Electrical Starter Pack User Guide

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PlanSwift

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Overview

This guide will teach you how to properly use the tools and features found within the Electrical Starter Pack. 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 <u>FAQ</u> section of this user manual) or contact the technical support department at:

PlanSwift® Technical Support <u>support@PlanSwift.com</u> 1-888-752-6794 ext. 2

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

PlanSwift® Training Department training@PlanSwift.com

1-888-752-6794 ext. 4

Purchasing and Installation

Purchasing Plugins

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

PlanSwift® Sales <u>sales@PlanSwift.com</u> 1-888-752-6794 Ext. 1

Installation and Uninstallation

Installing and uninstalling 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 Electrical Starter Pack includes **Electrical Assemblies**, **Electrical Parts**, and **Electrical Symbols** found in the **Templates** tab of PlanSwift (Figure 2, arrows 1, 2, and 3). This starter pack has an additional feature that allows you to add your own electrical symbols. Note that the **Electrical Symbols** tab is not visible after the plugin is installed until you click on the **down-arrow** (arrow 4) and select the **Electrical Symbols** tab (arrow 5) to be visible. The assemblies, parts, symbols, and lists of them (on the **Lists** tab) are listed in the <u>Compendium</u> at the end of this guide. The templates are also visible in the **Templates** sidebar window (arrow 6), where they may be used to initiate takeoffs. With these Electrical Starter Pack assemblies and parts, PlanSwift users can easily customize assemblies and parts for later use.

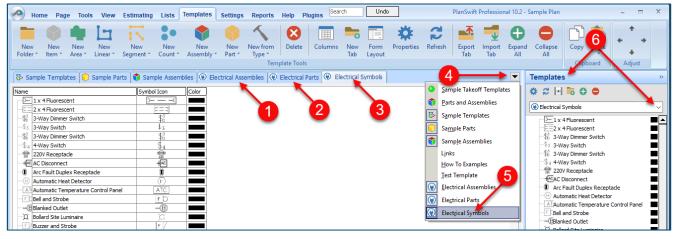


Figure 2

Starter Packs contain a large library of prebuilt templates, parts and assemblies. Modifying the library of parts and assemblies for any Starter Pack allows users the ability to customize their Templates to their specific needs. Users will save countless hours of setup by utilizing a Starter Pack as their starting point for building custom parts and assemblies. The instructions below will guide new users through the basics of modifying parts and assemblies. We highly recommend purchasing a training package for accelerated learning and faster customization.

How To

How to: Add Your Own Electrical Symbol Icons

Adding an electrical symbol icon requires you to copy an existing template item, paste it as a new template item, rename it, assign a new icon to it, and then add it to the **Complete Symbol List** under the **Lists** tab.

- 1. To create a new symbol icon, click on the **Templates** window (see Figure 2)
- 2. Click on the **Electrical Symbols** tab. See <u>Features</u> for how to unhide this tab.
- 3. Click to select any **template item** from the list on the **Electrical Symbols** tab.
- 4. Click on **Copy** on the **Templates** tab ribbon-bar.
- 5. Click on the **Paste** button to paste the copy right below the original.
- 6. Right-click (or double-click) on the name to open the **Properties** window.
- 7. Double-clicking in the **Symbol Icon** field opens a window, allowing you to browse and select a new symbol (we recommend using .PNG images).
- 8. You must give the newly created template item a unique **Name**.

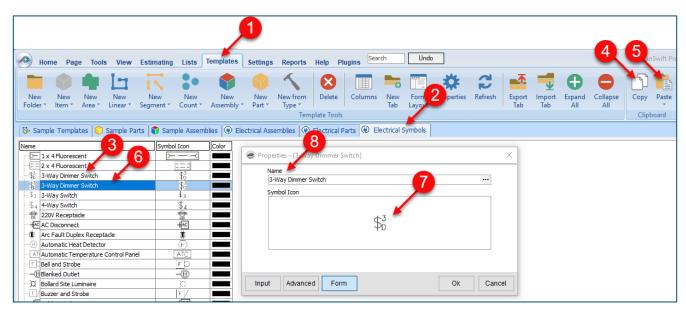


Figure 2

- 9. Click on the Lists tab (Figure 3) on the Main ribbon-bar menu.
- 10. Click on **Complete Symbol List** under the **Electrical** folder. The main window displays the names of electrical symbols.
- 11. Click in this window, scroll to the bottom (optional), and add the name of the new symbol icon you created. (Adding your new names to the bottom allows you to track your changes to the list.)

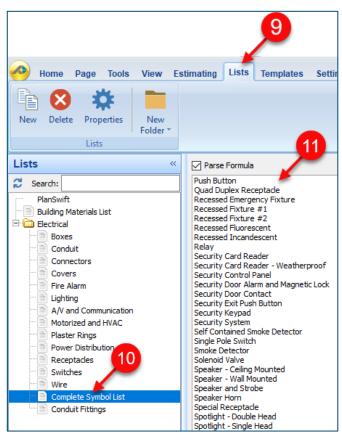


Figure 3

How to: Copy and Paste an Assembly

The purpose of copying and pasting an assembly is to allow the user to copy and then modify the assembly for later use. As an example, you may want two different assemblies: one might include a part, and another might have an alternative part or not include that part at all. By copying one assembly and then modifying and renaming the copy (for easy identification), you can have two different assemblies available, allowing for easier and faster takeoffs. Figure 4 shows the **Templates Tab** (arrow 1) and the **Area Takeoff Item Example 1** assembly (arrow 2). If you want to add another assembly but with no **Material 3**, then you would click on the assembly you want to copy (arrow 2), click on **Copy** (arrow 3), and then click on **Paste** (arrow 4).

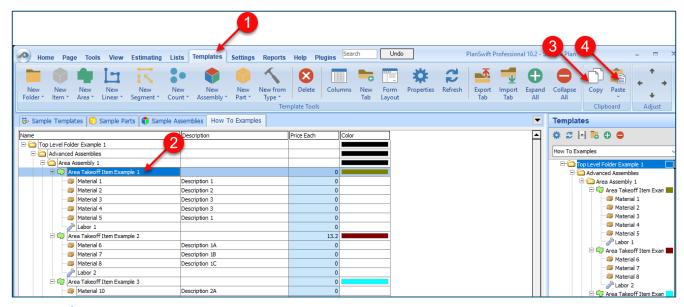


Figure 4

Figure 5 shows the original (arrow 1) and new **Area Takeoff Item Example 1** assembly (arrow 2). To delete the **Material 3** (arrow 3) from the newly created **Area Takeoff Item Example 1** assembly (arrow 2), click on **Material 3** (arrow 3), click on **Delete** (arrow 4), and click on **OK** in the popup window to confirm the deletion.

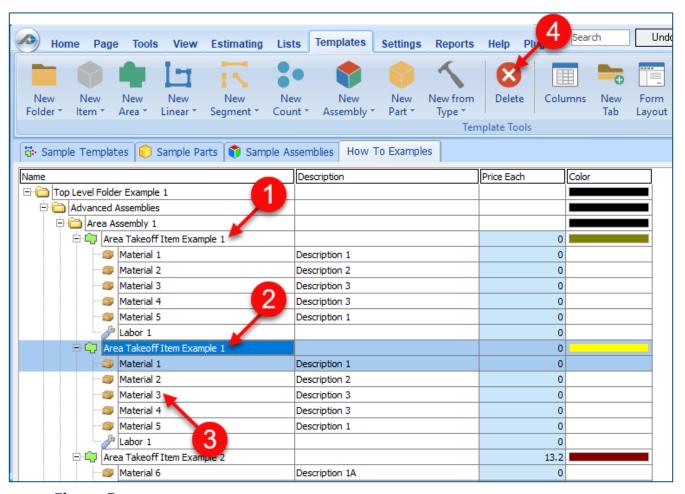


Figure 5

Figure 6 now shows the two assemblies, one with (arrow 1) and one without (arrow 2) the **Material 3** item. You can now change the description of the duplicated **Area Takeoff Item Example 1** (arrow 3) without the **Material 3** item by double-clicking the duplicate **Area Takeoff Item Example 1** (arrow 3).

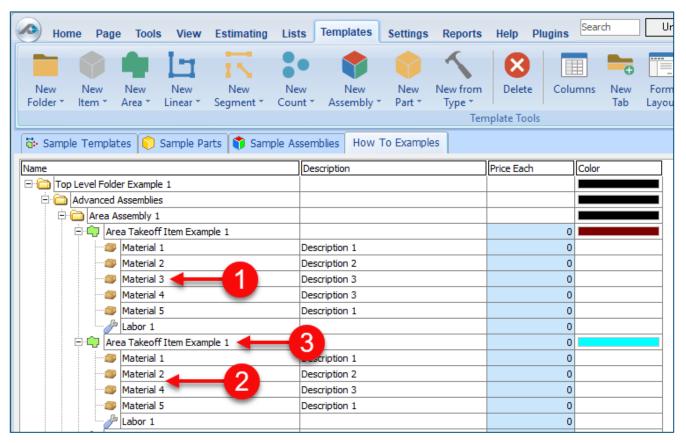


Figure 6

This opens the **Properties** – [Area Takeoff Item Example 1] window (Figure 7) where you can change the assembly's name to something like Area Takeoff Item Example 1— **No Material 3** to make it easier to identify.

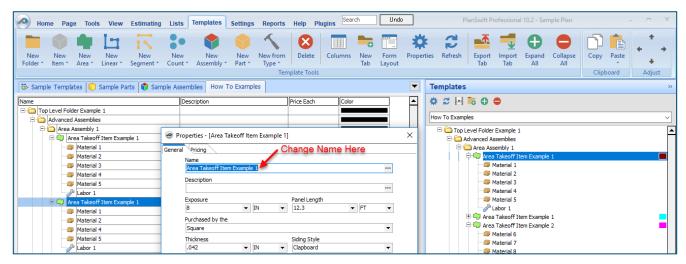


Figure 7

Click on **Ok** in the **Properties** window after you have entered the name. Figure 8 shows the new name.

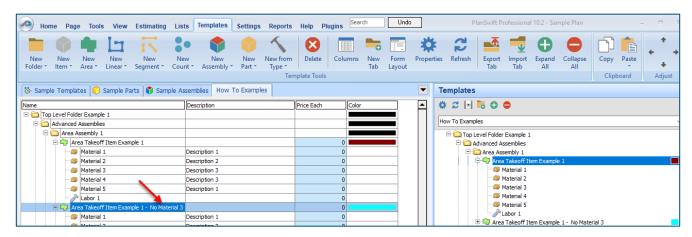


Figure 8

To perform a takeoff with the **Area Takeoff Item Example 1—No Material 3** assembly, go to the takeoff page, click on the green **Record Button** (see the arrow in Figure 9) in the **Templates** sidebar window, and then proceed to do your takeoff.

