

Autodesk® Navisworks® 2014

Quantification Release Notes



Using the Excel Catalog Template Tool to import catalog data into Navisworks Quantification

May 2014

Please send feedback on this guide to: navisworks.productmanager@autodesk.com

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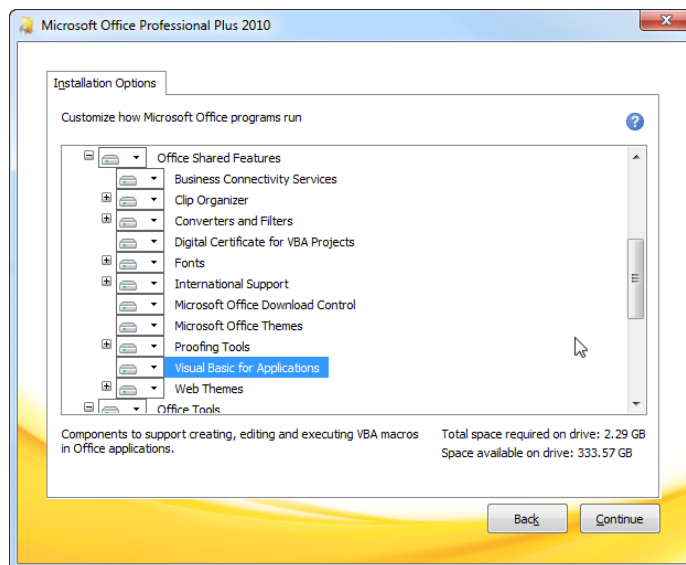
Introduction

The Excel Catalog Template tool allows you to transfer existing catalog data, like Items and Resources, from an Excel spreadsheet into a Navisworks Quantification catalog. After importing the template into Navisworks, you can then recreate the relationship between your Items and Resources.

Before you begin

Technical Requirements

- Ensure you have Excel 2010 or 2012 installed
- Ensure you have Visual Basic for Applications (VBA) installed as part of your Office Installation. To install VBA:
 1. Go to Start ► Control Panel ► Programs ► Programs and Features
 2. Select your version of Microsoft Office
 3. On the toolbar, click Change
 4. Check Add or Remove Features, click Next
 5. Scroll down to Office Shared Features
 6. From the Visual Basic for Applications drop-down, select Run from My Computer



7. Click Continue, then Finish.

Other requirements

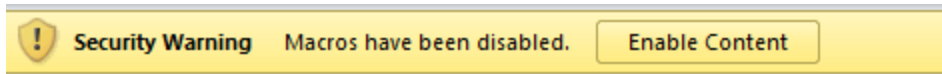
When using the Excel template tool, note the following:

- Do not change or delete the data in the Lookup worksheet.
- Do not use double quotation marks in the WBS and RBS columns.

Using the Excel Catalog Template

Step 1: Add data to the Excel Catalog Template

1. Download and Save the Catalog Template to your local machine.
2. Open the Catalog Template in Excel
3. In the Excel toolbar, click the Add-Ins tab
4. At the Security Warning, click Enable Content to enable Macros.

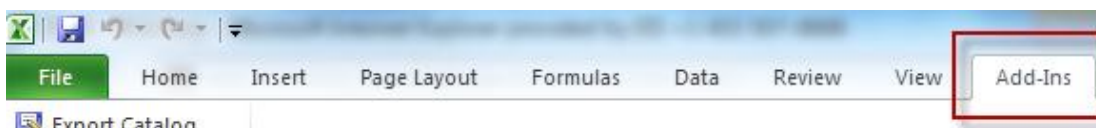


5. Copy the data you want to bring into the Catalog Template. This might exist in another Excel Spreadsheet or external database.
6. In the Data Area of the Catalog Template, select the column you want to paste your data into and click Paste ► Paste Special and in the Paste section, select Values.

