



## EXCEL EXPORT-IMPORT 2015-2020

USER GUIDE 20.1.0.0 VERSION

Transfer data from Revit to Excel and vice versa

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## INTRODUCTION

### Description

This Revit add-in (**Excel Export-Import 2015-2020**) allows you facilitate the management of your data in your digital models. First, you need to export your schedules to an Excel file via the add-in interface. Then, this will allow you to modify your data directly inside Excel. Once your information has been modified, simply import back your Excel file via the add-in interface and your schedules will automatically update with the new data. With this tool, you can simplify the data management process by delegating tasks related to digital model information to all team members who do not have a Revit software license or who have limited knowledge of the software.

In version 20.1.0.0, a new feature has been added to allow you to export to an Excel file, but for viewing purposes only.

### Benefits

- Simplified data management process
- Improved segmentation of tasks
- Inclusion of all team members without knowledge of BIM software at a lower cost

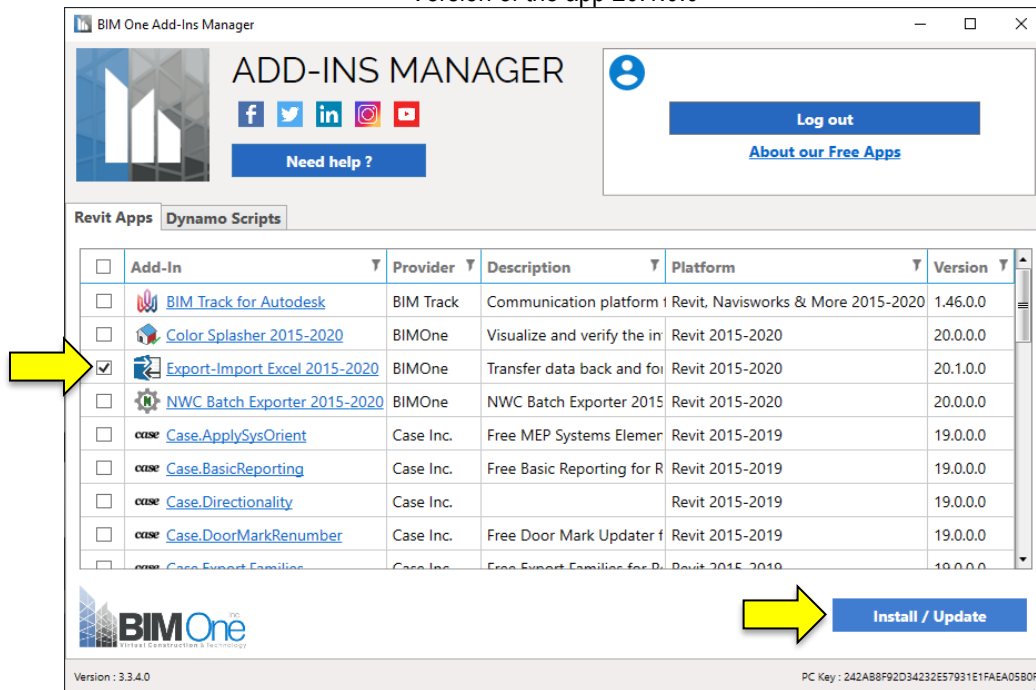
## INSTALLATION

Refer to the [BIM One Add-in Manager User Guide](#) for the process of installing or updating Revit's add-ins.

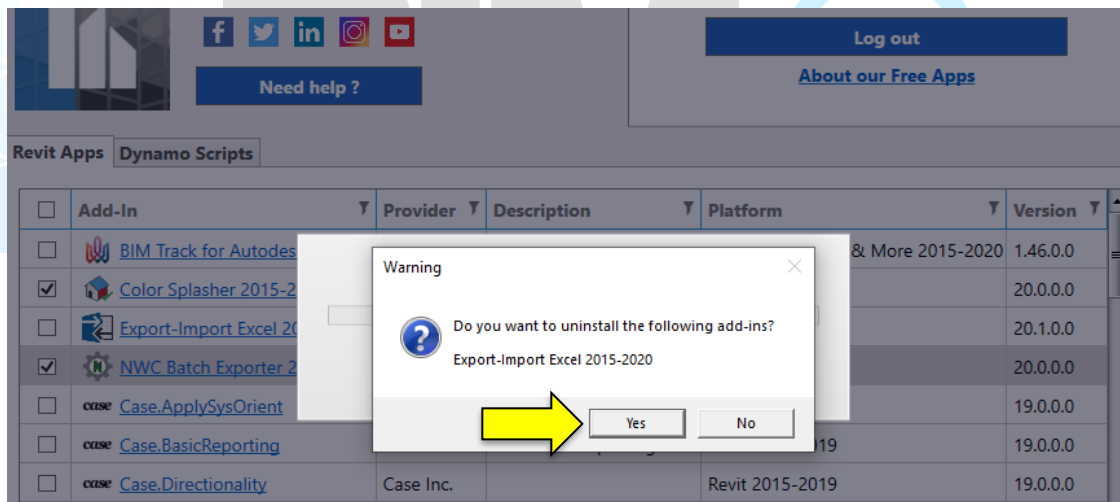
## UNINSTALLING

### With the BIM One Add-Ins Manager software

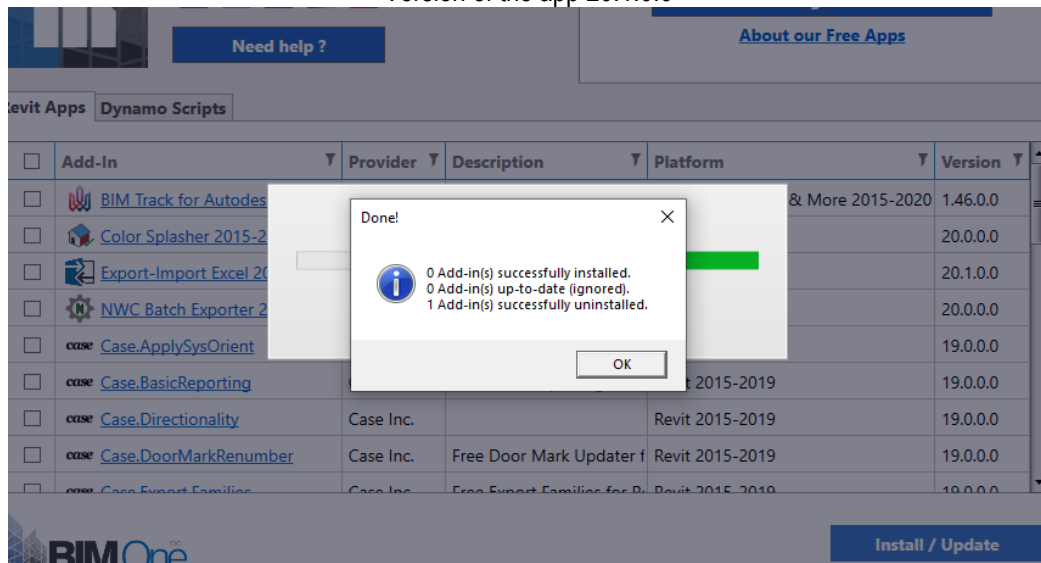
If you've installed the add-in with the BIM One Add-Ins Manager software, you can easily uninstall it again using this software. To proceed, you need to open the software and enter your login information. Once you have logged into your account, uncheck the boxes of the Revit add-in you want to uninstall and you simply click the "Install / Update" button.



When the confirmation warning appears, you click “Yes” to continue uninstalling the Revit add-in(s).