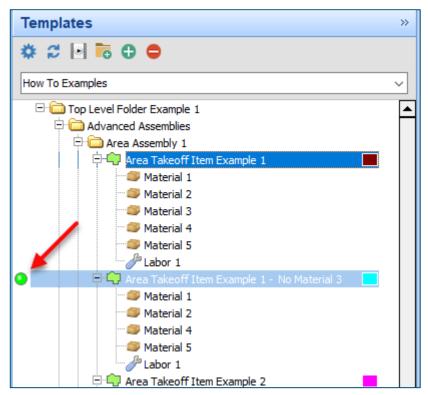


Figure 9

Disclaimer

Any modifications that a user makes to a Starter Pack should always be tested and verified by that user to ensure quantities and calculations are accurate. PlanSwift cannot verify the accuracy of modifications made to templates, parts and assemblies by the user.

How to: Copy and Paste Parts

Copying and pasting parts is handled similarly to copying and pasting an assembly. If, for instance, you want to move Material 6 in Area Takeoff Item Example 2 to Area Takeoff Item Example 1, click on Material 6 (Figure 10, arrow 1), then click on copy (arrow 2).

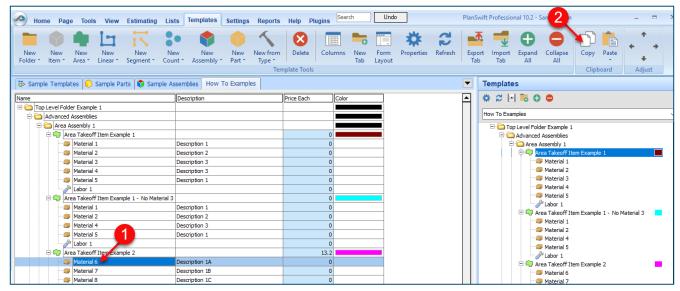


Figure 10

There are now two ways to paste the part. The first is to paste it at the same hierarchical level of a selected item, and the second is to paste it as a sub-item of a selected item. Figure 11 shows the **Paste** button. Clicking on the top half of the button pastes the part at the same hierarchical level of a selected item. Clicking on the dropdown half of the button, then selecting **As Sub-Item** pastes the part as a sub-item of the selected item.



Figure 11

Click on **Area Takeoff Item Example 1**, then click on the top half of **Paste**. As shown in Figure 12, **Material 6** gets pasted at the same hierarchical level as **Area Takeoff Item Example 1**.

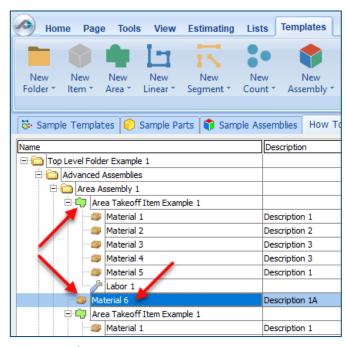


Figure 12

If you had selected the drop-down half of the **Paste** button, then **Material 6** would be a sub-item of **Area Takeoff Item Example 1**. Figure 13 shows **Material 6** as a sub-item.

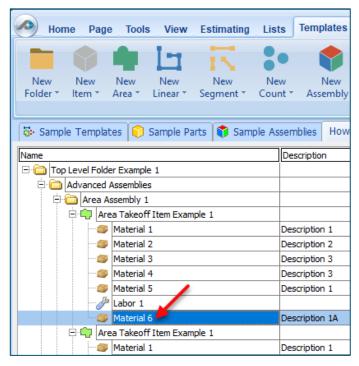


Figure 13

Another way to adjust the hierarchy of an item, such as **Material 6**, is to use the Main Ribbon bar arrow **Adjust** keys (Figure 14).

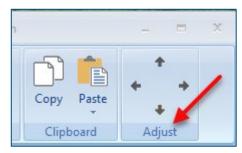


Figure 14

The left and right **Adjust** arrows move the item left and right (up or down) in the hierarchy, and the up and down **Adjust** arrows keys moves the item higher and lower in the list of items.

A shortcut to the **Copy** and **Paste** and **Past as Sub-Item** selections is available with a right-click menu. Figure 15 shows the **Copy**, **Paste**, and **Paste As Sub-Item** options on the right-click menu when **Material 6** is right-clicked on.

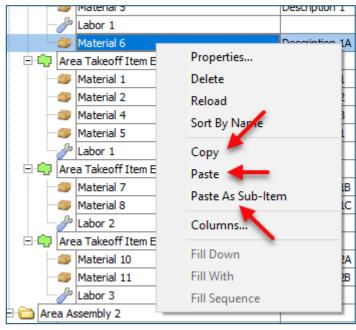


Figure 15

Double-clicking on **Material 6** allows you to change the name of the item and alter other properties of the item (Figure 16). To change the name of **Material 6**, double-click on the **Material 6** name, type the new name, and click on **Ok**.

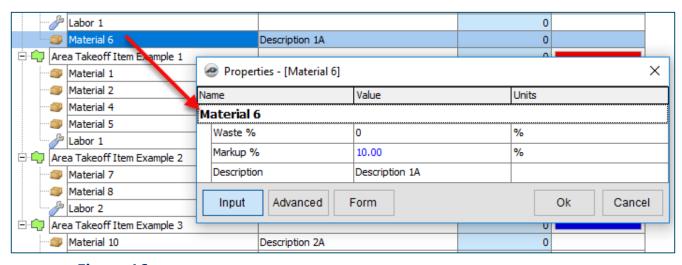


Figure 16

Figure 17 shows Material 6 renamed to Material 6A.

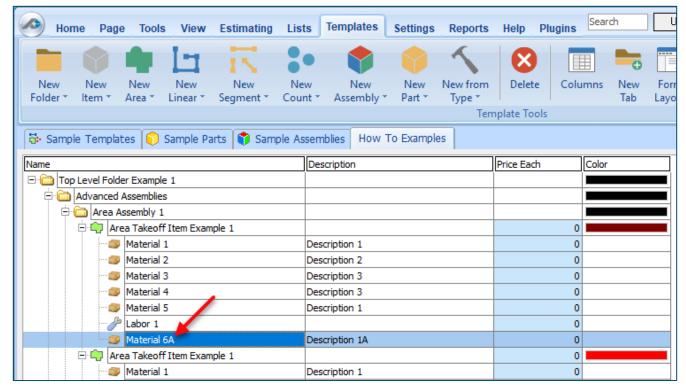


Figure 17

Disclaimer

Any modifications that a user makes to a Starter Pack should always be tested and verified by that user to ensure quantities and calculations are accurate. PlanSwift cannot verify the accuracy of modifications made to templates, parts and assemblies by the user.

How to: Drag and Drop Parts

Parts may be dragged and dropped from one assembly to another assembly. If, for instance, you want to drag the Material 8 item from Area Takeoff Item Example 2 up to Area Takeoff Item Example 1, click on Material 8 and drag it up to just below Material 6A (see Figure 18) and release the mouse button.

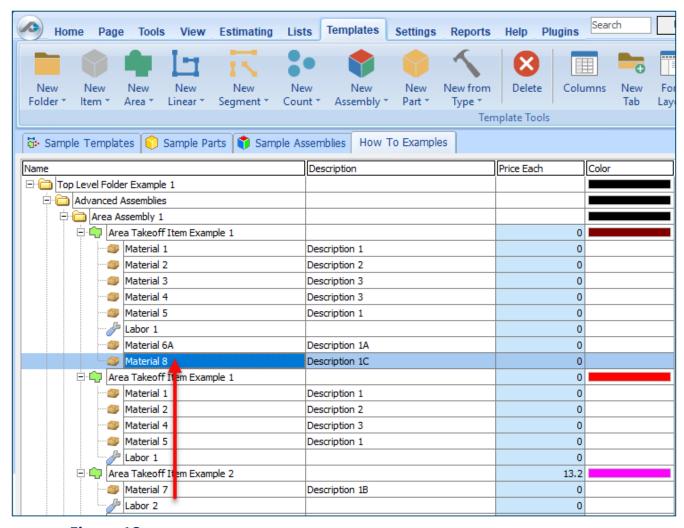


Figure 18

Notice that dragging the part this way *moves* the part from the **Example 2** assembly to the **Example 1** assembly, *not* leaving behind a copy.

The **Templates** sidebar window is a summarized view of everything in the Templates Tab. It is designed for easily dragging and dropping parts and for quickly launching takeoff templates and assemblies.

Parts may be dragged over from the **Templates** sidebar window into the **Templates Tab** window; note that dragging any part from the **Templates** sidebar window makes a copy of it. If, for instance, you want a **Material 7** item added to **Area Takeoff Item Example 1** as a sub-item, simply drag the **Material 7** from the right **Templates** sidebar window over on top of **Area Takeoff Item Example 1** label and release the mouse button. (Figure 19).

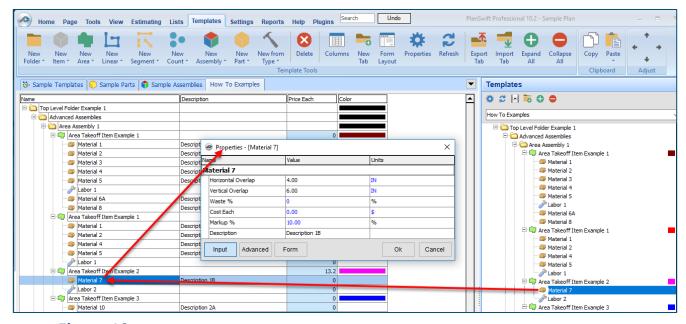


Figure 19

Figure 19 shows the **Material 7** item in place after it was dropped on top of **Area Takeoff Item Example 1.** In addition, the **Properties – [Material 7]** window automatically opens, allowing the user to change any properties for **Material 7**. Click on **Ok** to close the **Properties – [Material 7]** window.

Disclaimer

Any modifications that a user makes to a Starter Pack should always be tested and verified by that user to ensure quantities and calculations are accurate. PlanSwift cannot verify the accuracy of modifications made to templates, parts and assemblies by the user.

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 <u>one-on-one training</u> and <u>classroom training</u>. Contact <u>training@PlanSwift.com</u> or at 1-888-752-6794 Ext. 6.

Question: Does the Starter Pack include everything a contractor will need to generate an estimate?

Answer: No. A Starter Pack is a tool to get you started toward creating a complete estimate. For example, the Starter Pack does not include industry pricing for materials and labor. However, you can supply prices for materials and labor on the assemblies and labor included in the Starter Pack.

