Export to Excel by Page Plugin

User Guide

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Overview

This guide will teach you how to properly use the tools and features found within the Export to Excel by Page Plugin. It is designed for use with PlanSwift® Takeoff and Estimating Software. This guide is not meant to be a step-by-step "walk through" document, although it can be used as a reference for getting the work done. If you encounter technical difficulty, consult this guide (including the FAQ section of this user manual) or contact the technical support department at:

<div align="center">

PlanSwift® Technical Support

support@PlanSwift.com

1-888-752-6794 ext. 2

</div>

PlanSwift also offers additional training. For training options, contact the training department at:

<div align="center">

PlanSwift® Training Department

training@PlanSwift.com

1-888-752-6794 ext. 4

</div>

Purchasing and Installation

Purchasing Plugins

If you need to purchase PlanSwift or a plugin product, contact the Sales Department at:

PlanSwift® Sales

sales@PlanSwift.com

1-888-752-6794 Ext. 1

Installation and Uninstallation

Installing and uninstalling plugins and starter packs is simple. For installing them, click on the Import Plugin Package icon (arrow 1 in Figure 1) from the PlanSwift Main Ribbon-bar **Plugin** tab (arrow 3 of Figure 1) and follow the prompts from there. For uninstalling, click on the Uninstall Plugin (arrow 2 in Figure 1) and follow those prompts.
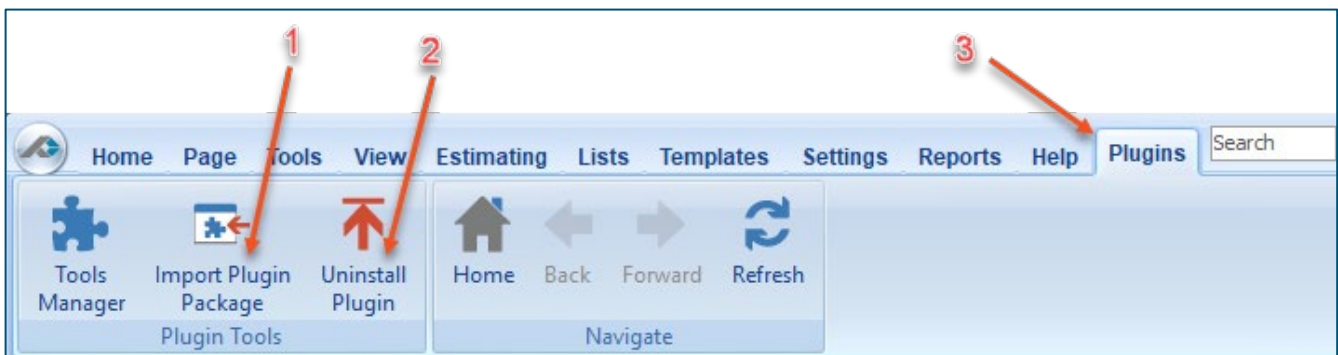

Figure 1

Features

The Export to Excel by Page Plugin installs an **Export by Page** icon onto the Home tab ribbon-bar, which allows you to export digitizer items to an Excel file, a CSV file, or to the Windows Clipboard. This is particularly handy because displaying the takeoffs individually allows for a better assessment of takeoffs than is allowed by the Estimating screen, which combines all takeoffs of the same type together. The instructions below will guide new users through how to use the Export to Excel by Page Plugin using the

new sample plans released with PlanSwift 10.2. We highly recommend purchasing a training package for accelerated learning and faster customization.
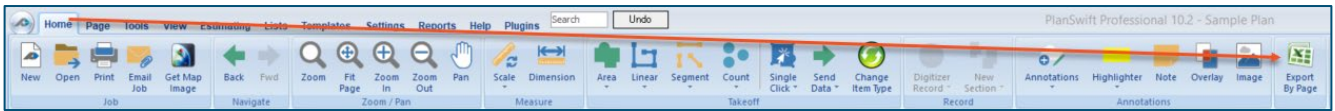