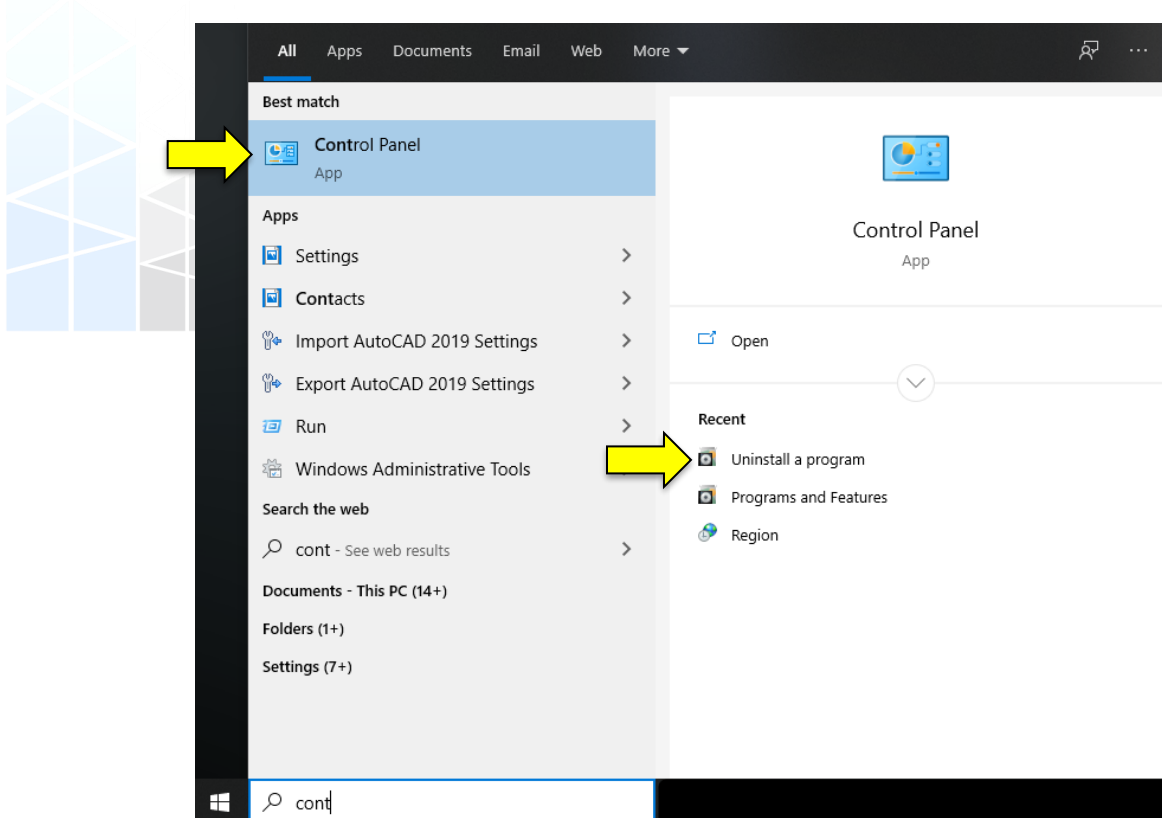
Finally, you will have a message that will confirm that the Revit add-in was successfully uninstalled.



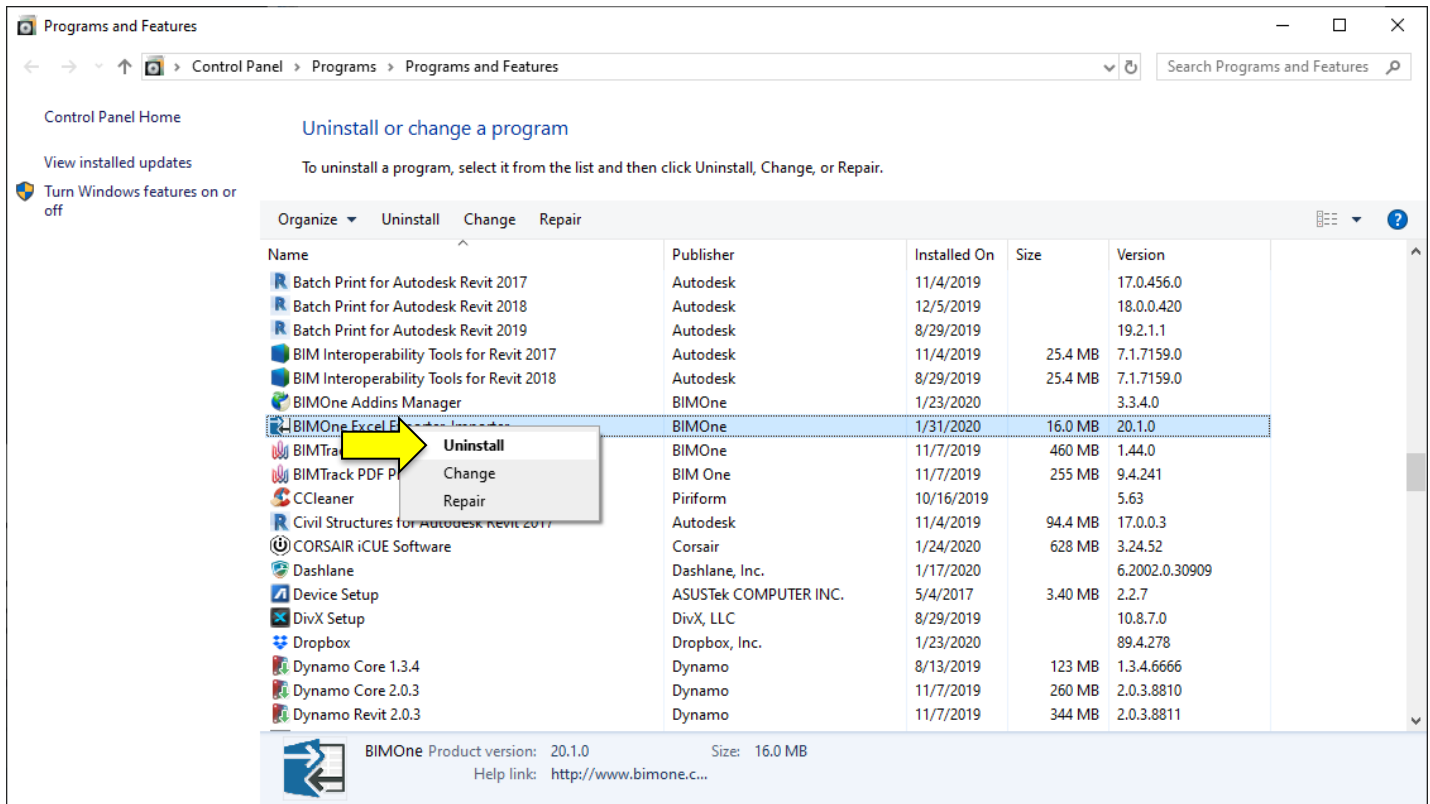
## Without the BIM One Add-Ins Manager software

To manually uninstall a Revit add-in, you will need to go through the Windows uninstall tool.