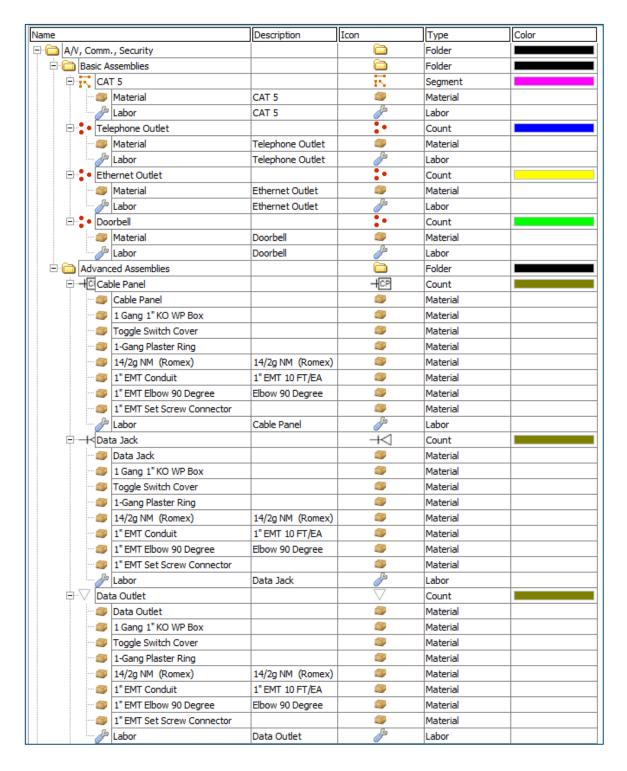
Question: Do I have to input all the pricing for all my parts?

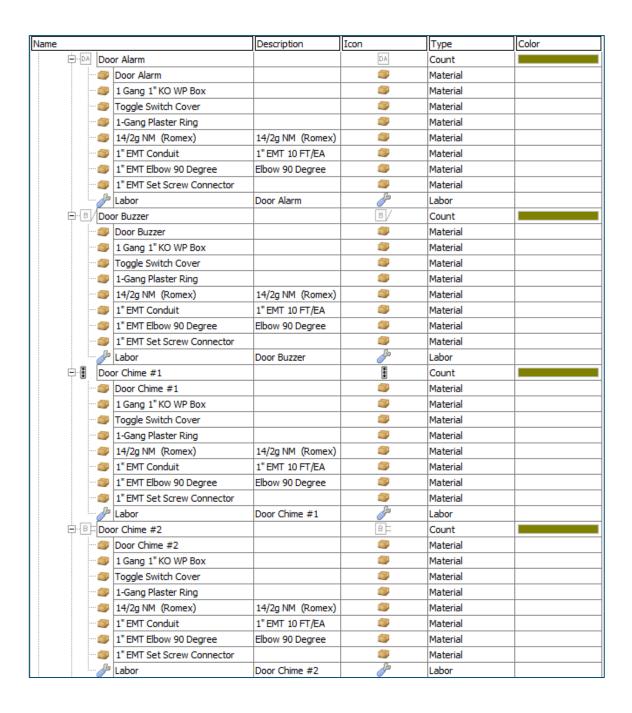
Answer: Inputting pricing is optional. You can use the Starter Pack to generate quantities that you can then send to your supplier, who can then provide you current pricing. Inputting pricing on your own is optional. If your industry's pricing is not subject to frequent changes, you may want to consider inputting your pricing in PlanSwift.

