

## TYPES OF SCHEDULES

Schedules are located in the View tab of the Ribbon. You have to choose one of these schedule types:



### **BASIC SCHEDULE: LIST AND QUANTIFY ALL ELEMENTS**

Most common schedule type, this is used to list and quantify all elements. Below, we have a wall schedule sorted by level, listing type and area.

<RP-Wall Schedule>			
A	B	C	D
Type	Base Constraint	Base Offset	Area
FIRST FLOOR			
WOOD WALL	FIRST FLOOR	0	10 m <sup>2</sup>
2ND FLOOR			
GEN INT-124mm	2ND FLOOR	0	1 m <sup>2</sup>



### **SHEET + VIEW LISTS**

Sheet lists are usually placed on the front page, while view list are usually used internally to control the project.

<Sheet List>			
A	B	C	D
Sheet Number	Sheet Name	Current Revision	Date
A1	SITE PLAN	1	2016-08-24
A101	1ST FLOOR PLAN VIEW	1	2016-08-24
A301	CEILING PLAN	1	2016-08-24



## MATERIAL TAKEOFF: CALCULATE MATERIALS

Want to know how many plywood boards area you have in the project? This is the schedule you are looking for. Quantities are calculated regardless if the material is part of the wall, roof, ceiling or column. This can be used to estimate cost.

<Material Takeoff>			
A	B	C	D
Material: Name	Area	Cost	Total Price
RP-Gypsum	10 m <sup>2</sup>	5.00	49.85
RP-Metal Stud	10 m <sup>2</sup>	10.00	100.50



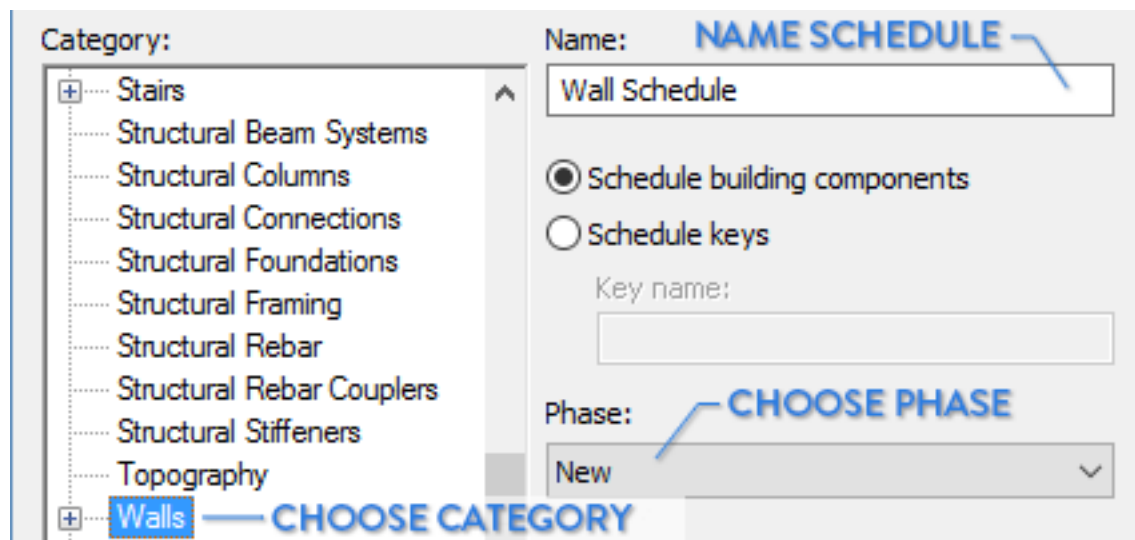
## NOTE BLOCK: ORGANIZE PLAN NOTES

This schedule type is used to list 2D generic annotation families. The main use is to produce plan notes.