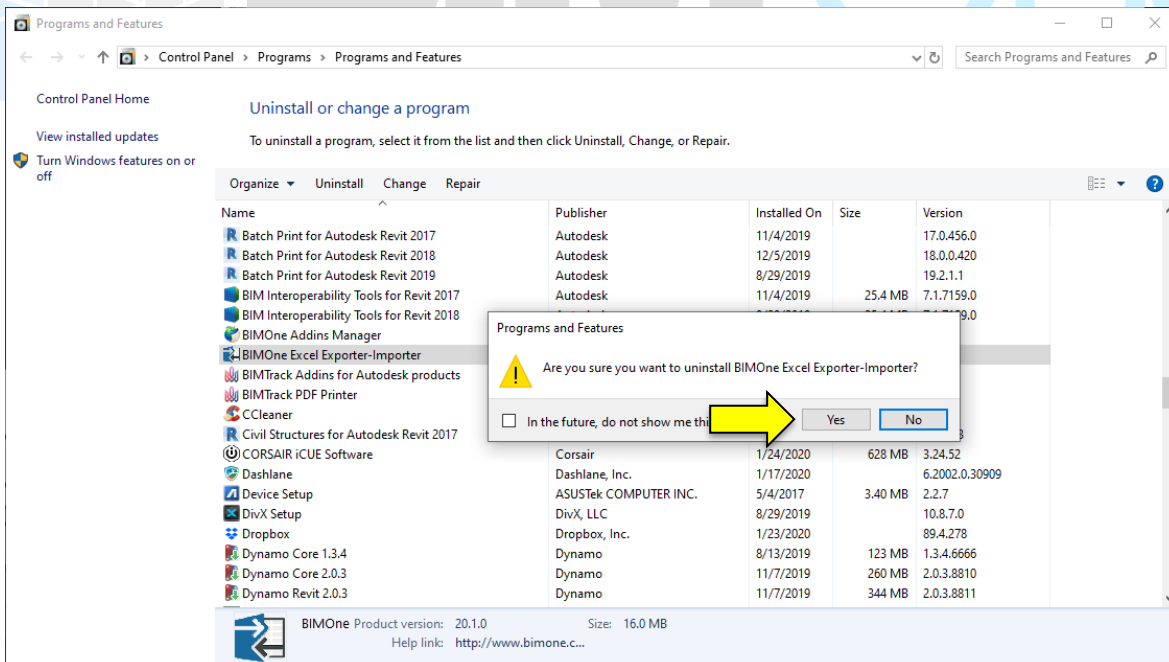
With Windows 10, you can enter “Control Panel” in the quick search area and then select the “Uninstall a program” function directly from the option in the right section. If you don’t see that option, select the “Programs and Features” function in the control panel.



In the list of all software installed on your computer, search for the add-in to uninstall. Once you've found it, right click on it and select "Uninstall".

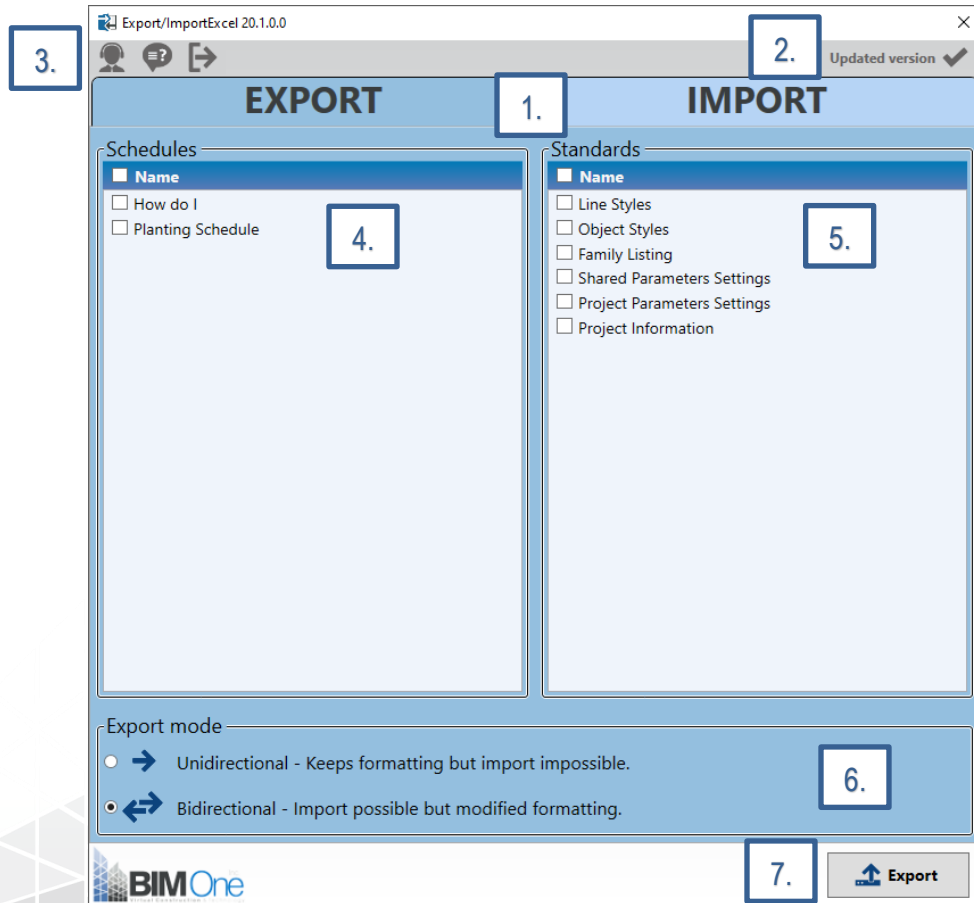


When the confirmation message appears, click "Yes" to continue uninstalling the Revit add-in.