Figure 2

How To

How to: Export to Excel by Page

The Export to Excel by Page Plugin tool allows you to export takeoffs from the **Pages,Bookmarks** window (Figure 3) into to an Excel file, to a CSV file, or to the Clipboard.
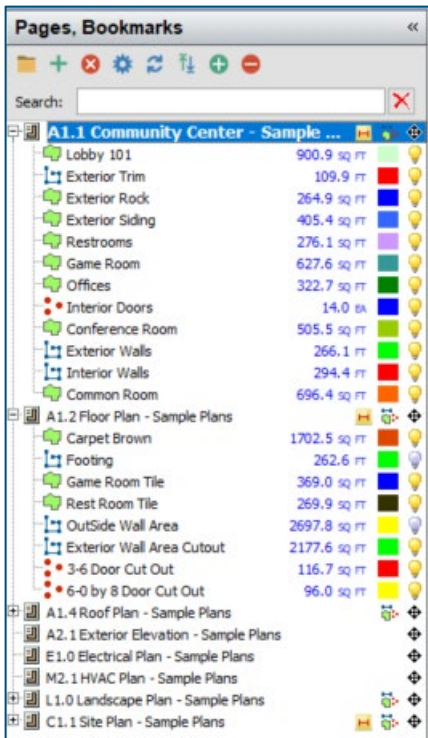

Figure 3

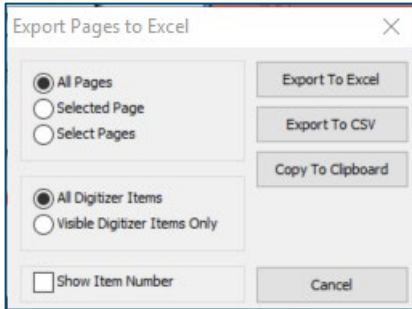Clicking on the **Export By Page** icon opens the **Export Pages to Excel** window.

Figure 4

The **Export to Excel**, **Export To CSV**, and **Copy To Clipboard** options allow takeoffs to be exported to an Excel file, to a CSV formatted file, or to the Windows Clipboard, respectively. When exporting to an Excel file, Excel opens automatically.

The options in the top left box in the **Export Pages to Excel** window (Figure 4) allow you to select **All Pages**, **Selected Page**, or **Select Pages**. Selecting **All Pages** exports takeoffs for all pages in the **Pages,Booksmarks** window (Figure 3). Selecting **Selected Page** exports takeoffs only for the selected page in the **Pages,Booksmarks** window. Selecting **Select Pages** opens the **Select Pages** window, allowing you to select one or more pages to export from (use **Shift** or **Ctrl** keys to select a range of items or multiple items).
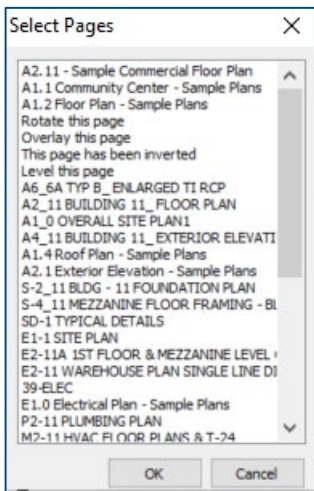

Figure 5

The options in the second box down in the **Export Pages to Excel** window (Figure 4) allow you to select whether all digitizer items are to be exported or to elect not to export those that have been hidden (yellow lightbulb icons clicked on so that they are grayed out).