<Note Block>	
A	B
Number	Note
1	1/2" WOOD PLANK BEHIND COUNTER
2	LOW HANGING WHEEL

# CREATE A BASIC SCHEDULE

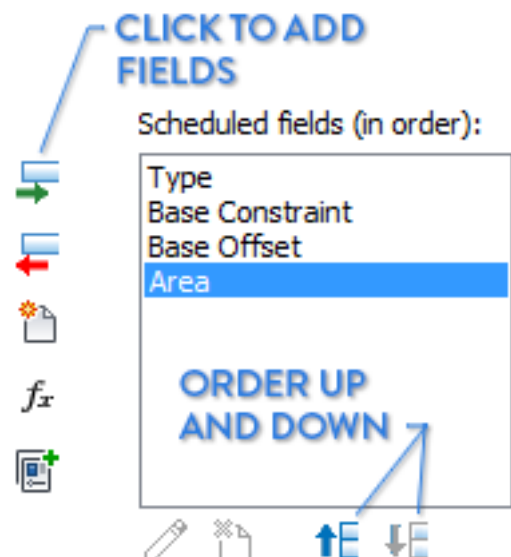
When creating a new schedule, you will be asked to choose a model category. Also select the phase and name your new schedule.



## FIELDS

Fields are parameters that you select to be part of your schedule. Depending on the Category you chose, different parameters will be available.

The **top** field of this menu will appear on the **left** of the schedule, the **bottom** one will appear on the **right**.



# 19 TIPS TO BECOME A SCHEDULE MASTER

## 1. USE FILTERS TO EXCLUDE SPECIFIC ELEMENTS

Go to **Filters** menu to exclude specific elements from the schedule. For example, if you want a schedule with walls that are at least 1000mm long, add a “**is greater than or equal**” Length filter. As you see in the resulting schedule, walls below 1000mm are hidden.

Fields

Filter

Sorting/Grouping

Formatting

Appearance

Filter by: 

Length

is greater than or equal

1000

Type	Base Constraint	Base Offset	Area	Length
Curtain Wall Ext	FIRST FLOOR	0	5 m²	1034
Curtain Wall Ext	FIRST FLOOR	0	6 m²	1061
WOOD WALL	FIRST FLOOR	0	10 m²	7550

## 2. SORT AND CLASSIFY YOUR SCHEDULE

Go to **Sorting/Grouping** menu to select a way to sort the schedule. For example, if we **Sort** the wall schedule by **Type**, walls will be classified by type, in alphabetical order.

Sort by: 

Type

☒ Ascending ☐ Descending

TYPE	BASE LEVEL	BASE OFFSET	AREA
Curtain Wall Ext	FIRST FLOOR		40 m²
GEN INT-124mm	FIRST FLOOR		49 m²
RP-Brick Wall	FIRST FLOOR	0	192 m²

### 3. UNCHECK *ITEMIZE EVERY INSTANCE* TO GROUP ITEMS

By default, every elements are visible in a schedule. That means if you create a wall schedule, every single wall will be shown individually.

Most of the time, you want to group these walls. Go to **Sorting/Grouping** menu and uncheck **Itemize every instance**. Walls will be grouped together by the **Sort** category. In the example below, walls are grouped by **Type**.

Sort by: Type Ascending

<input checked="" type="checkbox"/> Itemize every instance	ALL WALLS APPEAR IN THE SCHEDULE			
Type	Base Constraint	Base Offset	Area	Length
Curtain Wall Ext	FIRST FLOOR	0	5 m <sup>2</sup>	1136
Curtain Wall Ext	FIRST FLOOR	0	5 m <sup>2</sup>	1034
Curtain Wall Ext	FIRST FLOOR	0	6 m <sup>2</sup>	1061
GEN INT-124mm	FIRST FLOOR	-1200	12 m <sup>2</sup>	5300
GEN INT-124mm	FIRST FLOOR	1427	13 m <sup>2</sup>	7550
WOOD WALL	FIRST FLOOR	0	10 m <sup>2</sup>	7550

<input type="checkbox"/> Itemize every instance	WALLS ARE GROUPED BY TYPE			
Type	Base Constraint	Base Offset	Area	Length
Curtain Wall Ext	FIRST FLOOR			
GEN INT-124mm	FIRST FLOOR			
WOOD WALL	FIRST FLOOR	0	10 m <sup>2</sup>	7550

## 4. ADD HEADER AND FOOTER

In Sorting/Grouping menu, activate Header to add a **Title** above each category. Footers has 3 options you can choose: **Title**, **Counts** (number of elements) and **Totals** (for each field).