# USER INTERFACE

## Exportation

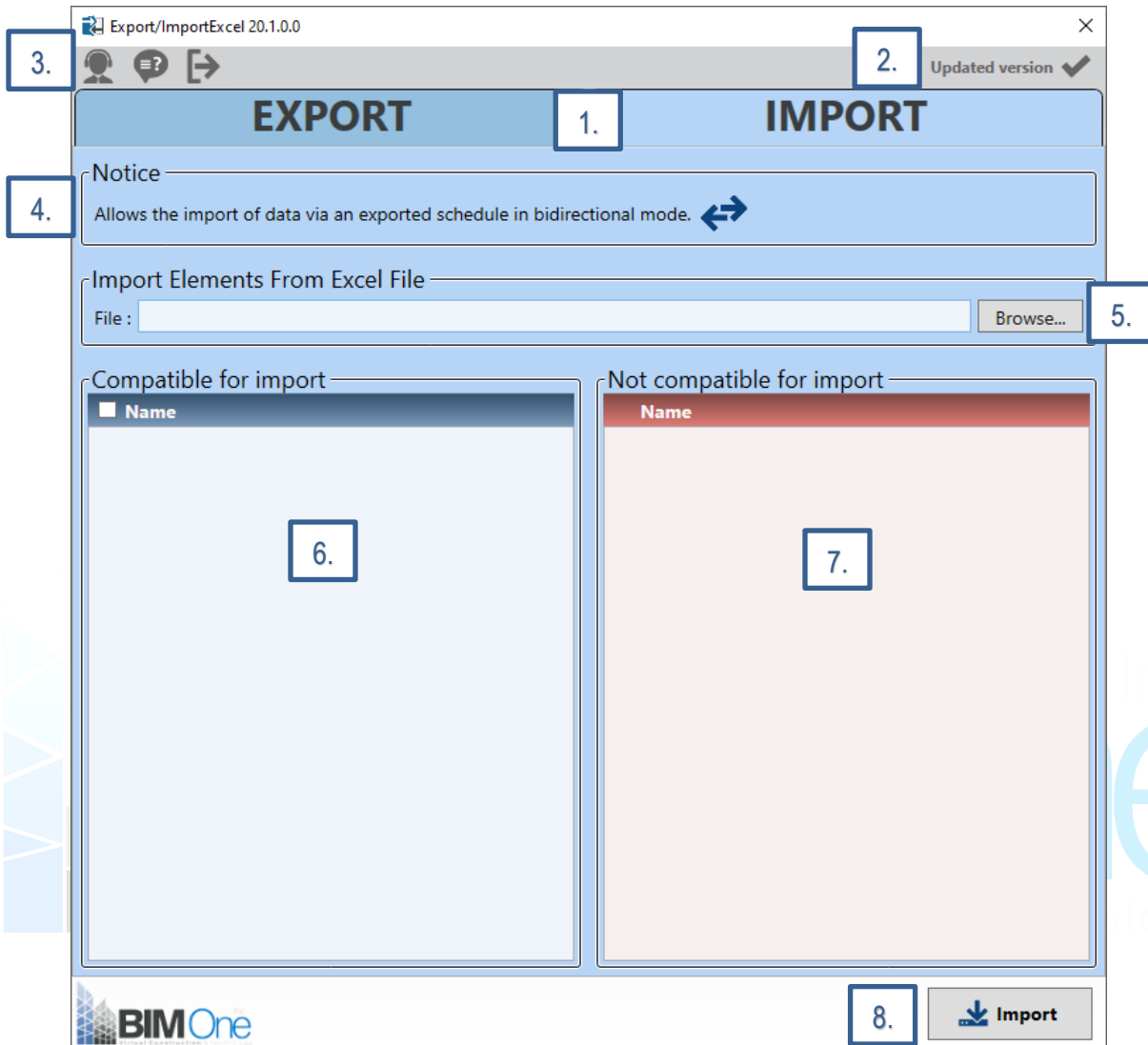


1. Navigation by tab
2. Update indicator
3. Toolbar
4. Schedules selection

5. Standards selection
6. Export mode selection
7. Export button



## Importation



1. Navigation by tab
2. Update indicator
3. Toolbar
4. Notice

5. Browse button to select Excel file
6. List of schedules that can be exported
7. List of schedules that cannot be exported
8. Import button

# PROCESSES

## Exporting in unidirectional mode

### Description

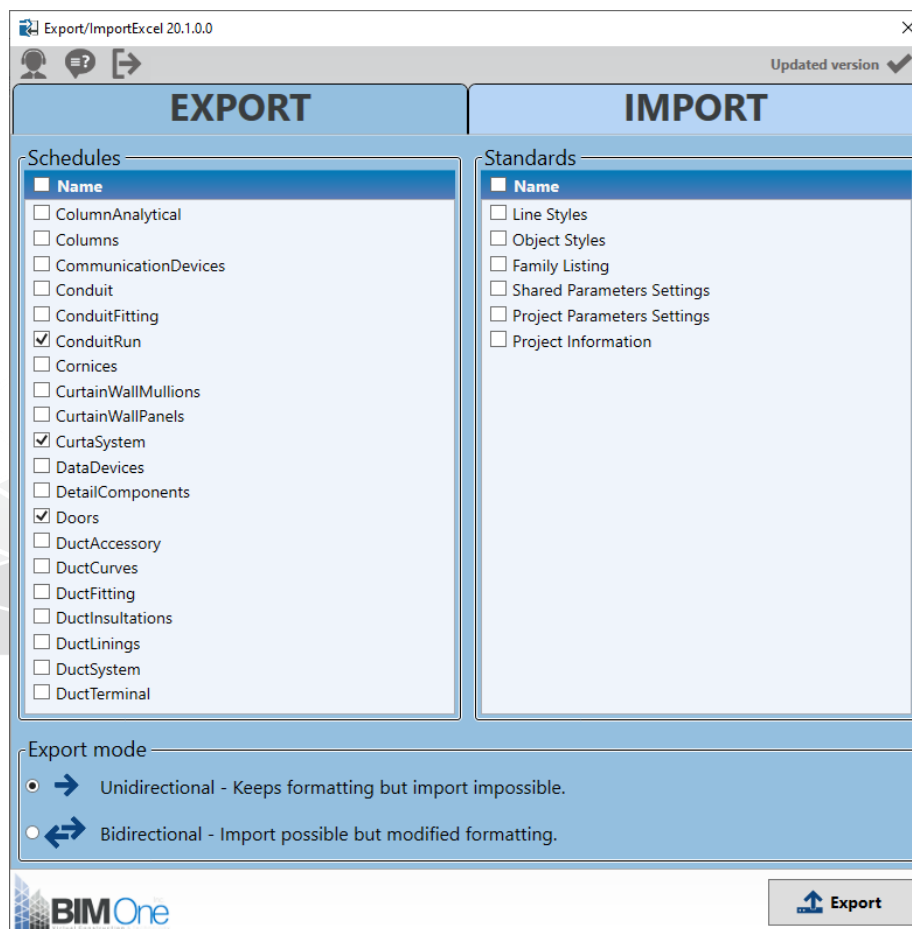
The unidirectional mode allows one or more schedules to be exported with the same appearance as in Revit. However, please take note that the shaping of the text and cells will not be applied in the Excel file.



**WARNING! Excel files produced with the unidirectional mode cannot be imported in the future.**

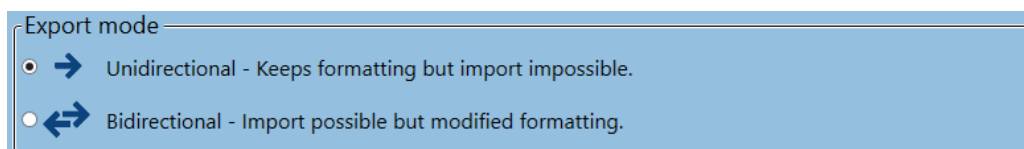
### Step 1 - Choosing schedules

Using a hook, select the schedules you want to export into an Excel file. There is no maximum limit.



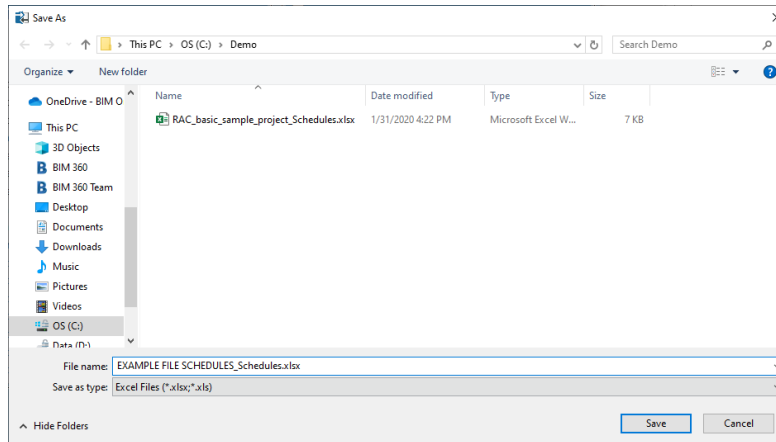
### Step 2 - Selecting the export mode.