Compendium

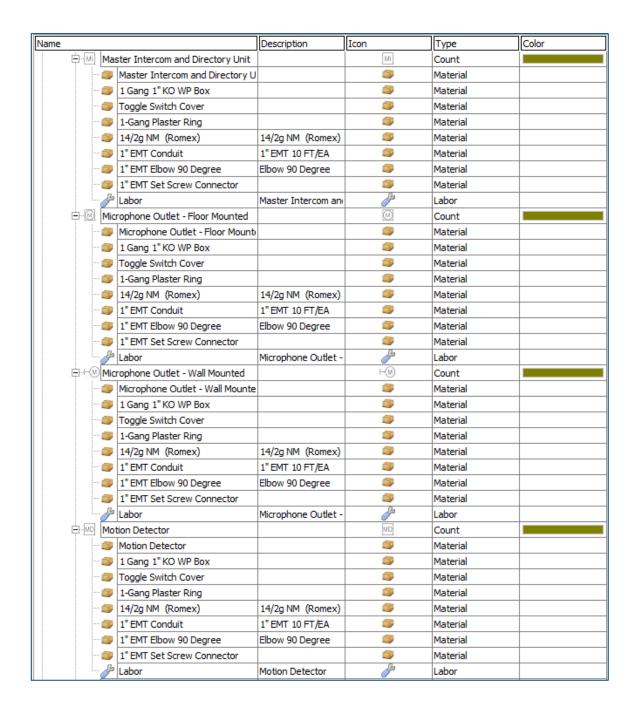
Electrical Starter Pack Templates

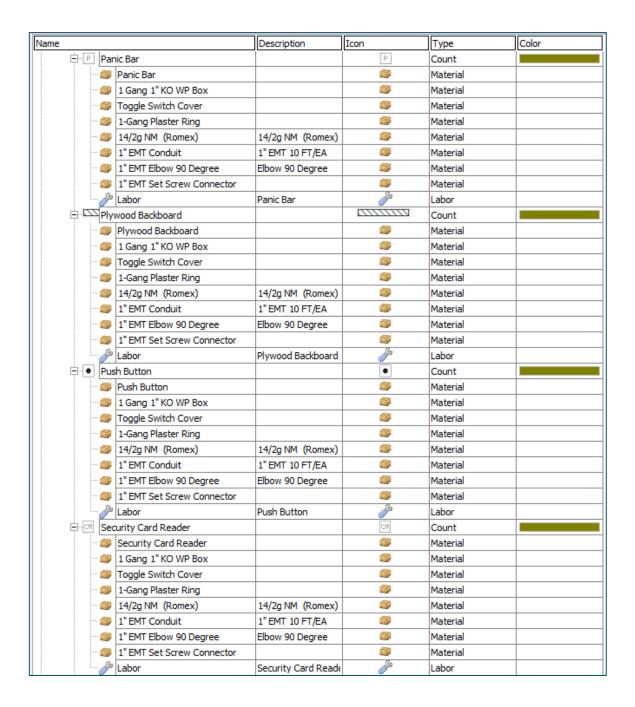
Electrical Assemblies

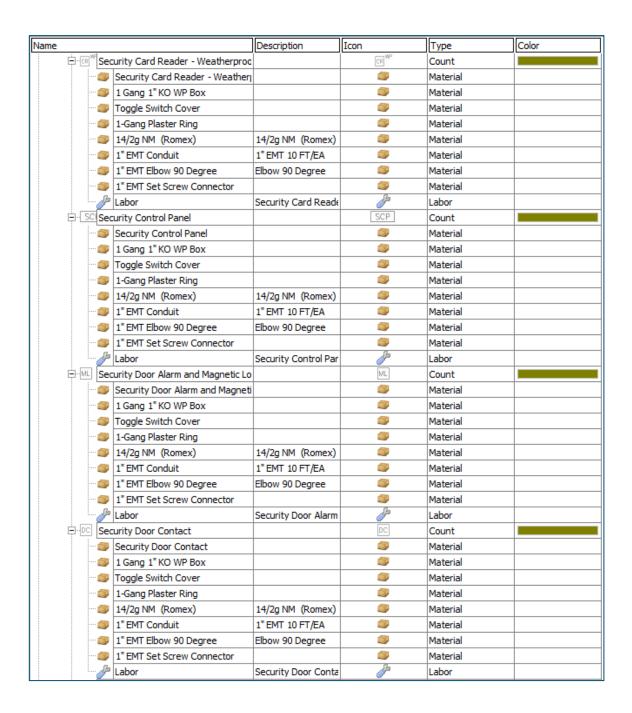


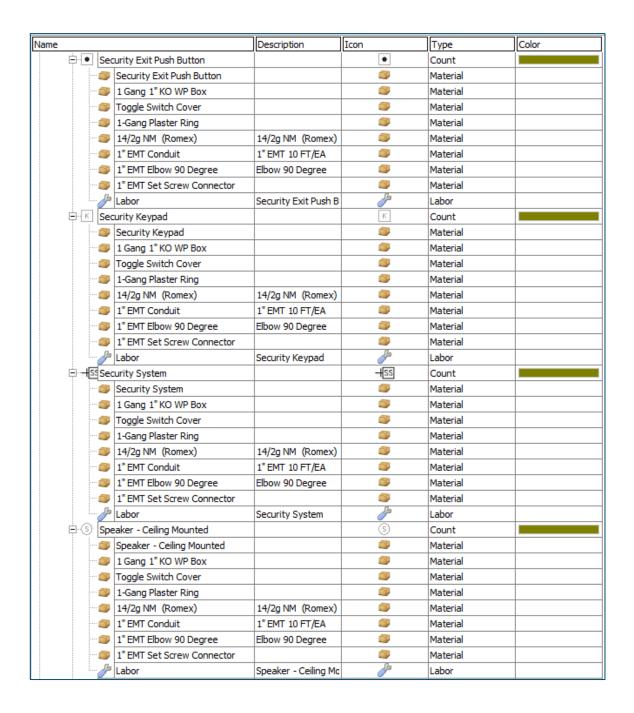


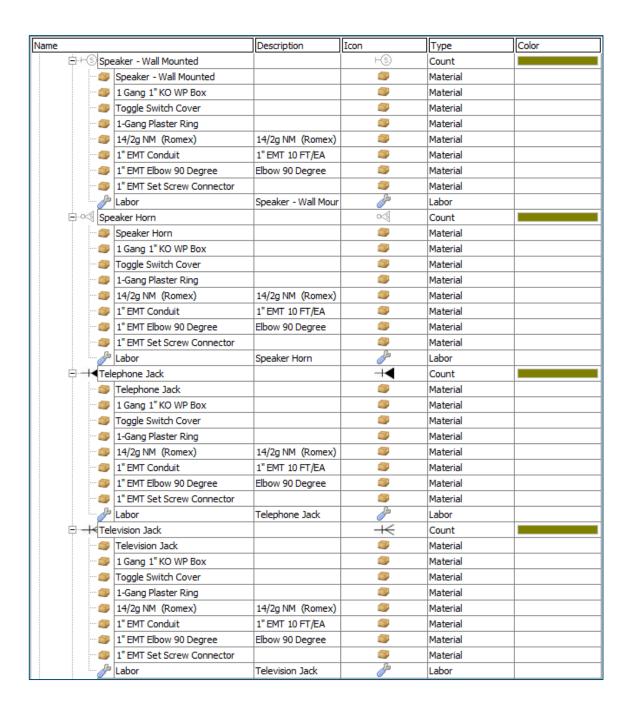


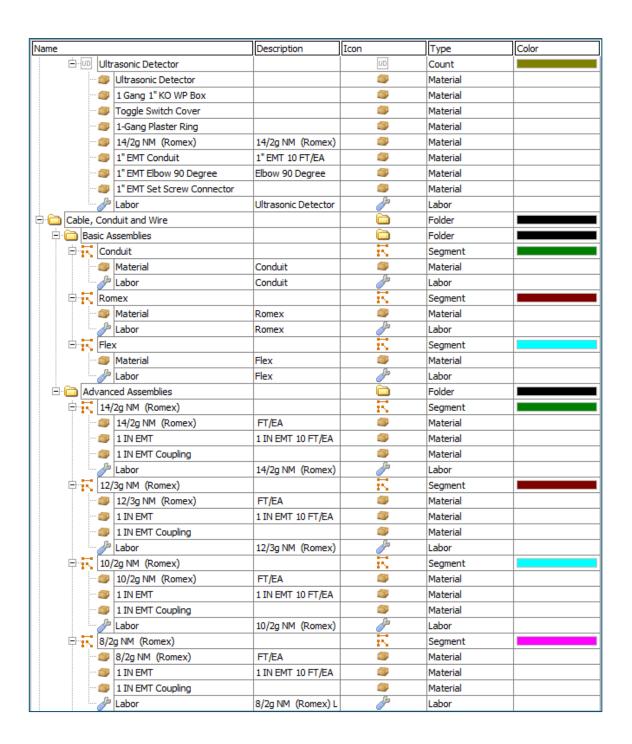


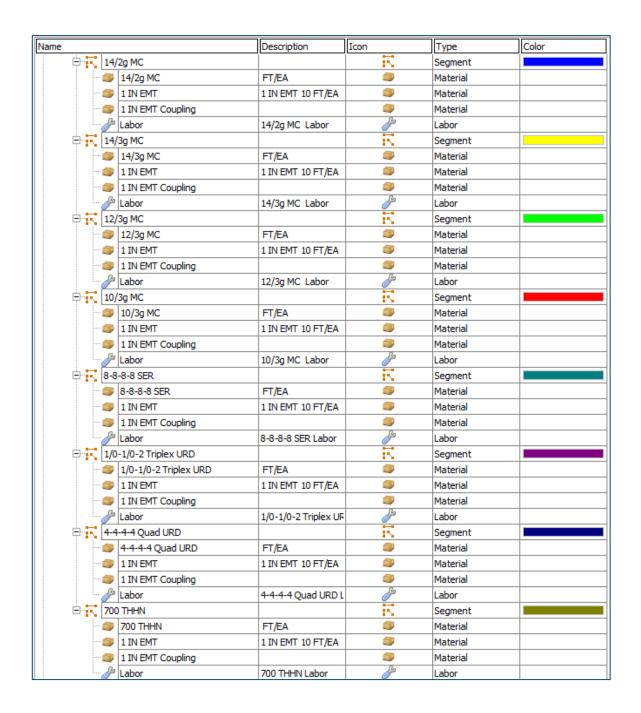


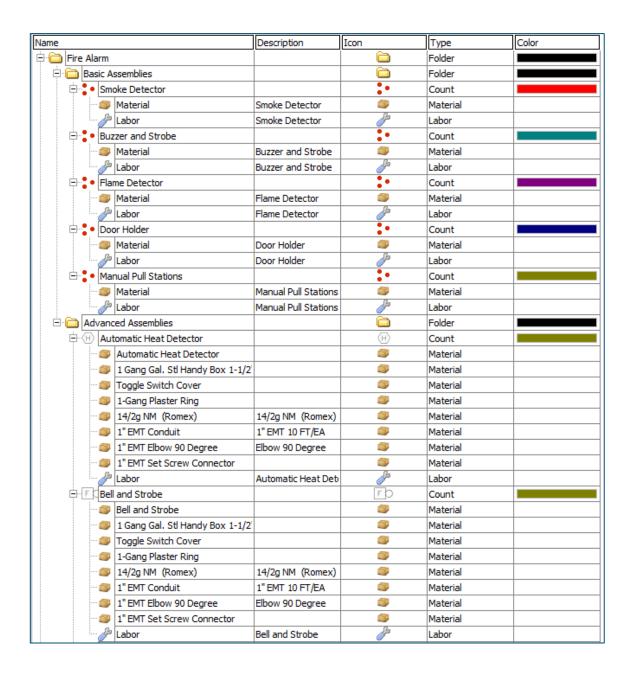


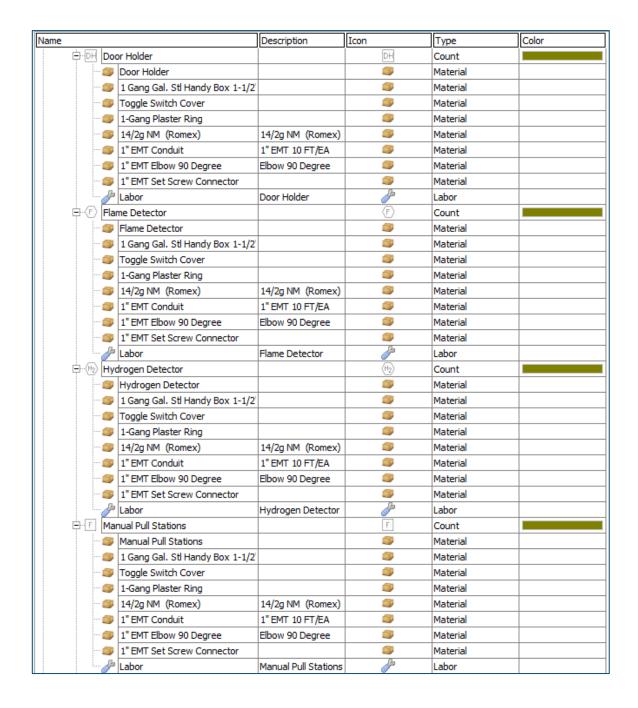


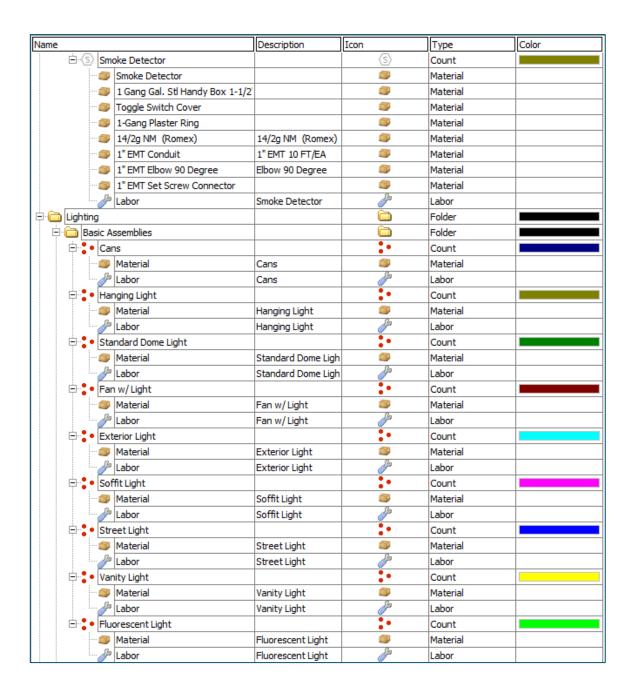


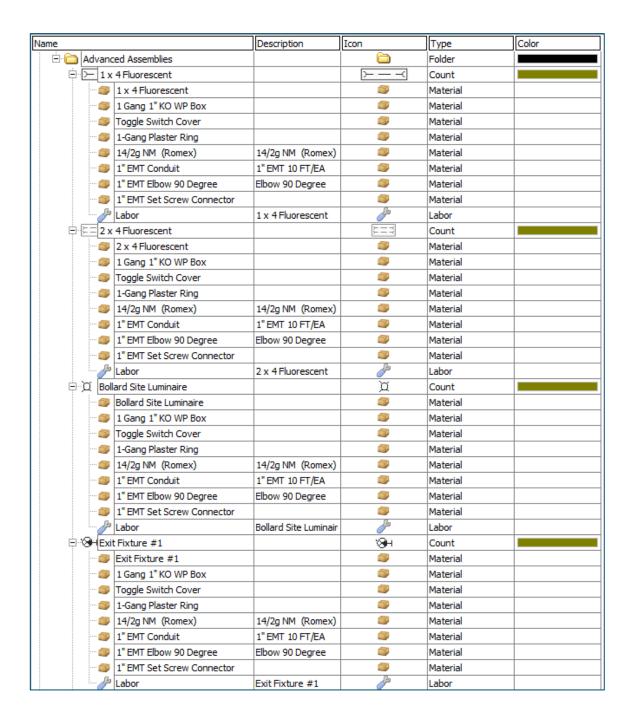


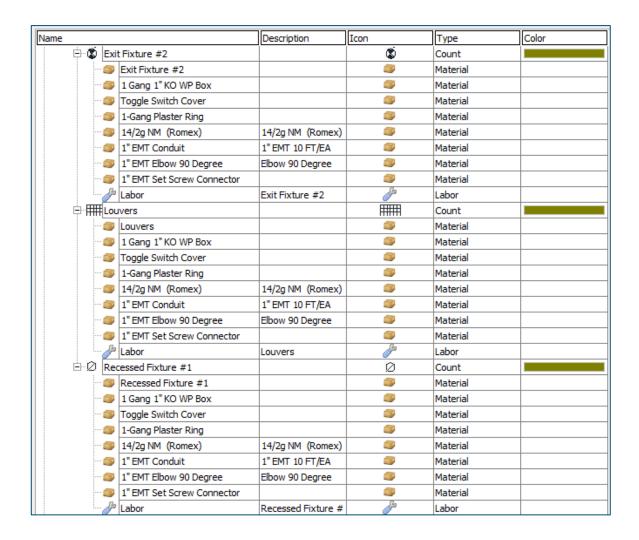


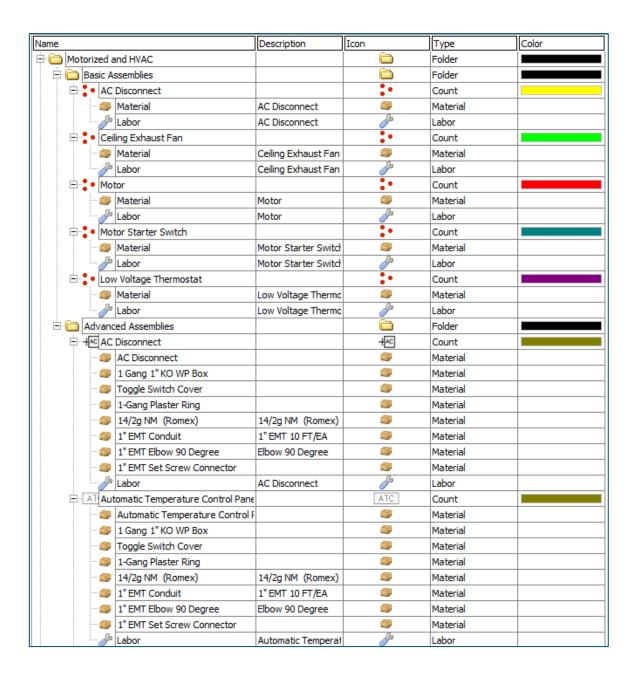


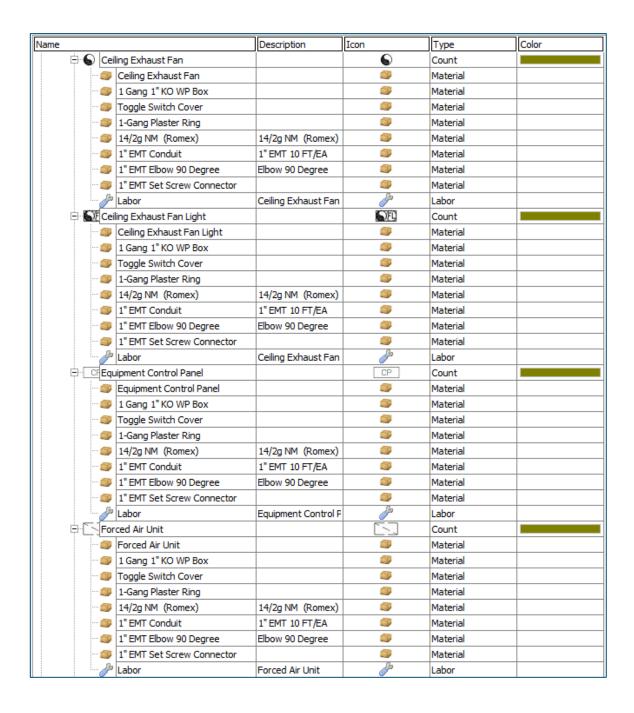


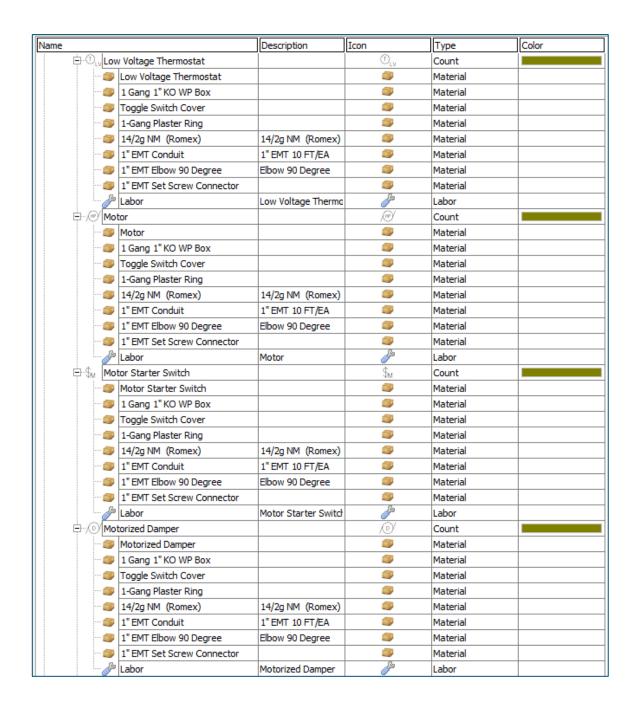


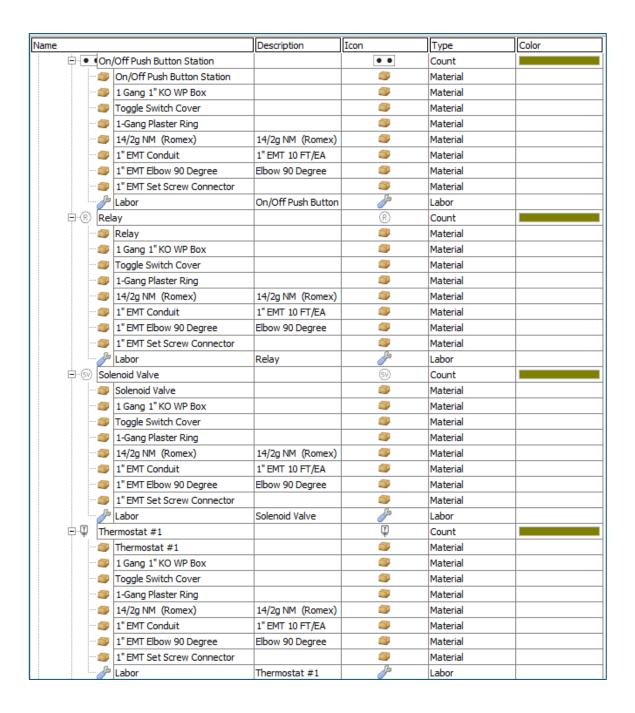


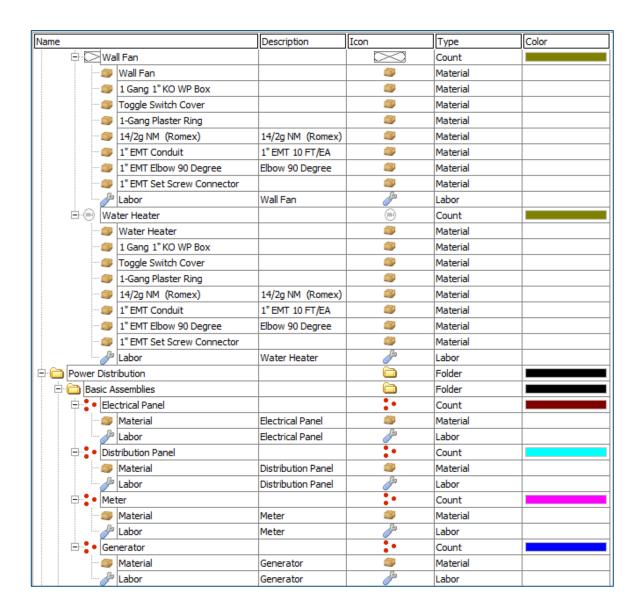


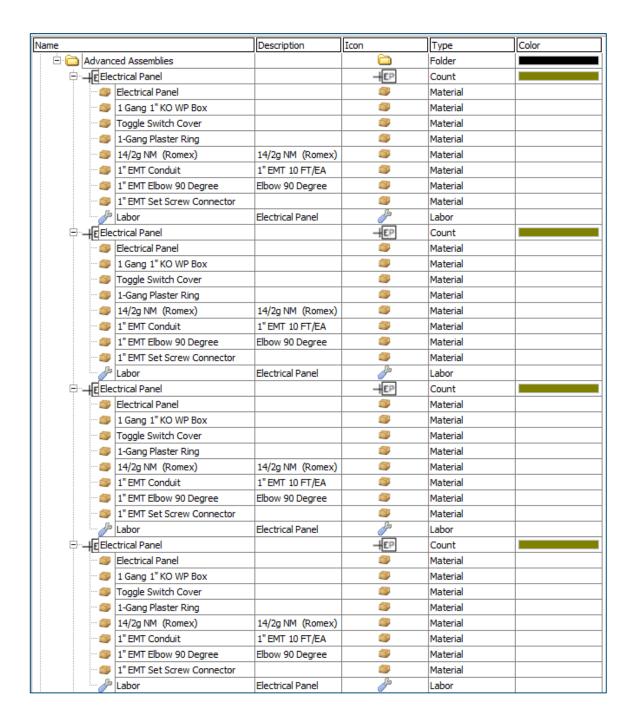




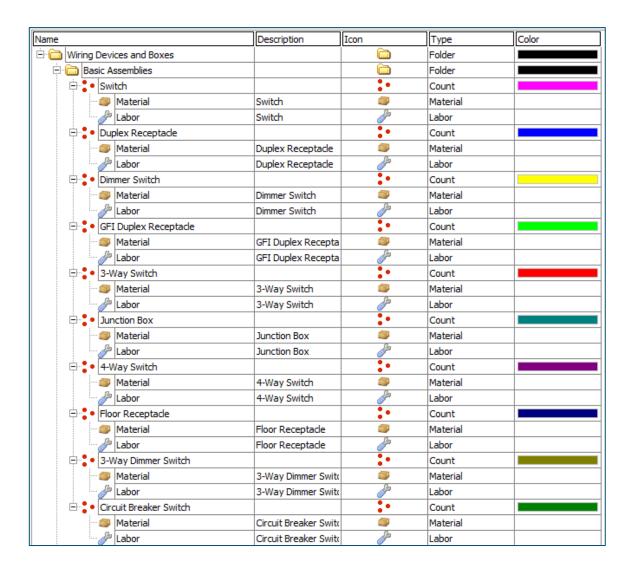


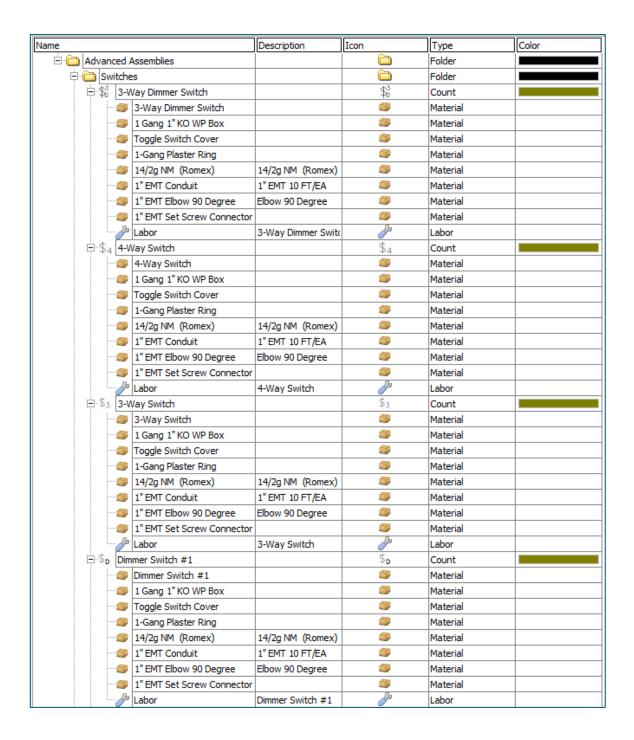


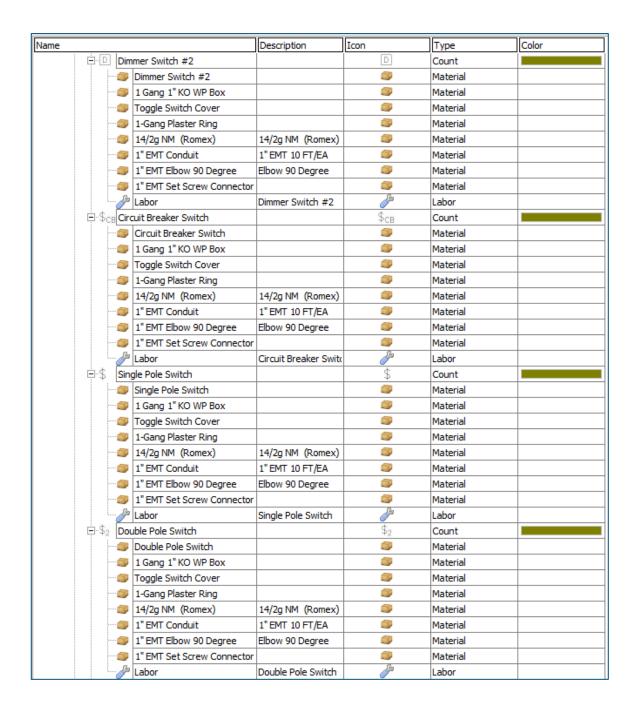


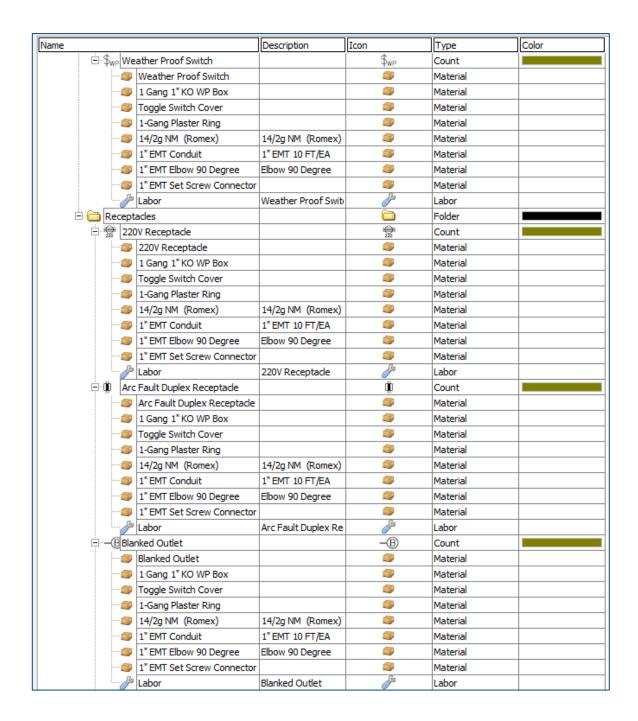


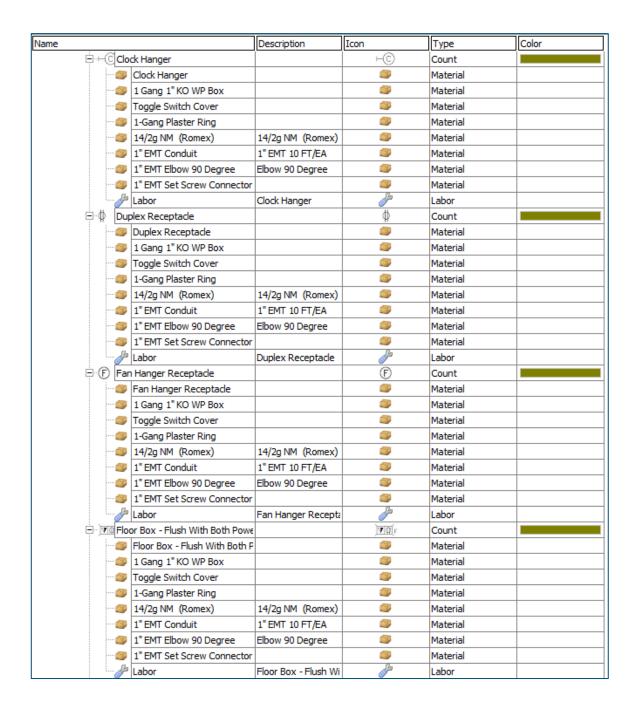


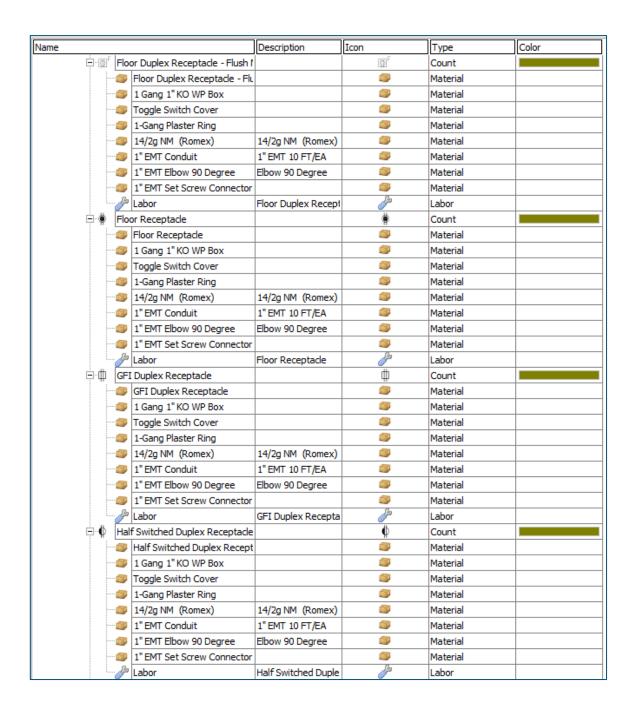


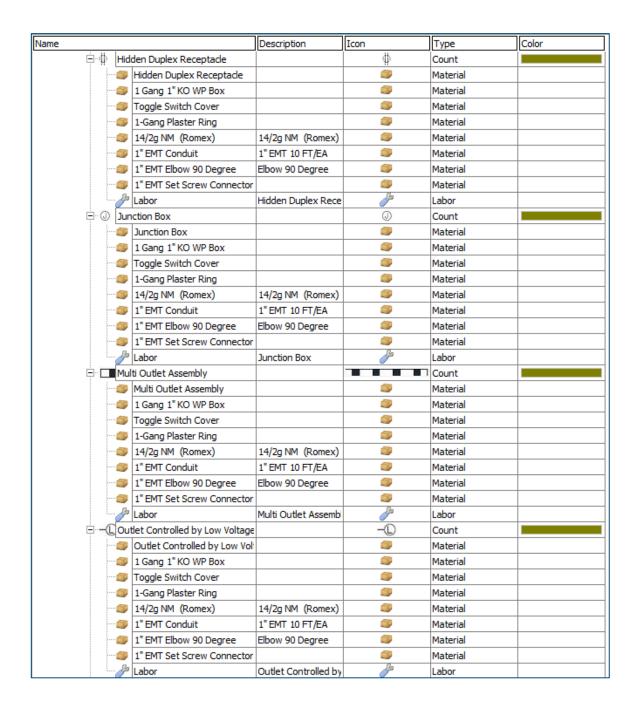


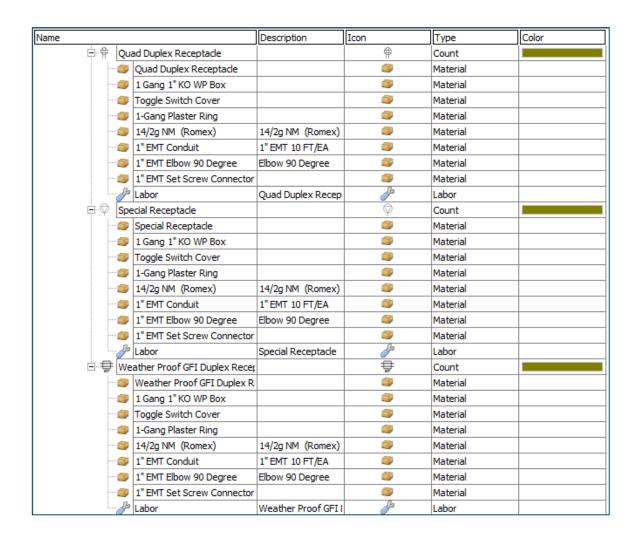




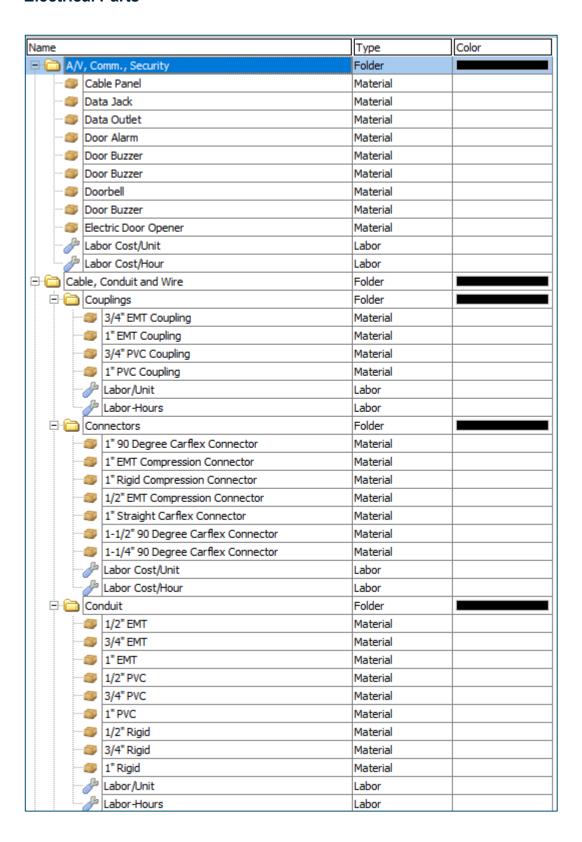




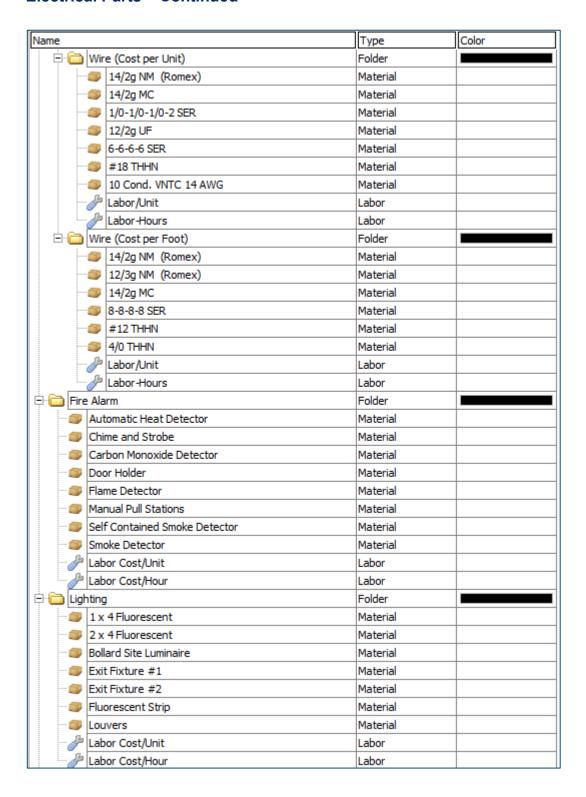




Electrical Parts



Electrical Parts - Continued



Electrical Parts – Continued

Name		Туре	Color
⊟ (mo	torized and HVAC	Folder	
🟐	AC Disconnect	Material	
🟐	Automatic Temperature Control Panel	Material	
🟐	Ceiling Exhaust Fan	Material	
🟐	Ceiling Exhaust Fan Light	Material	
🟐	Equipment Control Panel	Material	
🟐	Forced Air Unit	Material	
🟐	Low Voltage Thermostat	Material	
🟐	Motor	Material	
