

## How to create a stamp template

1. Suppose we want to create a stamp sized 2 in. x 2 in.
2. First, open a file of the sheet size you need.
3. For this demonstration the sheet size is: 24 x 36 (FP-1.dwg)
4. In the menu at the top center of the window, select the **Takeoff** menu. If you do not see the Takeoff menu select the dropdown next to measure and select Takeoff
5. From the Takeoff dropdown, select **Settings**

Measurement Settings Dialog Box will open

Select

Measuring System: English Architectural

Unit: Inches

Precision: 0.01

Precision (Distance): 1/16

Set Scale Custom: 1 in = 1 in

Click **OK**.

6. In the task pane, ensure the **Takeoff** tab is selected.
7. From the menu in the task pane, click **New**.  
The Takeoff Category Dialog Box will appear  
Name the category "Stamp."  
Select an easily visible color.  
Measurement type: Length  
Unit System: English Architectural  
Unit: in  
Precision: 1/16  
Click **OK**
8. Using the Zoom Window Tool, zoom into the area where you will position the stamp: in this case, near the bottom right hand corner.
9. From the takeoff tools on the left side of the Viewer screen, select the line tool.
10. Optional: Turn off Snap located in the Properties Bar

11. Move the cursor near the bottom right hand corner but don't click yet
12. Hold down the shift key.
13. Now, click and release the left mouse button in the bottom right hand corner of the drawing.
14. Move the mouse up 2 inches. You can view the distance in the far left field in the Properties bar.
15. When you get to 2 inches, left click again and release the shift key. You now have a guide for the stamp.
16. Click the Annotate menu.
17. From the markup tools on the left side of the window, select the Rectangle tool.
18. In the Properties bar, select the desired color, fill style (hollow), line width and style for the stamp border line.
19. To constrain the rectangle to be a square hold down the shift key before you click
20. Left click in the bottom right hand corner of the drawing – at the bottom endpoint of the guideline line you made.
21. Drag up, and slightly to the left, until the top of the square you are drawing reaches the top endpoint of the guideline and release the mouse button and shift key
22. You now have a 2-inch square for the stamp border.
23. You need to copy the square to the clipboard. Right-click on the outline of the square. From the resulting menu, select Copy. (You can also copy using the keyboard shortcut: control-C).
24. In the upper left-hand corner of the Viewer window, click on the Markup icon. Select the Stamp Templates submenu, then New. You will be prompted whether to save the changes to the markup. Click No.
25. The image will shift slightly in the screen as an indicator that you are now editing a stamp.
26. Right-click and select **Paste** (or use keyboard shortcut control-V). The cursor is now loaded with the square. Move the cursor to the location where you wish to place the stamp and left-click.
27. Optional: Save this as a stamp template. To save, click on the Markup icon in the upper left-hand corner of the Viewer window, select the Stamp Templates submenu. Select

**Save** and name the template. You can then open the template to use as basis for the complete stamps without having to re-measure and set up the border each time.

The following elements can be added to your stamp template as desired:

### **Graphic images**

1. Graphic images (image stamps) are stored on your local hard drive, or designated location on a network share, *not* in ProjectDox.
2. From the Markup tools on the left select the Image stamp tool.
3. Select the desired image either from the Properties bar dropdown or by clicking browse and navigating to the image.
4. Left-click and drag to position and size the image.

### **Shapes**

Insert shapes from the annotation tools: rectangles, lines, etc., as you would in a normal markup, as desired.

### **Static Text**

Select the text tool and then choose your font, style, and color. Each text box can only have one set of properties. Left click and drag to create the text box. Insert text as you would in a normal markup, as desired. Use the gold diamond to adjust as needed.

### **Dynamic text elements**

1. Create a text box with desired properties making sure the text box is sized to hold the resulting dynamic text
2. For our example we will be adding three tokens- Date, Reviewed by, and Project
3. In your text box, type Date (return) Reviewed By (return) and Project
4. You can resize by dragging the gold diamond
5. While still within the text box, select VAR TEXT from the Properties Bar
6. The Replace with Variable Text Dialog Box will appear. You will see your entries in the bottom section of the dialog box.

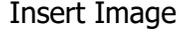
In the top section you will type in your labels and tokens. For this example we will start with the date by typing Date:space%. Select "Date" from the popup, hit return, Repeat this for the remaining tokens. If your selection is not available in the popup you can manually enter the token name by typing it and then % and selecting % from the popup. Then type the token name.

Click OK

We want the stamp elements to be easily visible against the white background of our stamped file so we will change the color to blue. Using the control key, we will select each of the stamp elements except for the graphic image and from the Properties tool bar pick our new color.

This is another place to save your template by using the same Save As method as before.

PAUSE

We batch stamped and this is the result. 

Next, we will show you how to create an offset to help you position the stamp.

Offsets are marks used to position batch stamps. By creating an offset, the system sees the offset as part of the stamp and then positions the stamp accordingly.

1. Delete your file from the approved folder and navigate back to the drawings folder.
2. Open the drawing file again.
3. From the markup icon select stamp template, open, and select your saved template
4. In the Viewer, use the Zoom Window tool to zoom into the area where you want to place the offset. In this example we want to place our offset in the bottom right corner.
5. Select the Rectangle tool. Select a color that's easy to see. Set the fill style to solid. Draw a rectangle that easy to see and manipulate in that bottom right corner
6. Save your stamp template again with a new name

7. Close the stamp, and then test the results by performing a batch stamp; select the file from the drawings folder and click on the stamp icon, select advanced tab, you may now either select a template or manually configure.
8. To manually configure the batch stamp you do not need to select a saved template. Leave merge documents on No, leave the template name blank, select the output file type PDF, place a check in the desired destination folder, typically the approved folder. For testing purposes leave the burn in markups and inherit metadata set to no. In our example we place it in the bottom right. Pages to stamp select all, select stamp- This is where you will select the last stamp that you saved. Click process batch.
9. From the approved folder, open the file, and confirm that the stamp is correct. We can now open the stamp template and change the size and color of the offset so it is hidden.
10. To do this return to drawings folder, open the file, from the markup menu select the stamp template menu, open, then select the template you want to modify.
11. Use the zoom window tool to zoom into the offset, use the markup select tool to select the square, in the properties bar, change the color to white, and then using your cursor click and drag the inside handle on the corner to shrink your offset.
12. Once the offset has been modified go back to the markup menu, stamp templates, and select save or save as. We recommend that you complete one last batch stamp test to confirm that the results are satisfactory.

#### TIPS:

If you need to adapt a stamp template from one size to another, it is best to start with the smallest sheet size first. Recommend you create a stamp for each source style type: .pdf, .dwg, etc

1. NOTE: The variable text button  is only available when in stamp authoring mode when using the markup text tool, or when a single text entity is selected.

Now you know how to create a stamp template. Thank you for watching.

**Adapting a stamp template from one sheet size to another:**

1. Open a file of the new size or type, click the Annotate menu, and select the stamp tool from the Markup tools on the left.
2. Select from the list the stamp you want to adapt, and apply it.
3. Use the markup select tool to select the stamp, and copy it.
4. Click the Markup icon in the upper left hand corner, select Stamp template, and then New.
5. Paste the stamp from the clipboard.
6. Save as... with a new name that applies to this sheet size or file type.