Schedule Properties

Fields Filter Sorting/Grouping Formatting Appearance

Sort by: Type ☒ Ascending

☒ Header ☒ Footer: Title, count, and totals

Then by: (none) Title, count, and totals

☐ Header ☐ Footer: Title and totals

Count and totals

Totals only

Type	Base Constraint	Base Offset	Area	Length
GEN INT-124mm <b>HEADER</b>				
GEN INT-124mm	FIRST FLOOR	-1200	12 m <sup>2</sup>	5300
GEN INT-124mm	FIRST FLOOR	1427	13 m <sup>2</sup>	7550
GEN INT-124mm	FIRST FLOOR	1427	18 m <sup>2</sup>	10061
GEN INT-124mm	FIRST FLOOR	1427	5 m <sup>2</sup>	3264
GEN INT-124mm: 4 <b>FOOTER</b>			49 m <sup>2</sup>	

**TITLE** **COUNT** **TOTAL**

## 5. GO TO FORMATTING MENU TO ACTIVATE TOTALS

To calculate total for a field, make sure Calculate Totals is activated in the **Formatting** properties of a specific field. In the example below, we activate totals for area but not for length.

You also need to make sure totals are activated in the **footer**, else they won't show up.

Fields:

Type  
Base Constraint  
Base Offset  
Area  
Length

Field formatting:

☐ Hidden field

☒ Show conditional format on sheets

Calculate totals **TOTALS CALCULATED**

Field Format...

Conditional Format...

Fields:

Type  
Base Constraint  
Base Offset  
Area  
Length

Field formatting:

☐ Hidden field

☒ Show conditional format on sheets

Standard **TOTALS NOT CALCULATED**

Field Format...

Conditional Format...

Type	Base Constraint	Base Offset	Area	Length
GEN INT-124mm				
GEN INT-124mm	FIRST FLOOR	-1200	12 m <sup>2</sup>	5300
GEN INT-124mm	FIRST FLOOR	1427	5 m <sup>2</sup>	3264
GEN INT-124mm: 4			49 m <sup>2</sup>	

TOTAL

← NO TOTAL

## 6. TOTALS FOR GROUPED ITEMS DON'T NEED FOOTER

If you don't use **Itemize Every Instance**, elements are grouped and don't need a footer to get totals. If totals are deactivated for a field (like the length field below), the schedule field will be blank. However, walls with a single instance in the project will still show the value of that instance, like for the **RP- Funky Wall** and **Wood Wall** type below.

<OK SCHEDULE>			
A	B	C	D
TYPE	Count	AREA	Length
Curtain Wall Ext	12	44 m <sup>2</sup>	
GEN INT-124mm	4	49 m <sup>2</sup>	
RP- Aluminium Wall	3	36 m <sup>2</sup>	
RP-Funky Wall	1	3 m <sup>2</sup>	3200
WOOD WALL	1	10 m <sup>2</sup>	7550

AREA TOTALS ARE  
DIRECTLY ON THE  
SCHEDULE FOR  
EACH TYPE

LENGTH TOTALS  
NOT CALCULATED

## 7. USE GRAND TOTALS

What if you want to know the total area of every single wall in the project? Go to **Sorting/Grouping** and activate **Grand Totals**.

☒ Grand totals:


Title, count, and totals

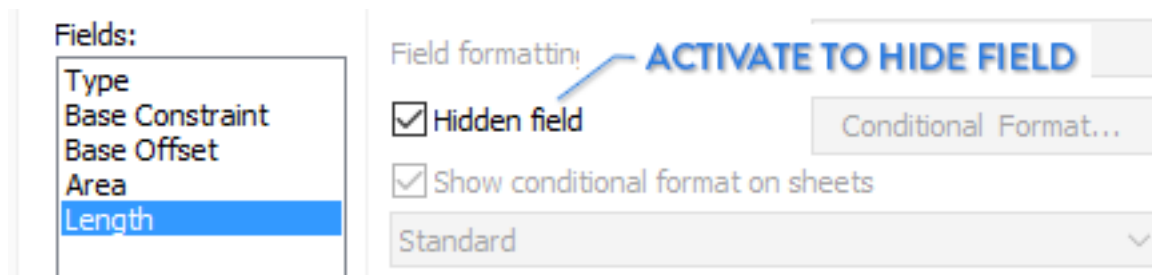
A	B	C
TYPE	Count	AREA
Curtain Wall Ext	12	44 m <sup>2</sup>
WOOD WALL	1	10 m <sup>2</sup>
GRAND TOTAL: 27	27	354 m <sup>2</sup>

TOTAL AREA VALUE FOR  
EVERY WALL IN THE PROJECT



## 8. HIDE FIELDS YOU DON'T WANT TO SEE

Sometimes, a field can be required to filter or calculate value, but don't need to be visible in the actual schedule. Go to **Formatting** and select Hidden Field. You can also select a column and use the  Hide tool in the Ribbon.