🟐	Motor Starter Switch	Material	
🟐	On/Off Push Button Station	Material	
🟐	Paddle Fan	Material	
🟐	Pressure Switch	Material	
🟐	Push Button	Material	
🗊	Relay	Material	
🟐	Thermostat #1	Material	
<i>}</i>	Labor Cost/Unit	Labor	
<i>}</i>	Labor Cost/Hour	Labor	
Po	wer Distribution	Folder	
<i>}</i>	Labor Cost/Unit	Labor	
🟐	Current Transformer Cabinet	Material	
<i>}</i>	Labor Cost/Hour	Labor	
🗊	Distribution Panel	Material	
🗊	Distribution Panel on Normal Feeder	Material	
🟐	Dry Type Transformer	Material	
🗊	Electrical Panel	Material	
🗊	Generator	Material	
🗊	Meter	Material	
🟐	Meter and Socket	Material	
→	ring Devices and Boxes	Folder	
📦	220V Receptacle	Material	
🟐	Arc Fault Duplex Receptacle	Material	
📦	Duplex Receptacle	Material	
🟐	Floor Receptacle	Material	
🟐		Material	
🏐		Material	
🏐	Quad Duplex Receptacle	Material	
🏐		Material	
🟐		Material	
		Material	
		Material	
🟐		Material	
	2 Gang Gal. Stl Sqr Box 2-1/8"x4"x4" 30.3 cu. in.	Material	
	Labor Cost/Unit	Labor	
ſ.	Labor Cost/Hour	Labor	

Electrical Symbols

Name		Symbol Icon	Color
- D-	1 x 4 Fluorescent	>	
		E=3	
\$3	3-Way Dimmer Switch	\$3	
\$3		\$3	
-\$4	-	\$4	
		→	
	AC Disconnect	+AC	
_	Arc Fault Duplex Receptacle	100	
(H)	Automatic Heat Detector	(F)	
-	Automatic Temperature Control Panel	ATC	
	Bell and Strobe	FD	
	Blanked Outlet	-B	
-	Bollard Site Luminaire	ă	
	Buzzer and Strobe	F/	
	Cable Panel	-ICP	
	Carbon Monoxide Detector	(a)	
	Ceiling Exhaust Fan	6	
	Ceiling Exhaust Fan Light	S FI	
	Chime and Strobe	F	
	Circuit Breaker Switch	\$08	
	Clock Hanger	+0	
	Control Relay	(CF)	
	Current Transformer Cabinet	CT	
	Data Jack	+<1	
	Data Outlet	$\overline{}$	
-\$n	Dimmer Switch #1	\$ _D	
	Dimmer Switch #2	Ö	
	Distribution Panel	7111117	