Select the Unidirectional mode



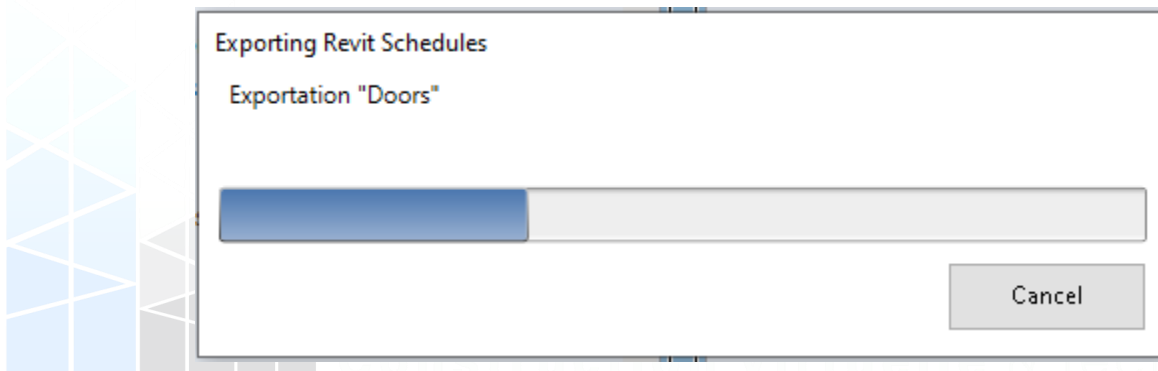
### Step 3 - Choice of directory and file name for export

Once you select the “Export” button, you'll have a choice of where to save your file and the possibility to rename it.

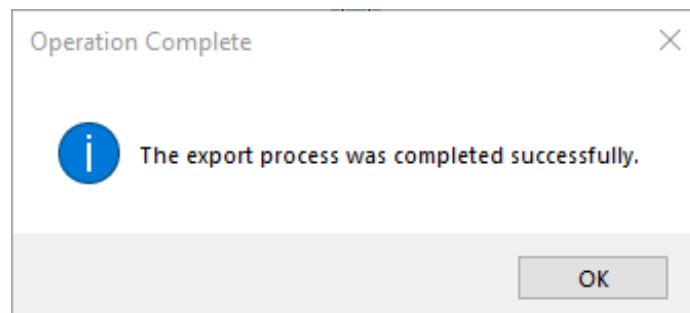


### Step 4 - Export progress

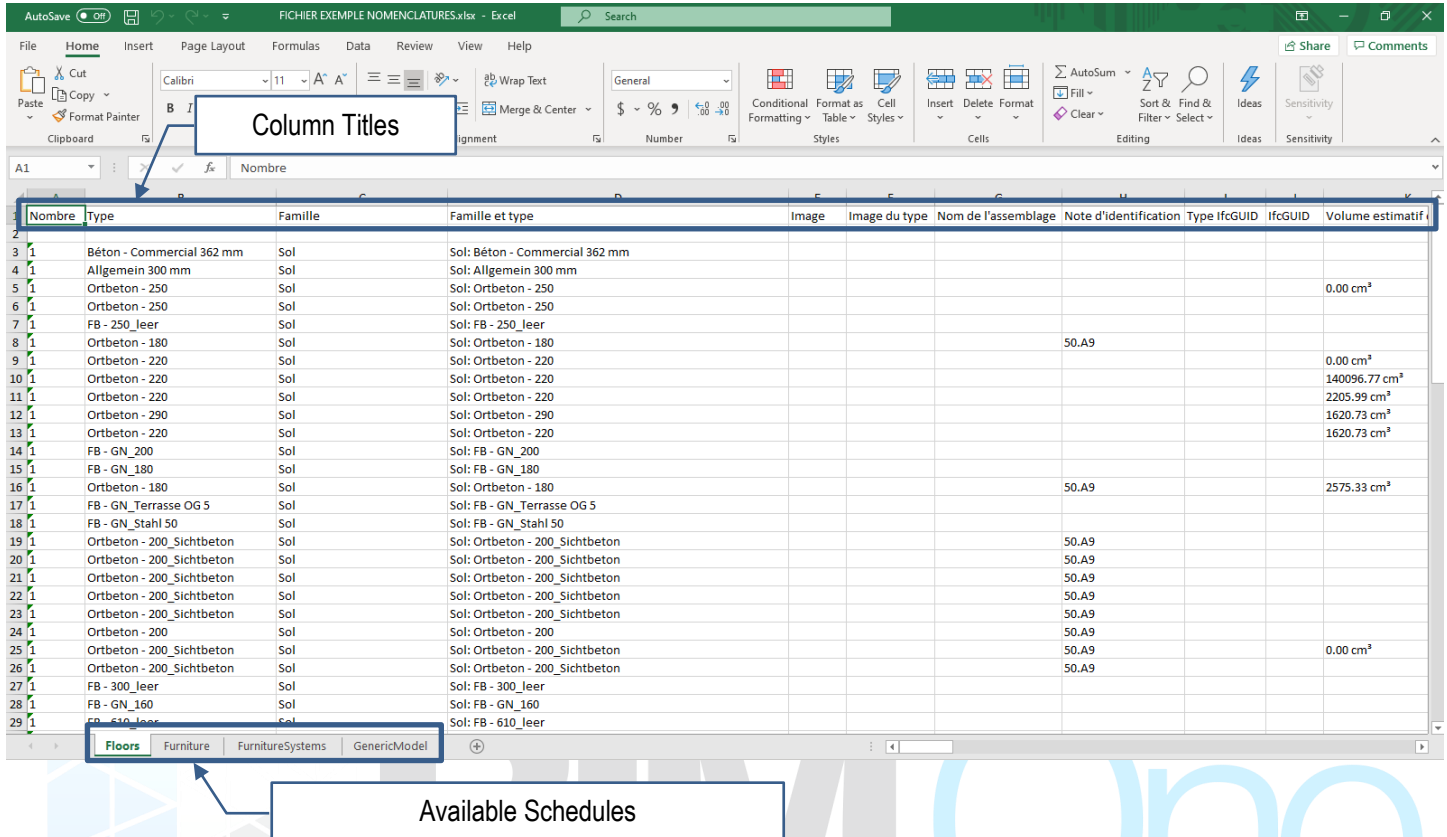
As soon as you click the “Save” button, a progress bar will show up and allows you to track the processing of the export and the creation of the Excel file. You can cancel at any time by clicking on the “Cancel” button.



A confirmation message will appear once the export process is completed successfully.



## Step 5 - Viewing the result



Column Titles

Nombre	Type	Famille	Famille et type	Image	Image du type	Nom de l'assemblage	Note d'identification	Type IfcGUID	IfcGUID	Volume estimatif
3	Béton - Commercial 362 mm	Sol	Sol: Béton - Commercial 362 mm							
4	Allgemein 300 mm	Sol	Sol: Allgemein 300 mm							
5	Ortbeton - 250	Sol	Sol: Ortbeton - 250							0.00 cm³
6	Ortbeton - 250	Sol	Sol: Ortbeton - 250							
7	FB - 250_leer	Sol	Sol: FB - 250_leer							
8	Ortbeton - 180	Sol	Sol: Ortbeton - 180				50.A9			
9	Ortbeton - 220	Sol	Sol: Ortbeton - 220							0.00 cm³
10	Ortbeton - 220	Sol	Sol: Ortbeton - 220							140096.77 cm³
11	Ortbeton - 220	Sol	Sol: Ortbeton - 220							2205.99 cm³
12	Ortbeton - 290	Sol	Sol: Ortbeton - 290							1620.73 cm³
13	Ortbeton - 220	Sol	Sol: Ortbeton - 220							1620.73 cm³
14	FB - GN_200	Sol	Sol: FB - GN_200							
15	FB - GN_180	Sol	Sol: FB - GN_180							
16	Ortbeton - 180	Sol	Sol: Ortbeton - 180				50.A9			2575.33 cm³
17	FB - GN_Terrasse OG 5	Sol	Sol: FB - GN_Terrasse OG 5							
18	FB - GN_Stahl 50	Sol	Sol: FB - GN_Stahl 50							
19	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
20	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
21	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
22	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
23	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
24	Ortbeton - 200	Sol	Sol: Ortbeton - 200				50.A9			
25	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			0.00 cm³
26	Ortbeton - 200_Sichtbeton	Sol	Sol: Ortbeton - 200_Sichtbeton				50.A9			
27	FB - 300_leer	Sol	Sol: FB - 300_leer							
28	FB - GN_160	Sol	Sol: FB - GN_160							
29	FB - 610_leer	Sol	Sol: FB - 610_leer							