Fields:

- Type
- Base Constraint
- Base Offset
- Area
- Length

Field formatting:

**ACTIVATE TO HIDE FIELD**

☒ Hidden field

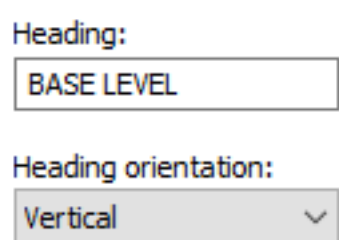
☒ Show conditional format on sheets

Conditional Format...

Standard

## 9. USE VERTICAL HEADER FOR LONG TITLES

Long headers names can make your schedule very wide. Making them vertical will make your schedule thinner. Go to **Formatting** and set heading orientation to Vertical for each required field.




RP-Wall Schedule			
TYPE	BASE LEVEL	BASE OFFSET	AREA
Curtain Wall Ext	FIRST FLOOR	0	5 m <sup>2</sup>

# 10. GROUP HEADERS TO ORGANIZE YOUR SCHEDULE

Select many field headers by using Shift or dragging your cursor. Then click the **Group** button in the contextual tab. Add a name to the new subcategory header.

C	D
BASE OFFSET	AREA


  
Group


C	D
YEAH !!	
BASE OFFSET	AREA

# 11. HIGHLIGHT ELEMENT IN MODEL

Sometimes, you see an element in a schedule, yet you have no idea where it is located in the model. Click **Highlight in Model** and a view will open with the element appearing in blue.

RP-Brick Wall	FIRST FLOOR	0	77 m²
RP-Brick Wall	FIRST FLOOR	0	90 m²
RP-Brick Wall	FIRST FLOOR	0	24 m²

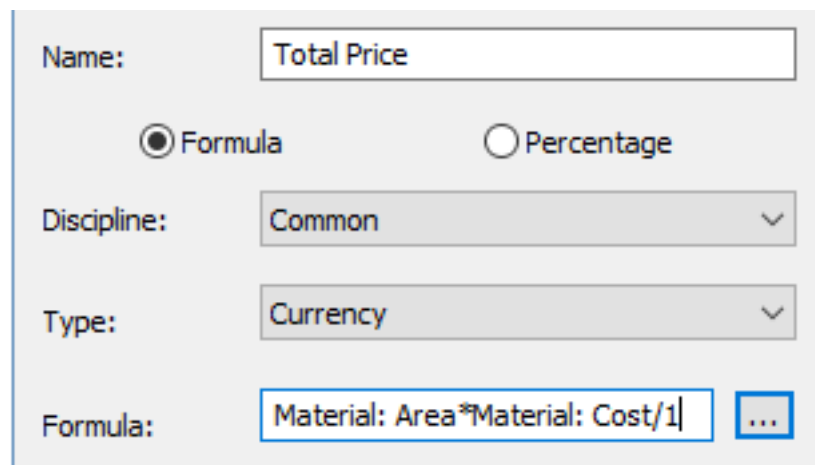
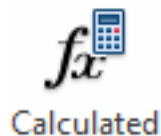
  
Highlight in Model



ELEMENT BECOMES SELECTED IN MODEL

## 12. USE CALCULATED PARAMETER TO GET PRICE

When creating a Material Takeoff schedule type, use the Calculated Parameter to calculate values together. For example, multiply the **Material Cost** with the **Material Area** to get the total price for each material. Click **Calculated** in the ribbon, select **Currency** and set the **Name**. Then select the two field in the formula and put **\*** between them. Add a **/1** at the end of the formula to fix units. In this example we used price, but this tool can be used to calculate anything or create percentages.



