a user folder, except that it is designed for sharing with others. If you are using multiple computers or in a multi-user office, use a workgroup folder for storing all the shared default content.

A workgroup folder needs to have exactly the same structure as your user folder. The easiest way to create a workgroup folder is to take a copy of your user folder and place it in a different location. Since the workgroup folder is normally used in a shared situation, a good place to locate your workgroup folder is on the server.

When you are working on very large projects that have specific notes, hatches, wall styles, etc. you could have a workgroup folder for the project.

This would be a workgroup folder which is separate from other projects.

It would make it easy to change between large commercial projects and small domestic projects if you had a specific workgroup folder for these project types. When you and choose your wall styles, for example, the large commercial project might use specific wall styles that you do not want to see when you are working on a small domestic project. When you working on that large commercial project you may not want to see the wall styles that are appropriate for a small domestic project.

Refresh Libraries

When you have updated your library file, you can refresh the libraries.I commented earlier on about Vectorworks using the search through the library catalogue. Every once in a while this library catalogue needs to be updated, that's what the Refresh Libraries command is for.

When Vectorworks updates the library files online or when you have updated your library files on your computer (or network), you will get a dialogue box about refreshing the libraries when you start Vectorworks.

I think it's a good idea to refresh the libraries so that you can find the most up-to-date information. You can cancel the dialogue box if you wish, but that does mean that Vectorworks will not be accessing its latest library catalogue.

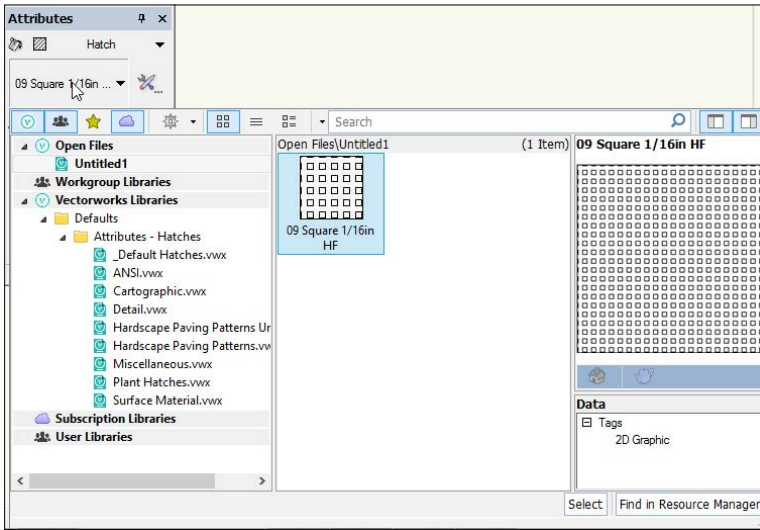
Single Library File

In previous versions of Vectorworks the only way to get your default content to appear was to store it in the correct location (User or Workgroup folder).

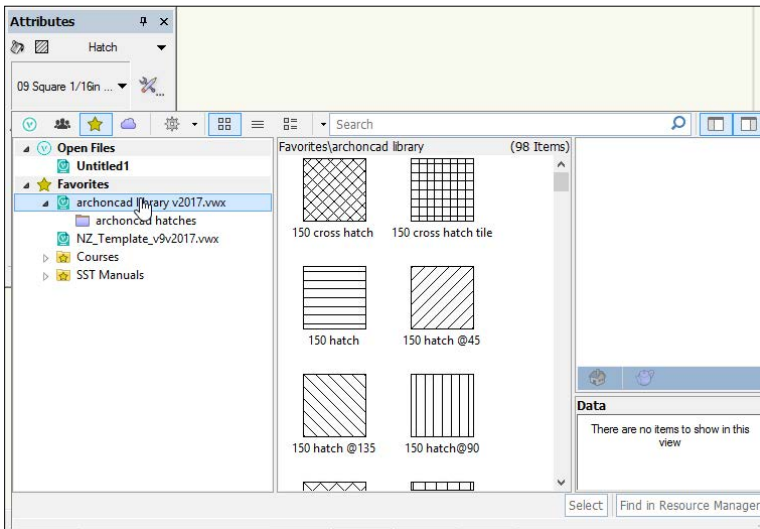
The Resource Manager allows you to add favourite files (as did the Resource Browser) and these favourite files will show up when you're looking for default content (unlike the Resource Browser).