	Distribution Panel on Normal Feeder	TITTE-	
	Door Alarm	DA	
B/	Door Buzzer	вV	
	Door Chime #1		
	Door Chime #2	BE	
	Door Holder	DH	
ВС	Doorbell	вр	
	Double Pole Switch	\$9	
Т	Dry Type Transformer	Т	
	Duct Smoke Detector	<u>S</u> ,	
ф	Duplex Receptade	Q O	
	Electric Door Opener	DF DF	
	Electric Door Strike	ES	
	Electrical Panel	-EP	
(S),	Elevator Recall	(s) _E	
EO	End of Line Resistor	EOL	
	Equipment Cabinet		

Electrical Symbols – Continued

ame		Symbol Icon	Color
··· CF	Equipment Control Panel	CP	
· (9)	Exit Fixture #1	*9+	
	Exit Fixture #2	<u> </u>	
··(E)	Fan Hanger Receptacle	Ē	
(F)	Flame Detector	<u> </u>	
··] v (0	Floor Box - Flush With Both Power and Data	JAIQ L	
🗊 F	Floor Duplex Receptacle - Flush Mounted	ធា្	
	Floor Receptacle		
=	Fluorescent Strip		
	Forced Air Unit		
·/(@),	Generator	,(O),	
ф	GFI Duplex Receptacle		
Φ.	Half Switched Duplex Receptacle	0	
Ф.	Hidden Duplex Receptacle	₿	
	Horn Unit Only	H 🐗	
	Horn With Strobe	F	
-(H ₂)	Hydrogen Detector	⟨H₂⟩	
<u></u>	Junction Box	0	
-	Louvers		
	Low Voltage Thermostat	Ū _{ty}	
	Manual Pull Stations	F	
MI	Master Intercom and Directory Unit	MT	
(M)	Meter	1	
(1)	Meter and Socket	(i)	
M	Microphone Outlet - Floor Mounted		
-H(M)	Microphone Outlet - Wall Mounted	-W	
MD	Motion Detector	MD	
(B)	Motor	, F/	
\$ _M	Motor Starter Switch	\$	
·/①/	Motorized Damper	(a)	
	Multi Outlet Assembly		
	On/Off Push Button Station	• •	
Œ	Outdoor Wallpack		
-C	Outlet Controlled by Low Voltage Switch	- <u>C</u>	
\mathcal{H}	Paddle Fan	X	
Ρ	Panic Bar	P	
He	Photo Cell Light	- ₽	
<u>[ZZ</u>	Plywood Backboard		
	Post Indicator Valve	PIV	
PS	Pressure Switch	PS	
•	Push Button	•	
-	Push Button		