The option in the third box down allows for selection of **Show Item Number**. Selecting this adds an **Item Number** column when the takeoffs are exported. The **Item #**'s may be added in the takeoff's advanced properties window (Figure 6), which is seen by double-clicking a takeoff item (in this case "Lobby 101", see arrow 1 of Figure 6), and then clicking on **Advanced** (arrow 2 of Figure 6). This opens the advanced **Properties** window for "Lobby 101" (arrow 3 of Figure 6). The item number may be entered in the **Formula** column on the **Item #** row (arrow 4 of Figure 6).
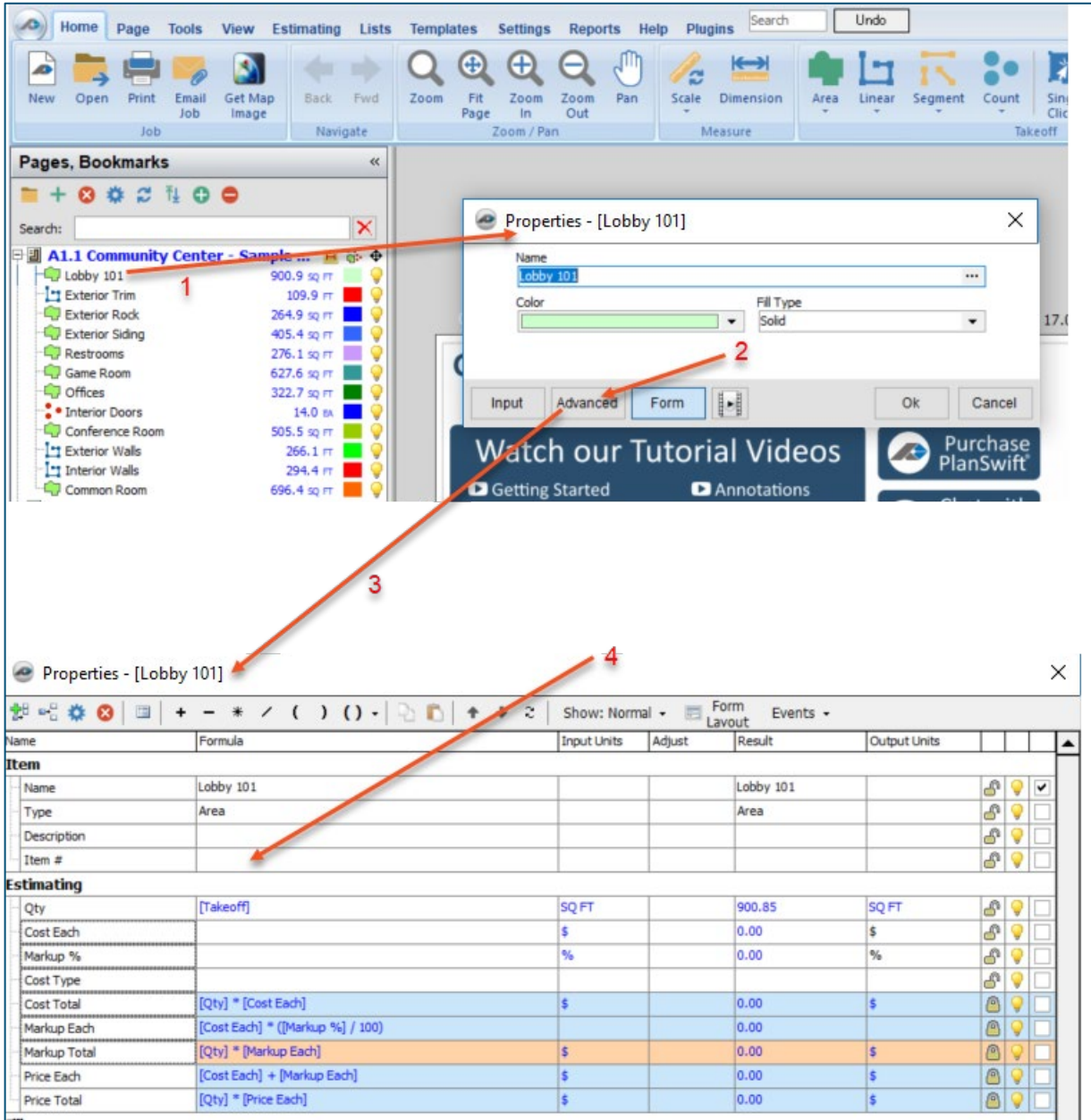
Figure 6