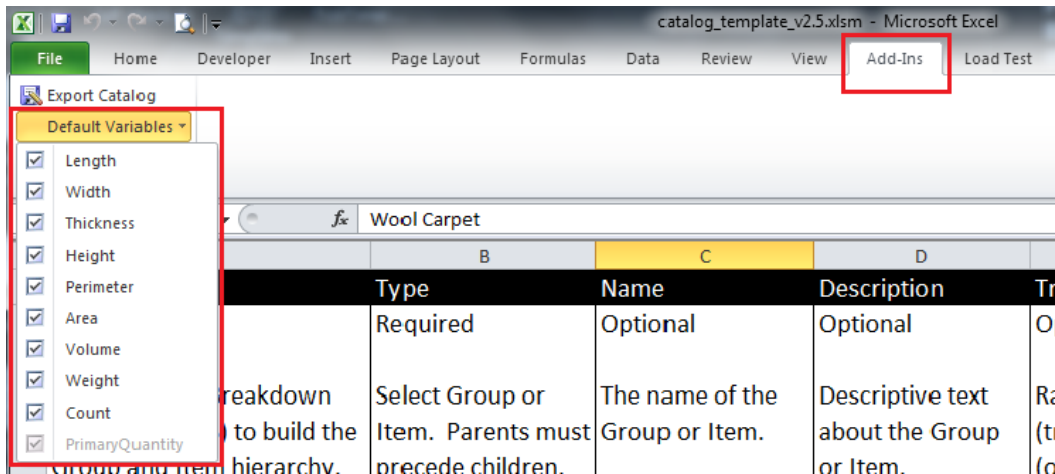
Note: Ensure you follow the instructions in the Column Description for each column of data:

1	A	B	C	D	E	F	G
WBS	Type	Name	Description	Transparency	Color	Primary Quantity Units	
Required	Required	Optional	Optional	Optional	Optional	Optional.	
Use the Work Breakdown Structure (WBS) to build the Group and Item hierarchy. NOTE: Both the '.' character and the '\' character are the separators for the different hierarchy levels.	Select Group or Item. Parents must precede children. Items cannot be parents: only Groups can be parents.	The name of the Group or Item.	Descriptive text about the Group or Item.	Ranges from 0 (transparent) to 1 (opaque). Defaults to 0.3 if not specified.	Specify an RGB. Defaults to a random color if unspecified.	Defaults to blank if unspecified.	
				Only applies to Items.	Only applies to Items.	Only applies to Items.	
REMINDER: Do not delete or rename columns - the spreadsheet will not import. It is OK to delete the sample data below.							
4	WBS	Type	Name	Description	Transparency	Color	Primary Quantity Units
5		Group	Interiors	Non-structural interior.			
6	c.20	Group	Stairs				
7	c.20.10	Group	Stair Construction				
8	c.20.10.1	Item	6" Max Riser		0.3	254, 255, 127	ea
9	c.20.10.2	Item	7" Max Riser		0.3	192, 158, 180	ea
10	c.20.20	Group	Stair Finishes				
11	c.20.20.1	Item	Olefin Carpet	High traffic area.	0.4	84, 85, 85	yd ²
12	c.20.20.2	Item	Wool Carpet	Medium traffic area.	0.4	42, 170, 170	yd ²
13	c.30	Group	Interior Construction				
14	c.30.1	Item	80"X33" door	Interior folding door.	0.5	112, 48, 160	in ²
15	c.30.2	Item	80"X36" door	Interior folding door.	0.5	170, 170, 42	in ²
16							

7. On the Excel main toolbar, click the Add-Ins tab.

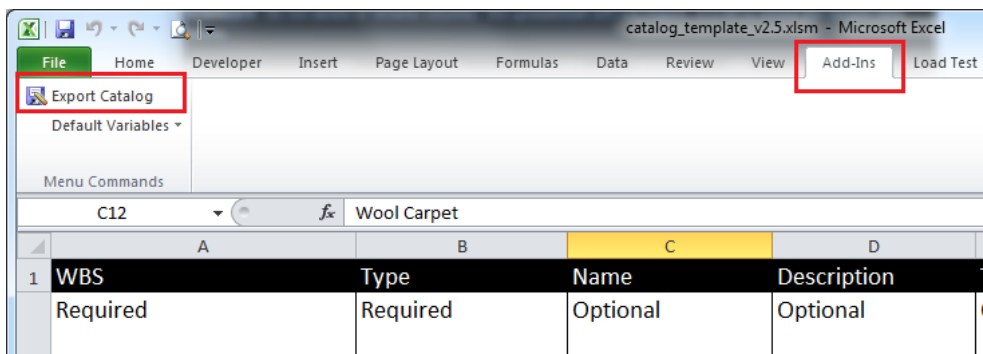


- Click the Default Variables drop down and select which variables you want to carry over into the catalog.