#	Quad Duplex Receptade	•	
	Recessed Emergency Fixture		
	Recessed Fixture #1	1 0	

Electrical Symbols – Continued

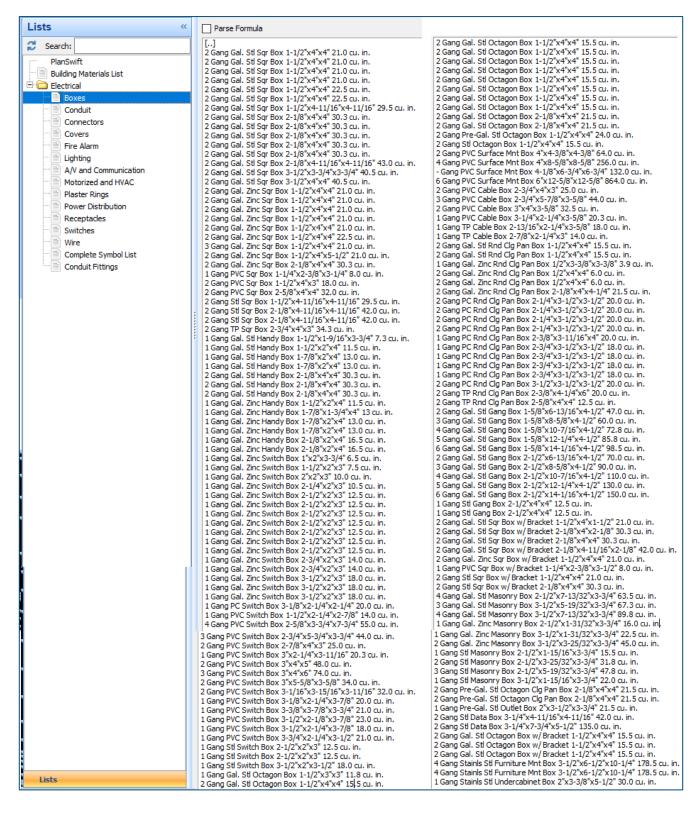
Name		Symbol Icon	Color
	Recessed Fixture #2		
	Recessed Fluorescent		
	Recessed Incandescent	0	
(R)	Relay	8	
CR	Security Card Reader	CR	
····CR W	Security Card Reader - Weatherproof	LE M-	
SC	Security Control Panel	SCP	
····ML	Security Door Alarm and Magnetic Lock	ML	
····DC	Security Door Contact	DO	
	Security Exit Push Button	•	
K	Security Keypad	К	
	Security System	-Hss	
(S) _s		⑤ _{sc}	
-\$	Single Pole Switch	\$	
(S)	Smoke Detector	(S)	
(SV)	Solenoid Valve	9	
(S)	Speaker - Ceiling Mounted	(9)	
	Speaker - Wall Mounted	<u>-</u> ®	
F	Speaker and Strobe	F3	
○<	Speaker Horn	০র্জ	
	Special Receptacle	Q	
-ce	Spotlight - Double Head	œ	
	Spotlight - Single Head	CXI	
	Strobe Unit Only	5 ◀	
0	Surface Mounted Fixture #1	0	
	Surface Mounted Fixture #2		
- #	Surface Mounted Fluorescent	#	
•	Suspended Fixture #1	•	
	Suspended Fixture #2	• •	
	Suspended Incandescent		
-	Telephone Jack	+	
	Telephone Panel	-ITP	
V	Telephone/Data Outlet	1	
+	Television Jack	+<	
Ψ	Thermostat #1	Ţ	
- (T)	Thermostat #2	(T)	
	Three Function Push Button Switch	•••	
ф	Toggle Disconnect Switch		
_Z	Track Light	$\nabla \nabla \nabla$	
	Track Light #2	_ ▽	
UD	Ultrasonic Detector		
····VC	Volume Control	VC	
	Wall Fan		
Ю		Ю	
- Ο	Wall Mounted Fixture #1		

Electrical Symbols – Continued

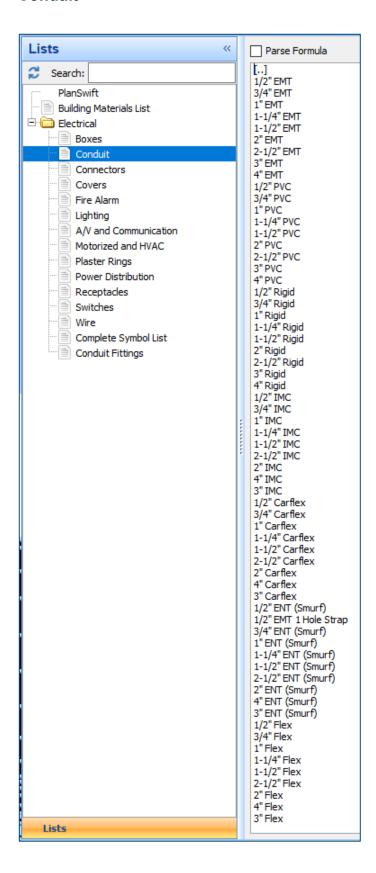
Name		Symbol Icon	Color
	Wall Mounted Fixture #2	4	
0	Wall Mounted Fixture #3	000	
-ф	Wall Mounted Fluorescent	+⊕	
····FS	Water Flow Switch	FS	
(#F)	Water Heater	(MH)	
	Weather Proof GFI Duplex Receptacle	₩P	
\$wp	Weather Proof Switch	\$ _{WP}	