Available Schedules

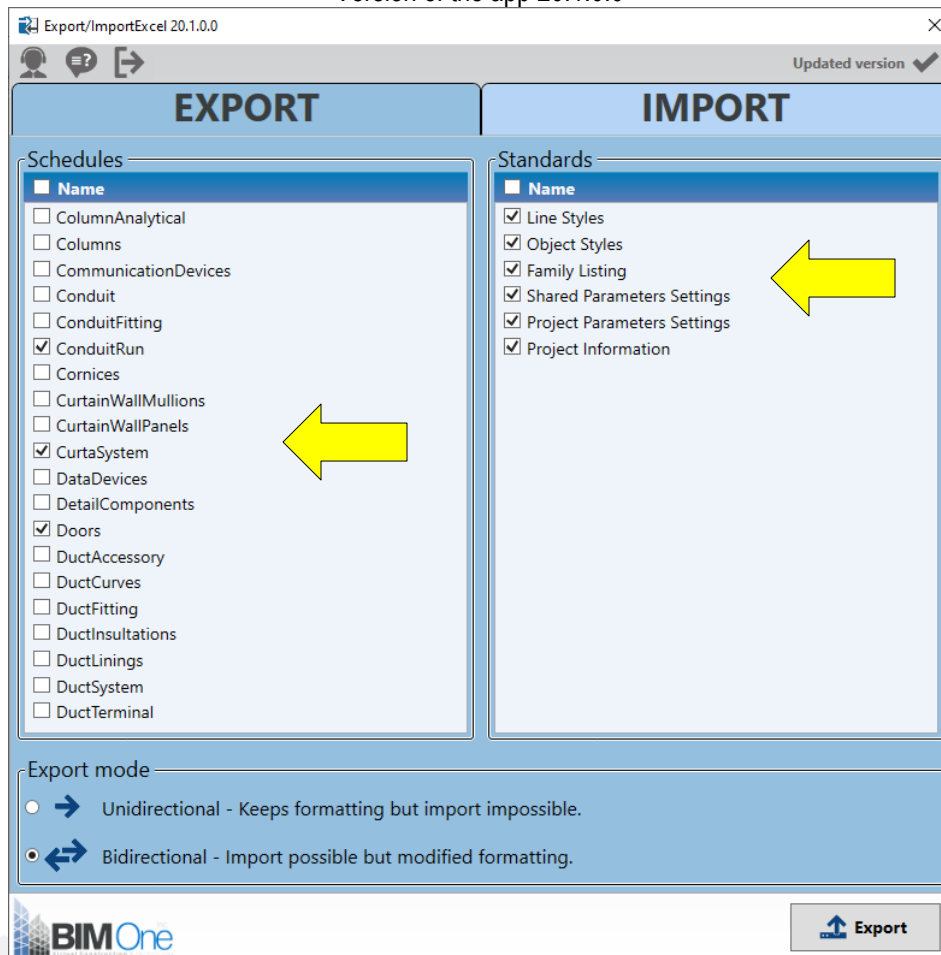
## Exporting in bidirectional mode

### Description

The bidirectional mode allows you to export schedules for the purpose of making changes to the data. Once the changes are made in the Excel file, you can import it back in order to update the information in the digital models.

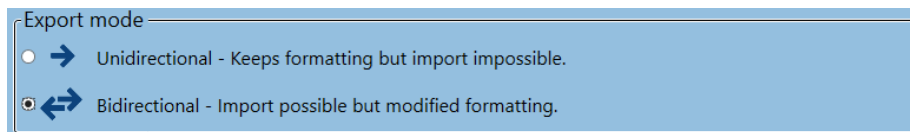
### Step 1 - Choosing schedules

Using a hook, select the schedules you want to export into an Excel file. There is no maximum limit. You can also select your choices in the area within the list of schedules and in the area that includes the list of standards that can be exported. If you select items from both lists, a minimum of two Excel files will be created.



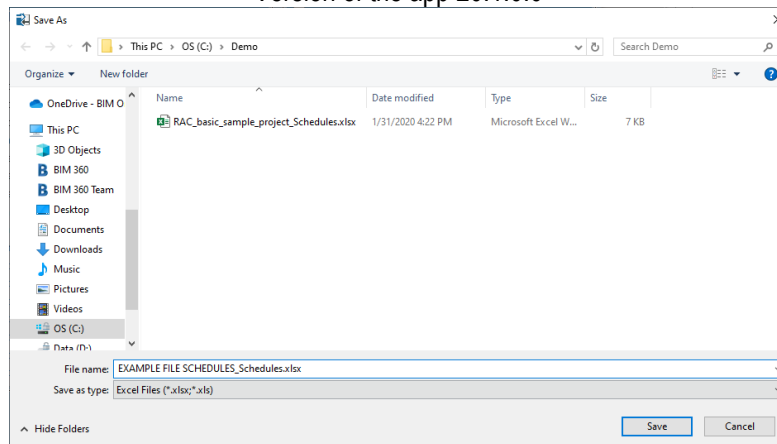
## Step 2 - Selecting the export mode.

You select the "Bidirectional" mode



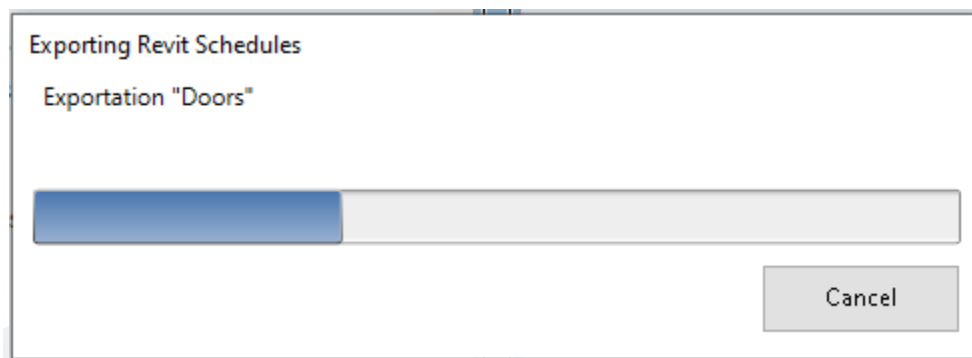
## Step 3 - Choice of directory and file name for export

Once you select the "Export" button, you'll have a choice of where to save your file and the option to rename it. If you've selected items from both lists (Schedules and Standards), two Excel files will be created. It will ask you for the location and the file name for the Excel file containing the schedules checked in the list. Then, once the schedules export is completed, it will ask you for the location and the file name of the Excel file containing the standards checked in the list.