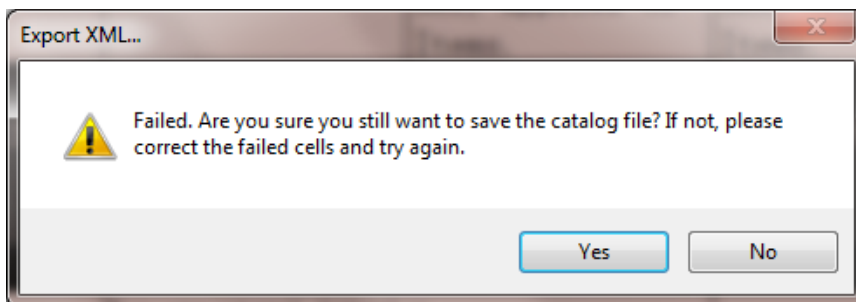


Note: Checked variables will retain the default model formula, for example, Length = ModelLength. The formula can be updated after importing into Navisworks.

- On the Add-Ins tab, click Export Catalog, type a name and Save the .xml file.



Note: If there are any errors in your template values you may receive the error message below:



- Select Yes or No as described below:

- Click **Yes**. The Items or Resources that are correctly coded are exported successfully. Any Items and Resources that relate to workbook cells with incorrectly coded information will *not* be exported. These cells are automatically highlighted in yellow in the workbook, and will contain comments explaining the nature of the error. You should then either correct the errors, or Save the file in its current state and proceed to Step 2 below.
- Click **No**. The Export catalog process is cancelled. Any Items and Resources that relate to workbook cells with incorrectly coded information will not be exported. These cells are automatically highlighted in yellow, and will contain comments explaining the nature of the error. You should correct the errors before proceeding to Step 2.

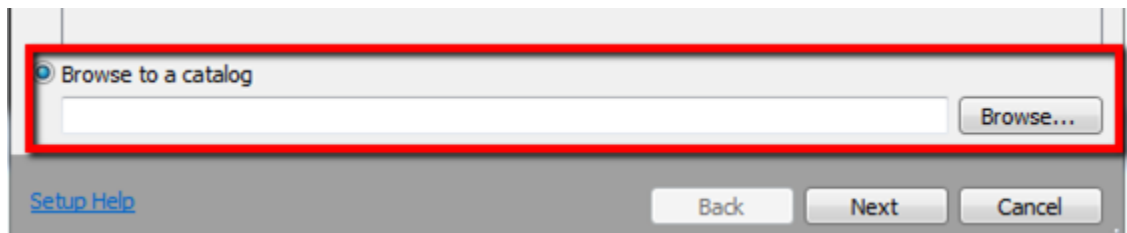
Step 2: Import the Excel Catalog Template into Navisworks

There are two ways to import the Excel Catalog Template into Navisworks Quantification, either:

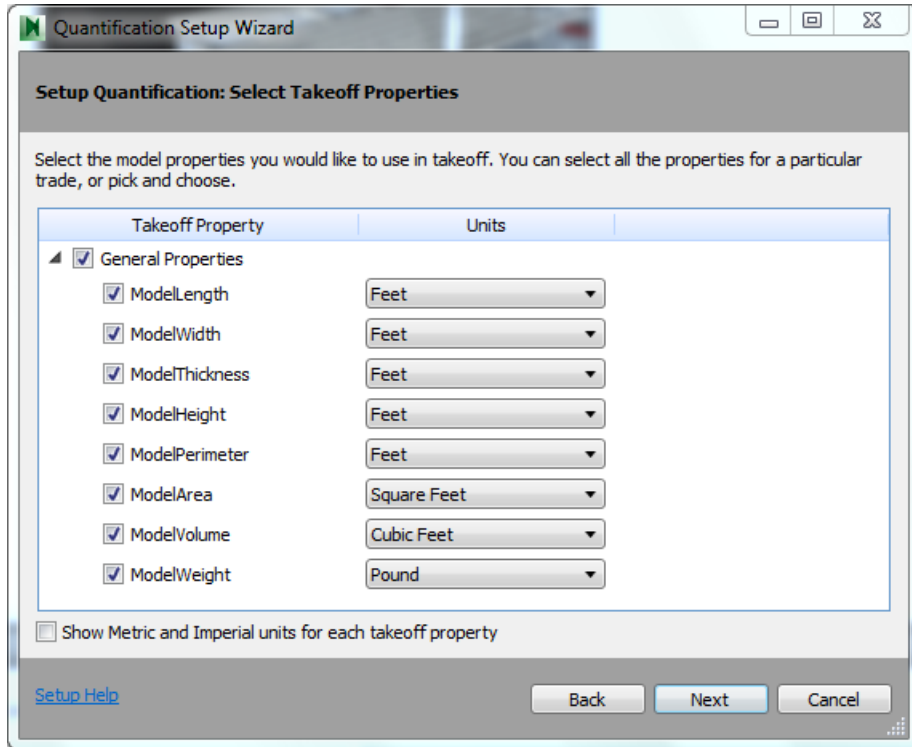
- [Import during Project Setup process in Quantification \(recommended\)](#)
- [Import Catalog in Quantification Workbook](#)

a. Import during project setup (recommended)

1. Open the file you want to use for Quantification in Navisworks.
2. On the Navisworks toolbar, click Project Setup.
3. In the Quantification Setup Wizard, on the Select Catalog dialog, select Browse to a Catalog.



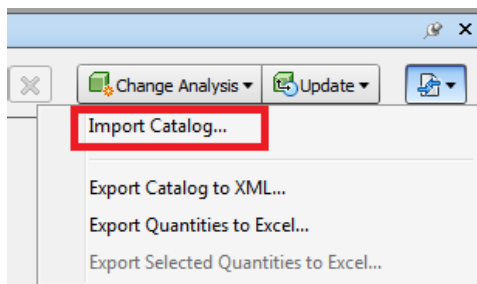
4. Select the .xml file you just saved and exported from the Excel Catalog Template tool (the .xml file you saved in the section above) and click Next.
5. Select the measurement units you want to use: Imperial, Metric or Variable and click Next.
6. In the Select Takeoff Properties dialog, select the takeoff variables you want to use. Ensure the checked variables correspond to the Default Variables you selected in the Excel Template tool (in the [section](#) above).



7. Click Next and Finish to complete Project Setup.
8. The catalog Items and Resources are imported into Navisworks Quantification and visible in the Quantification workbook. You can now open the Item and Resource catalogs and update the catalog data if necessary.

b. Import Catalog in Quantification Workbook

1. In Navisworks Quantification, open your project. The project should contain the same project variables and properties as the .xml file you just created using the Excel Catalog Template.
2. On the Quantification toolbar, click Import Catalog and Browse to the .xml file you just created.



Using the Excel Catalog Template with QTO

The Excel Catalog Template can also be used with Autodesk Quantity Takeoff. You should save the Autodesk Quantity Takeoff catalog as a CSV file before you begin, then follow the procedure outlined in steps 1-5 of the section [Add data to the Excel Catalog Template](#). At step 6, continue as described below:

6.1 Copy the whole column values from the CSV file, and paste the values into the corresponding column in the Excel Catalog Template as show below:

Columns in QTO CSV catalog	Columns in Excel Catalog Template
ConcatWBS	WBS
Type	Type
Item	Name
Remarks	Description
Qty1_UOM or Qty2_UOM	Primary Quantity Units

6.2 Manually copy the Group Name from the Group Column in the CSV file and paste the value of it into the Name column in the Excel Catalog Template for every group, or keep the group name empty and update it after they are imported into Navisworks.

6.3 Manually input a color value in the Excel template, or leave it blank to randomly generate color for them. You can also update the color after the template is imported into Navisworks.

Note: Components under assembly in Autodesk Quantity takeoff are not supported with this tool.

6.4 Continue from [step 7](#) to complete the template setup and then import the .xml file into Navisworks.