In the past I've always recommended against using a single library file because it was impossible to get all your content to show up at the right time. It is now possible to have a single library file with all of your default content, symbols, et cetera and have that appear when you need it.

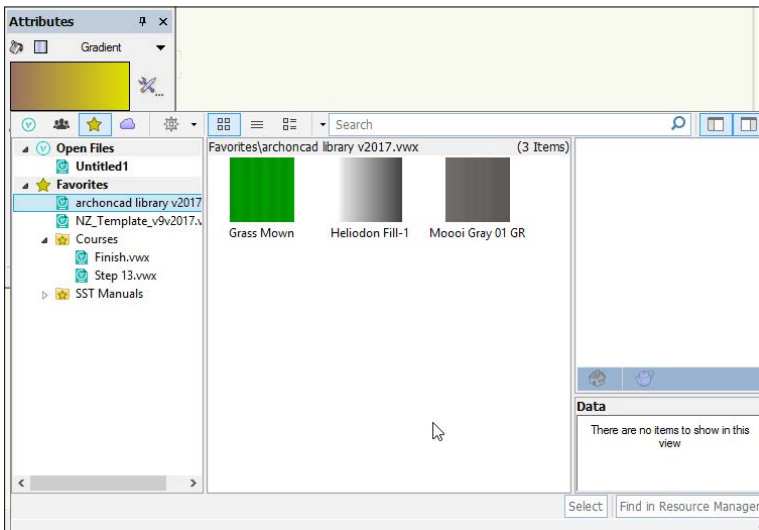
I will show you some examples. In this example I want to apply hatch. when I click on the Attributes Palette, Vectorworks shows me the default content.



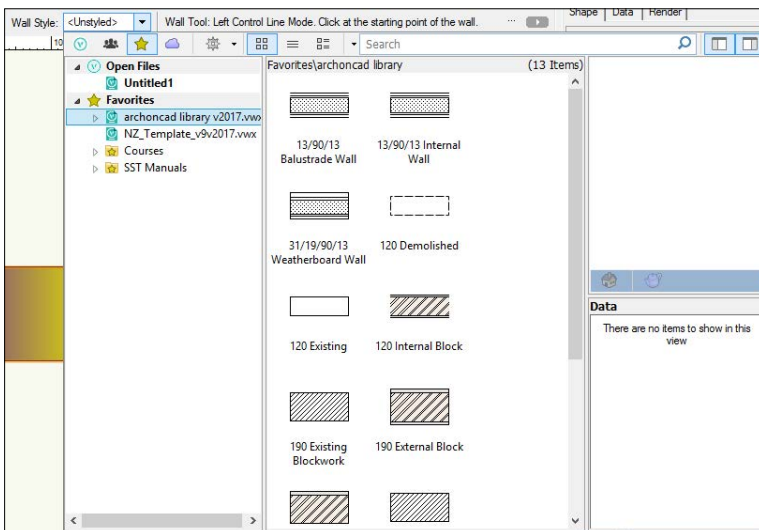
- You can use the options on the Resource Manager to hide Vectorworks libraries, User Libraries, and Subscription Libraries.
- Now all you can see your favourites. These favourites could contain all of your default content.



- The same thing applies if you are looking for a gradient or other default content on the attributes palette.



- In this example I want to look at walls and slabs.
- You can filter the resources that Vectorworks shows you when you're looking for object styles in the same way that you can with the Attributes Palette.



This means that you can use a single library file that contains almost all of your default resources and by filtering the resource manager to only show your favourites, you can easily find them.

At the moment there are one or two tools that do not use the full resource manager (framing member). You can store your resources in your single library file, but you will have to import them into your current project in order to use them with those tools.

Thank you

We trust that you have enjoyed working through this manual and that it has been informative and constructive.

For more information, please visit: <http://learn.archoncad.com/>. If you just want someone to help you learn Vectorworks, to carry out some Vectorworks contract work, or you want someone to make Vectorworks easier, contact us, as this is a service that we also offer:

jon@archoncad.com

Thank you again,
Jonathan Pickup
January 2017