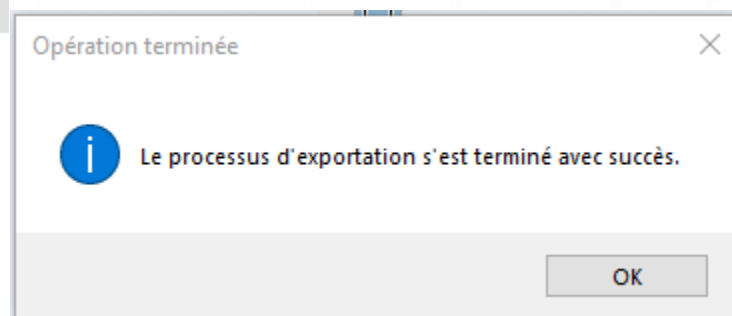


#### Step 4 - Export progress

As soon as you click the “Save” button, a progress bar will show up and allows you to track the processing of the export and the creation of the Excel file. You can cancel at any time, by clicking on the “Cancel” button.



A confirmation message will appear once the export process is completed successfully.

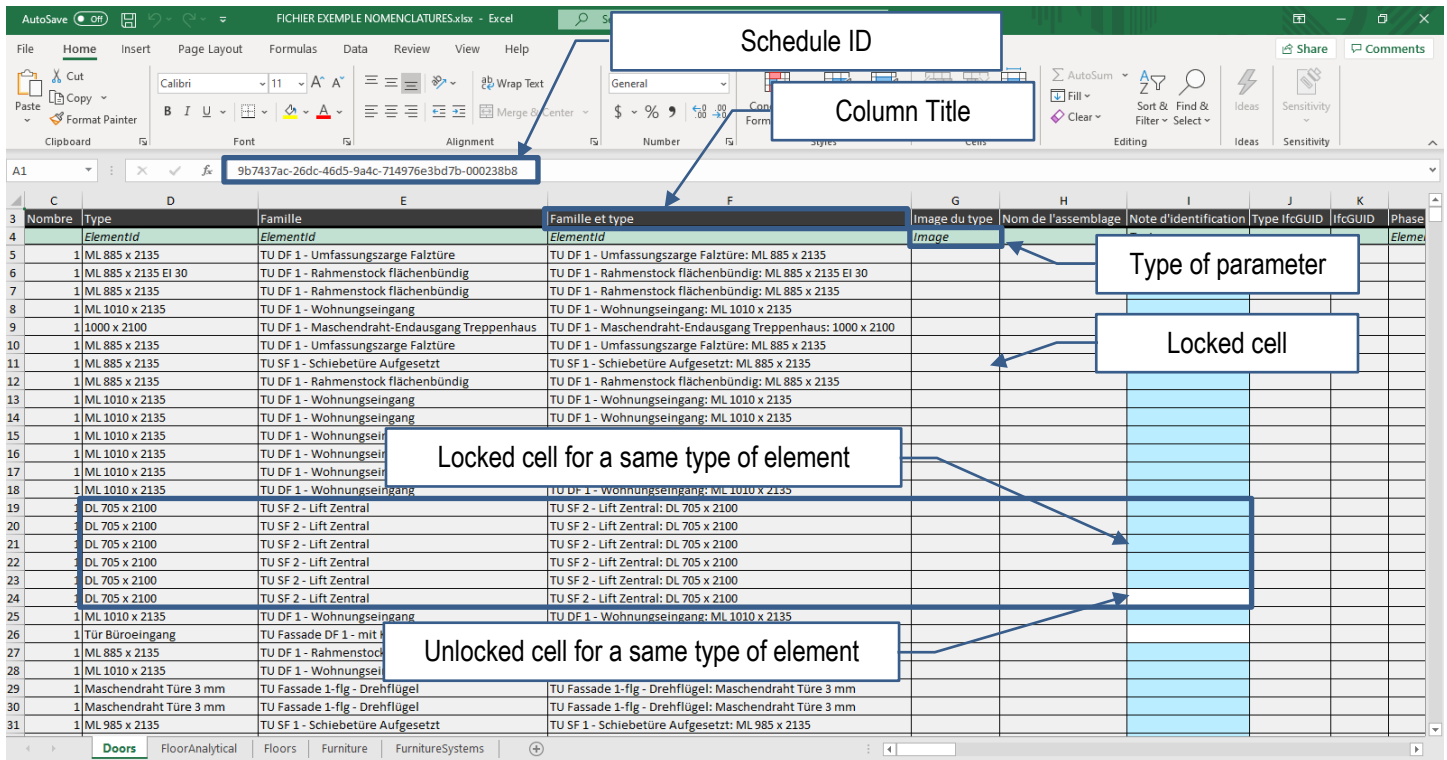


#### Step 5 - Viewing the result

When exporting with the bidirectional mode, the Excel file is already formatted to make it easier to manage:

- The titles of the columns are frozen
- The types of parameters are displayed below the titles of each column
- The cells that cannot be modified are locked and grayed out

- For columns combining several types of identical elements, only the value of the last element corresponding to the same type can be changed. In this case, the cells that cannot be modified are in blue.



Nombre	Type	Famille	Famille et type	Image du type	Nom de l'assemblage	Note d'identification	Type IfcGUID	IfcGUID	Phase
1	ML 885 x 2135	TU DF 1 - Umfassungszarge Falztüre	TU DF 1 - Umfassungszarge Falztüre: ML 885 x 2135						
1	ML 885 x 2135 EI 30	TU DF 1 - Rahmenstock flächenbündig	TU DF 1 - Rahmenstock flächenbündig: ML 885 x 2135 EI 30						
1	ML 885 x 2135	TU DF 1 - Rahmenstock flächenbündig	TU DF 1 - Rahmenstock flächenbündig: ML 885 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	1000 x 2100	TU DF 1 - Maschendraht-Endausgang Treppenhaus	TU DF 1 - Maschendraht-Endausgang Treppenhaus: 1000 x 2100						
1	ML 885 x 2135	TU DF 1 - Umfassungszarge Falztüre	TU DF 1 - Umfassungszarge Falztüre: ML 885 x 2135						
1	ML 885 x 2135	TU SF 1 - Schiebetüre Aufgesetzt	TU SF 1 - Schiebetüre Aufgesetzt: ML 885 x 2135						
1	ML 885 x 2135	TU DF 1 - Rahmenstock flächenbündig	TU DF 1 - Rahmenstock flächenbündig: ML 885 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	DL 705 x 2100	TU SF 2 - Lift Zentral	TU SF 2 - Lift Zentral: DL 705 x 2100						
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang	TU DF 1 - Wohnungseingang: ML 1010 x 2135						
1	Tür Büroeingang	TU Fassade DF 1 - mit							
1	ML 885 x 2135	TU DF 1 - Rahmenstock							
1	ML 1010 x 2135	TU DF 1 - Wohnungseingang							
1	Maschendraht Türe 3 mm	TU Fassade 1-flg - Drehflügel	TU Fassade 1-flg - Drehflügel: Maschendraht Türe 3 mm						
1	Maschendraht Türe 3 mm	TU Fassade 1-flg - Drehflügel	TU Fassade 1-flg - Drehflügel: Maschendraht Türe 3 mm						
1	ML 985 x 2135	TU SF 1 - Schiebetüre Aufgesetzt	TU SF 1 - Schiebetüre Aufgesetzt: ML 985 x 2135						

## Import

### Description

Importing can only be done by using an Excel file that has previously been exported in bidirectional mode. The import will allow the modification of the values that have been changed in the Excel file.

### Step 1 - Excel file selection

In the Import tab, using the "Browse" button, you need to select the Excel file you want to import.