Name:

☒ Formula ☐ Percentage

Discipline:

Type:

Formula:

## 13. PLACE SCHEDULES ON SHEET TO PRINT THEM

You can't print a schedule on the schedule view. It needs to be placed on a sheet first. Use print screen or Windows snipping tool if you need to print the schedule directly from the view.

## 14. SET TITLE VISIBILITY AND SELECT FONTS

Do you want Titles and Headers to be visible? Go to **Appearance** menu to deactivate them if required. Also select fonts to be used in schedule. The **Schedule Default** font is **Arial**, so if you want another font, select a text style from your project.

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☒ Show Title

☒ Show Headers

Title text: 

Schedule Default ▾

Header text: 


Schedule Default ▾

Body text: 

Schedule Default ▾

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## 15. DESIGN SCHEDULE LOOK WITH GRIDLINES

What kind of schedule look do you want? Free-spirit or accountant? Use gridlines in **Appearance** menu to select that. Want to remove grids for a specific column? Use the  **Borders** tool in the ribbon.

Grid lines: ☐

Thin Lines ▾

Outline: ☐

Thin Lines ▾

### FREE-SPIRIT

TYPE	AREA
Curtain Wall Ext	44 m²
GEN INT-1 24mm	49 m²
WOOD WALL	10 m²

Grid lines: ☒

Thin Lines ▾

Outline: ☒

Wide Lines ▾

### ACCOUNTANT

TYPE	AREA
Curtain Wall Ext	44 m²
GEN INT-1 24mm	49 m²
WOOD WALL	10 m²

## 16. MODIFY SCHEDULE APPEARANCE ON SHEET

A schedule placed on a sheet looks completely different from what you see inside the view. The “Sheet Look” is what your schedule going to look like once printed. So make sure you verify schedules inside sheets when designing appearance.


<OK SCHEDULE>	
A	B
TYPE	AREA
Curtain Wall Ext	44 m <sup>2</sup>
GEN INT-124mm	49 m <sup>2</sup>
WOOD WALL	10 m <sup>2</sup>

VIEW LOOK

OK SCHEDULE	
TYPE	AREA
Curtain Wall Ext	44 m <sup>2</sup>
GEN INT-1 24mm	49 m <sup>2</sup>
WOOD WALL	10 m <sup>2</sup>

SHEET LOOK

## 17. ADJUST COLUMNS WIDTH WITH LITTLE ARROWS

When inside a sheet, click on a schedule and move the little arrows to modify the width of each column. If you want a precise value for the column width, use  **Resize** button in the Ribbon.

TYPE	AREA
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MOVE ARROW TO ADJUST COLUMN WIDTH

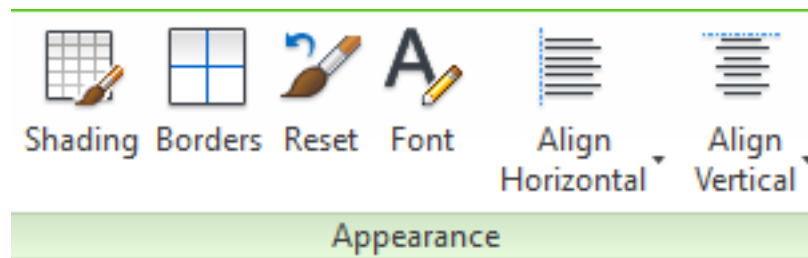
## 18. DOUBLE-CLICK ON SCHEDULE TO MODIFY IT

You can't modify a schedule directly on a sheet. Double-click the schedule to enter the schedule view, where you have access to all options.

## 19. USE THE RIBBON TO ADJUST COLUMNS STYLE

Use the ribbon to make adjustments to the visual style of each column. For example, in the schedule below we changed the Area column by using a centered horizontal alignment, a top vertical alignment, changed the font to be bold and underlined and used a pink shading. All these awkward changes can be set back by using **Reset** button.

You can't change the look of rows, this is for columns only.



OK SCHEDULE			
TYPE	Count	AREA	Length
Curtain Wall Ext	12	<u>44 m<sup>2</sup></u>	
GEN INT-124mm	4	<u>49 m<sup>2</sup></u>	
WOOD WALL	1	<u>10 m<sup>2</sup></u>	7550
GRAND TOTAL: 27	27	354 m <sup>2</sup>	