As an example, click on the yellow bulb for the "Game Room" takeoff in the **A1.1 Community Center - Sample** (arrow 2 of Figure 7). Then click on the **A1.1 Community Center - Sample** (arrow 1 of Figure 7). This selects the **A1.1** sample plan and will hide the "Game Room" takeoff from the exported results.
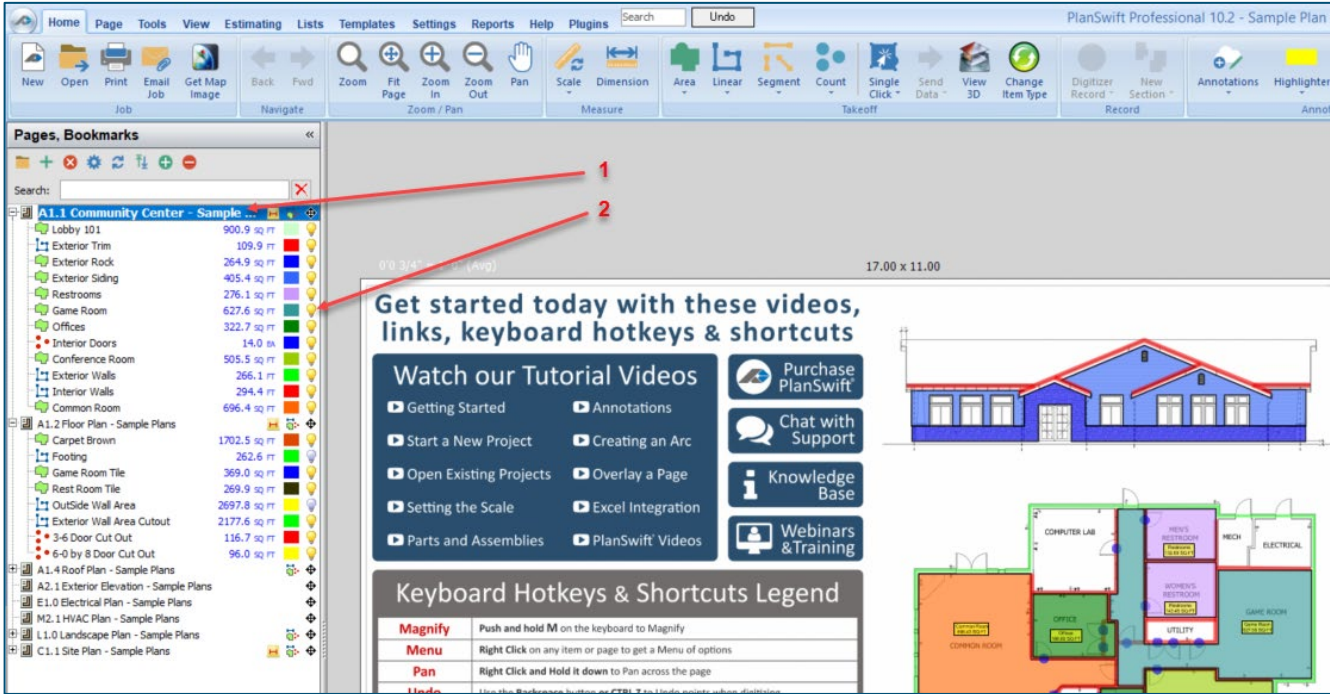