EXPORT	IMPORT
<p><b>Notice</b></p> <p>Allows the import of data via an exported schedule in bidirectional mode. ↔</p>	
<p><b>Import Elements From Excel File</b></p> <p>File : C:\Demo\EXAMPLE FILE SCHEDULES_Schedules.xlsx <span style="float: right;">Browse...</span></p>	

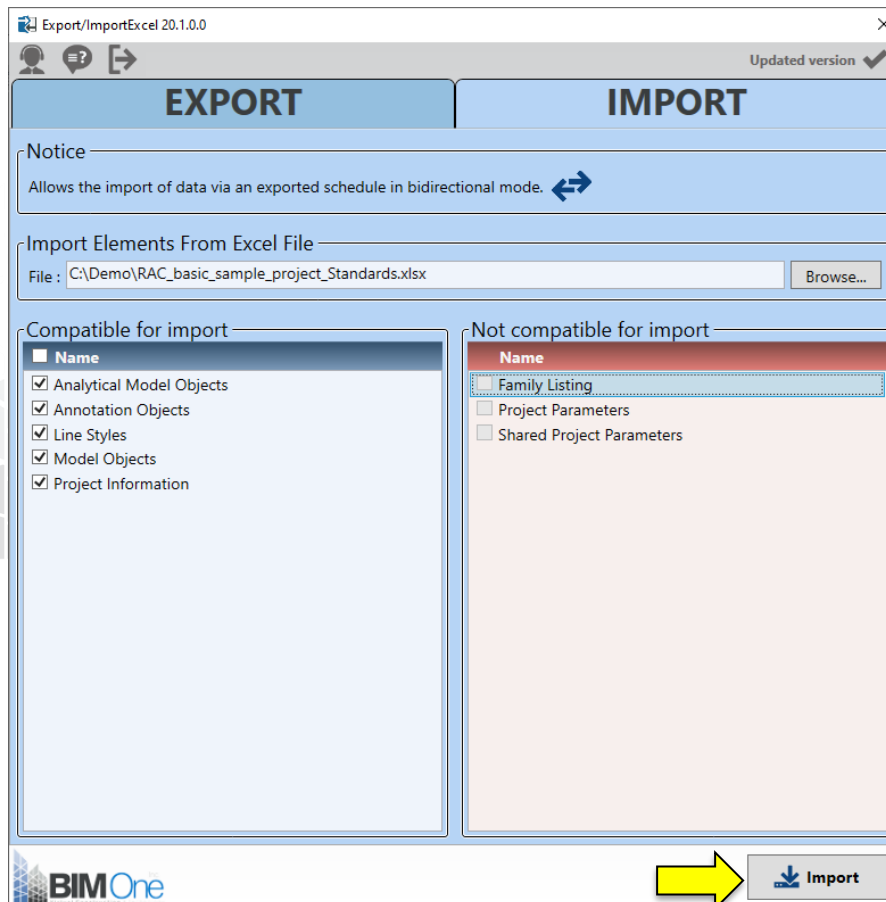
### Step 2 - Selecting the schedules to import

After selecting a valid Excel file, you'll find a list of available schedules for an import. You then have to choose one or more schedules to be imported from the "**Compatible for import**" list. The "**Not compatible for import**" list contains a list of schedules contained in the Excel file that cannot be imported.


EXPORT		IMPORT											
<b>Notice</b> Allows the import of data via an exported schedule in bidirectional mode. ↔													
<b>Import Elements From Excel File</b> File : C:\Demo\RAC_basic_sample_project_Standards.xlsx <span>Browse...</span>													
<b>Compatible for import</b> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Analytical Model Objects</td></tr> <tr><td><input type="checkbox"/> Annotation Objects</td></tr> <tr><td><input type="checkbox"/> Line Styles</td></tr> <tr><td><input type="checkbox"/> Model Objects</td></tr> <tr><td><input type="checkbox"/> Project Information</td></tr> </tbody> </table>		Name	<input type="checkbox"/> Analytical Model Objects	<input type="checkbox"/> Annotation Objects	<input type="checkbox"/> Line Styles	<input type="checkbox"/> Model Objects	<input type="checkbox"/> Project Information	<b>Not compatible for import</b> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Family Listing</td></tr> <tr><td><input type="checkbox"/> Project Parameters</td></tr> <tr><td><input type="checkbox"/> Shared Project Parameters</td></tr> </tbody> </table>		Name	<input type="checkbox"/> Family Listing	<input type="checkbox"/> Project Parameters	<input type="checkbox"/> Shared Project Parameters
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<input type="checkbox"/> Analytical Model Objects													
<input type="checkbox"/> Annotation Objects													
<input type="checkbox"/> Line Styles													
<input type="checkbox"/> Model Objects													
<input type="checkbox"/> Project Information													
Name													
<input type="checkbox"/> Family Listing													
<input type="checkbox"/> Project Parameters													
<input type="checkbox"/> Shared Project Parameters													

### Step 3 - Import authorization

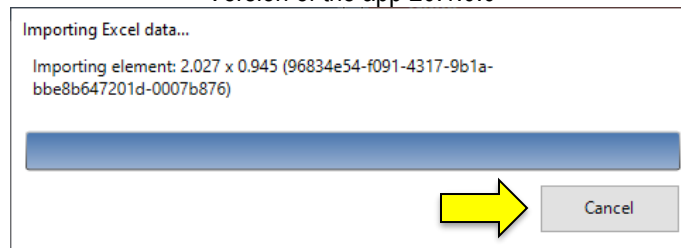
When you're ready, you click the "Import" button. A progress bar will show up and will allow you to follow the import process. You can cancel at any time by clicking on the "Cancel" button.



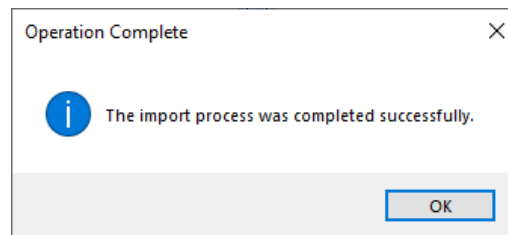
EXPORT		IMPORT											
<b>Notice</b> Allows the import of data via an exported schedule in bidirectional mode. ↔													
<b>Import Elements From Excel File</b> File : C:\Demo\RAC_basic_sample_project_Standards.xlsx <span>Browse...</span>													
<b>Compatible for import</b> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> Analytical Model Objects</td></tr> <tr><td><input checked="" type="checkbox"/> Annotation Objects</td></tr> <tr><td><input checked="" type="checkbox"/> Line Styles</td></tr> <tr><td><input checked="" type="checkbox"/> Model Objects</td></tr> <tr><td><input checked="" type="checkbox"/> Project Information</td></tr> </tbody> </table>		Name	<input checked="" type="checkbox"/> Analytical Model Objects	<input checked="" type="checkbox"/> Annotation Objects	<input checked="" type="checkbox"/> Line Styles	<input checked="" type="checkbox"/> Model Objects	<input checked="" type="checkbox"/> Project Information	<b>Not compatible for import</b> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Family Listing</td></tr> <tr><td><input type="checkbox"/> Project Parameters</td></tr> <tr><td><input type="checkbox"/> Shared Project Parameters</td></tr> </tbody> </table>		Name	<input type="checkbox"/> Family Listing	<input type="checkbox"/> Project Parameters	<input type="checkbox"/> Shared Project Parameters
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<input checked="" type="checkbox"/> Model Objects													
<input checked="" type="checkbox"/> Project Information													
Name													
<input type="checkbox"/> Family Listing													
<input type="checkbox"/> Project Parameters													
<input type="checkbox"/> Shared Project Parameters													


Import





A confirmation message will appear once the import process is completed successfully.



## NEED MORE SUPPORT?

Send us a short description of the issue(s) you are facing at the following address: <https://bimone.freshdesk.com/support/tickets/new> in order to start a support ticket within our automated platform.