Electrical Starter Pack Lists

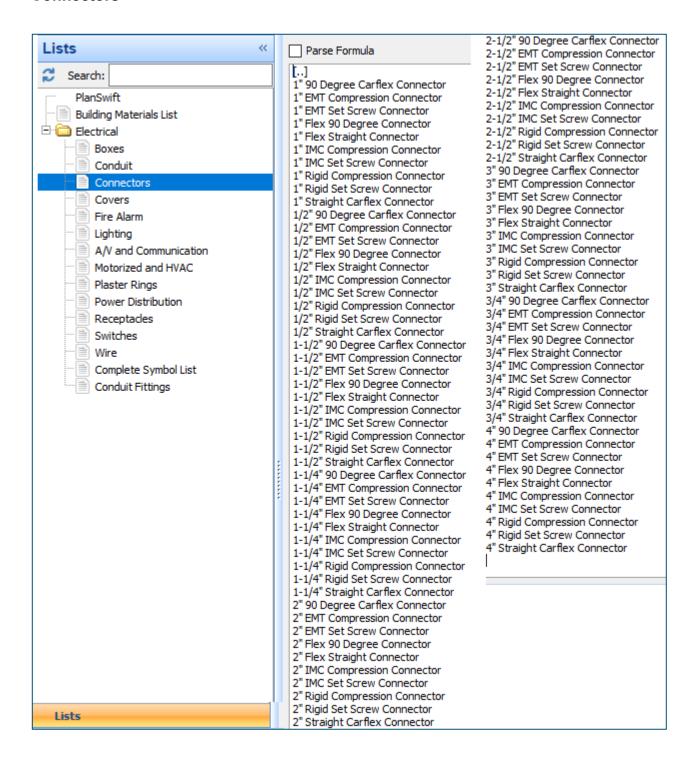
Boxes



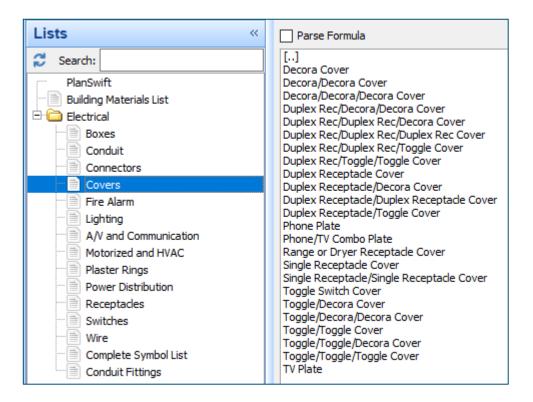
Conduit



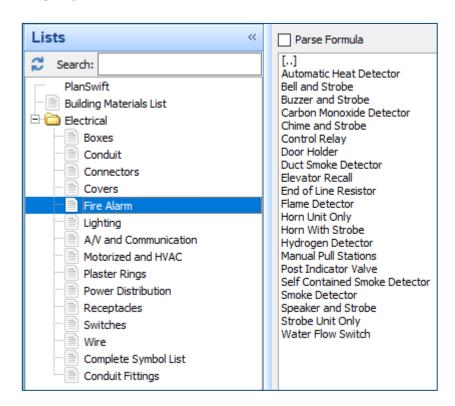
Connectors



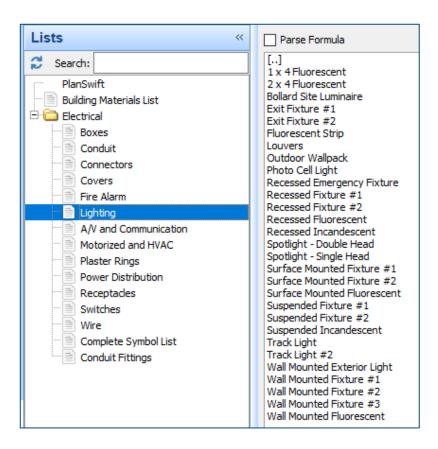
Covers



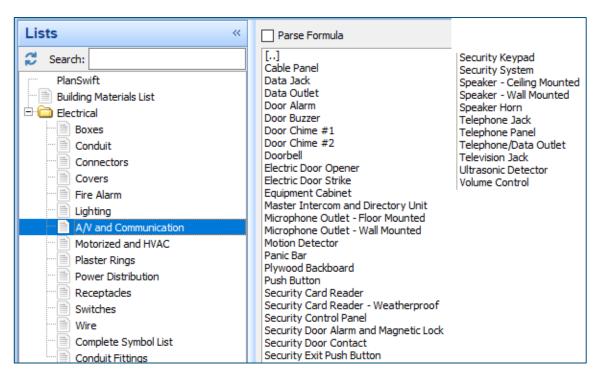
Fire Alarm



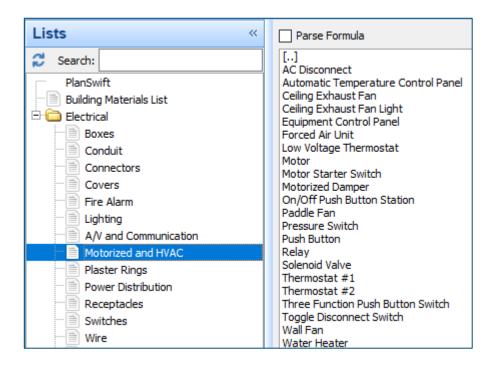
Lighting



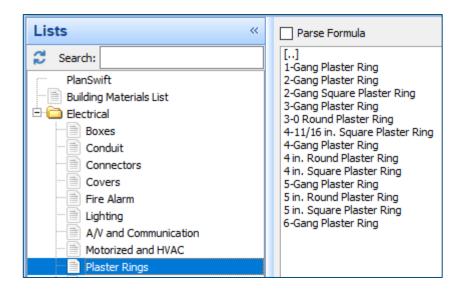
A/V and Communication



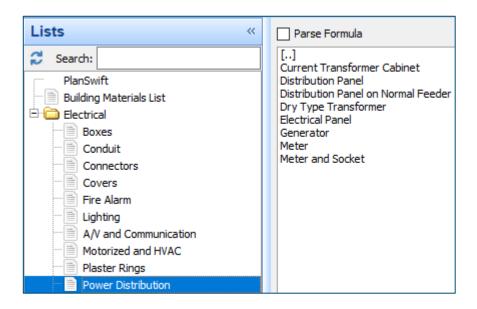
Motorized and HVAC



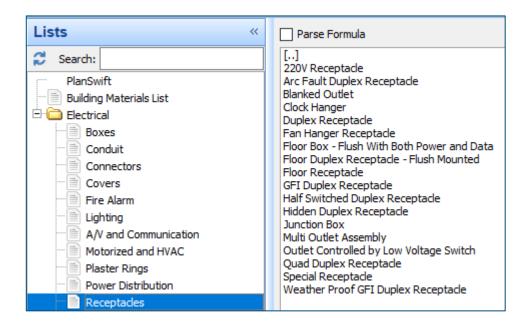
Plaster Rings



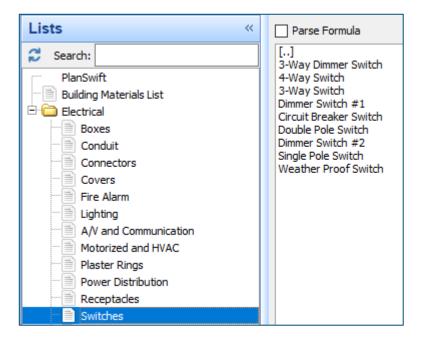
Power Distribution



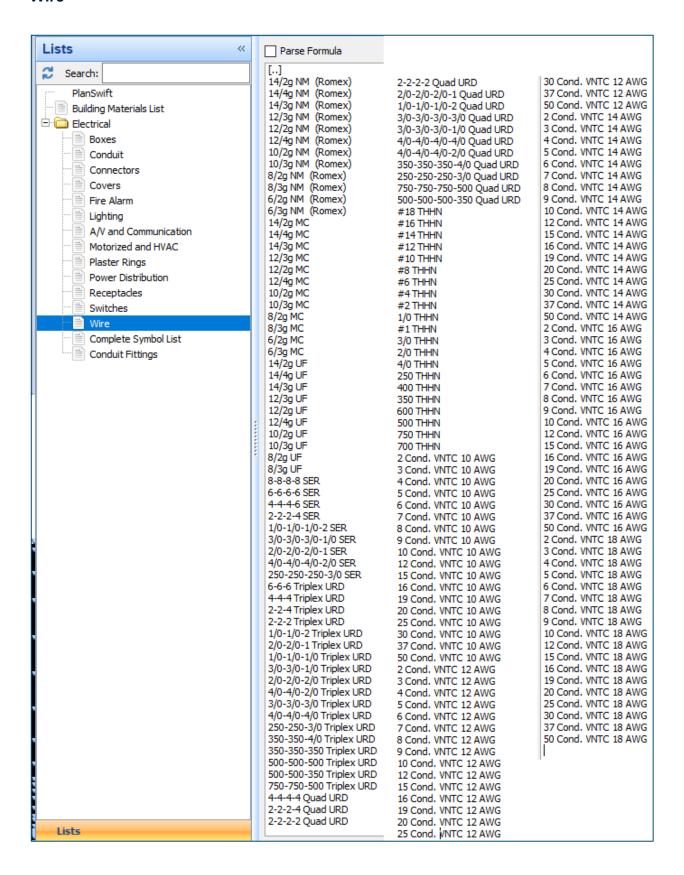
Receptacles



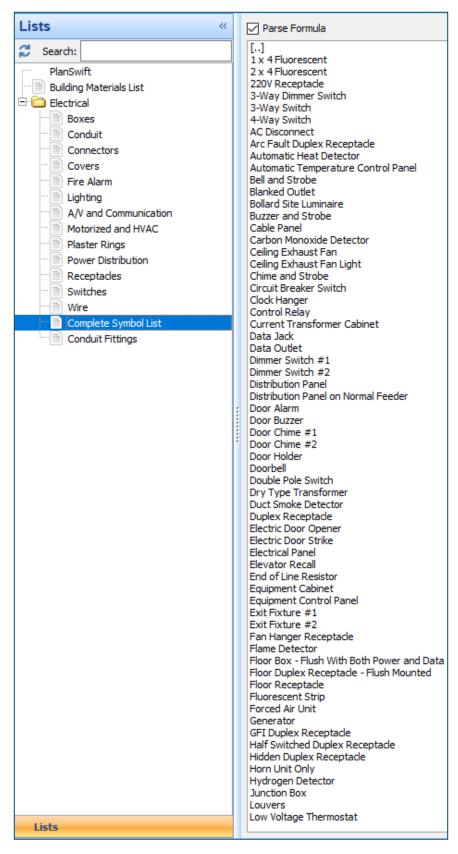
Switches



Wire



Complete Symbol List



Conduit Fittings