Figure 7

Click on the **Export By Page** icon (see Figure 2) to open the **Export Pages to Excel** window (arrow 2 of Figure 8). Notice at arrow 1 of Figure 8 that the "Game Room" takeoff has a grayed-out lightbulb.
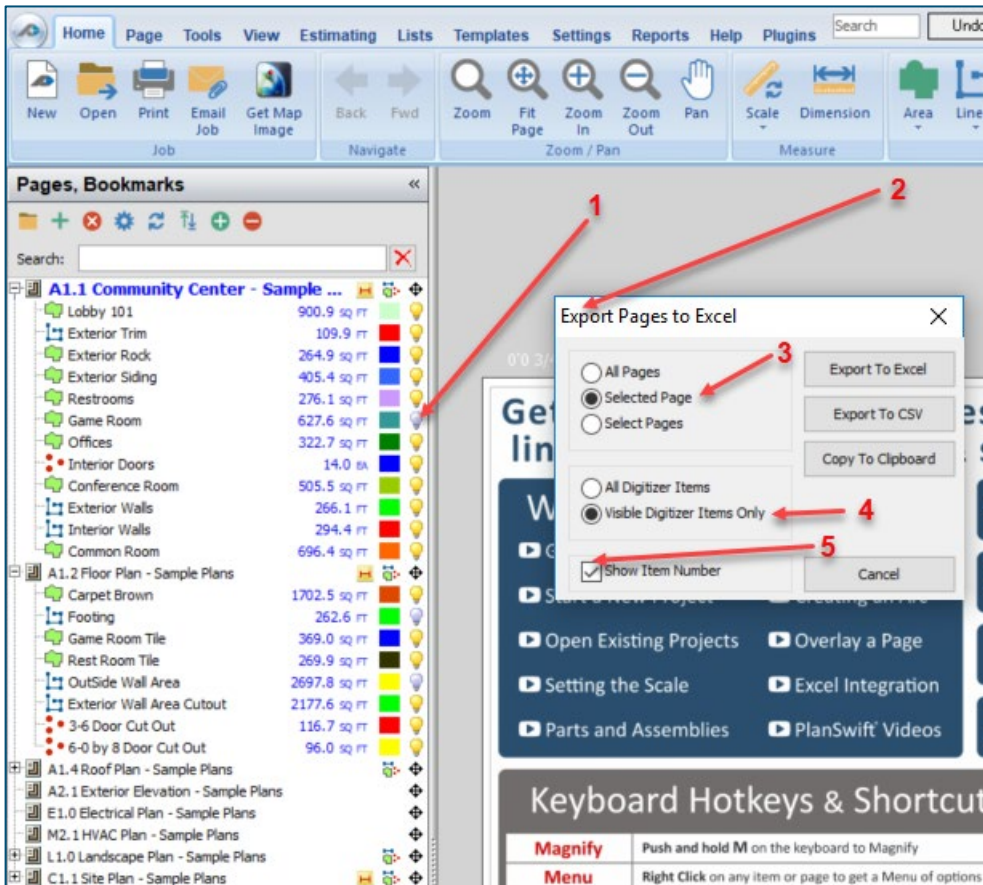

Figure 8

Click on **Selected Page** (arrow 3 of Figure 8). Click on **Visible Digitizer Items Only** (arrow 4 of Figure 8). And click on **Show Item Number** (arrow 5 of Figure 8). Finally click on **Export to Excel** (arrow 6 of Figure 8). This will now export the takeoffs to Excel (Figure 9).

Figure 9

Notice at arrow 2 of Figure 9 that the "Game Room" is not included since its display was turned off and **Visible Digitizer Items Only** was selected. Notice also that the **Item Number** column (arrow 1 of Figure 9) is visible because the **Show Item Number** checkbox was selected. Notice too that only sample plan **A1.1** takeoffs are shown because it was the only plan selected and because **Selected Page** was selected.

If you had clicked on **Copy To Clipboard** instead of **Export to Excel**, you could then start an application such as Excel or Word and paste the contents of the Clipboard into that application.

In the exported Excel file, the columns include column A, Page, which is the name of the sample plan page in this case; column B, Digitizer Item, which is the name of the takeoff; column C, Item Number, which contains the item number if **Show Item Number** was selected when exporting; column D, the takeoff unit value; column E, the Units; and column F, the color of the takeoff.

FAQ

Question: I've read this user guide, and I still have questions. What do I do?

> **Answer:** PlanSwift recommends that you purchase a training package. We highly recommend new users purchase a training package, because training is customized to each user. We offer [one-on-one training](#) and [classroom training](#). Contact training@PlanSwift.com or at 1-888-752-6794 Ext. 4.

Question: Can I modify the columns that will be exported to Excel?

> **Answer:** No. However, the **Item Number** column is the only column that can be included or excluded when you export by selecting or not selecting the **Show Item Number** checkbox in the **Export Pages to Excel** window.