Transfer data from Revit to Excel and vice versa
# Table of contents

INTRODUCTION .................................................................................................................. 3
  Description ...................................................................................................................... 3
  Benefits ............................................................................................................................ 3

INSTALLATION .................................................................................................................... 3

UNINSTALLING ..................................................................................................................... 3
  With the BIM One Add-Ins Manager software ............................................................. 3
  Without the BIM One Add-Ins Manager software ....................................................... 5

USER INTERFACE ............................................................................................................. 7
  Exportation ...................................................................................................................... 7
  Importation ..................................................................................................................... 8

PROCESSES ....................................................................................................................... 9
  Exporting in unidirectional mode ................................................................................. 9
    Description .................................................................................................................. 9
    Step 1 - Choosing schedules ..................................................................................... 9
    Step 2 - Selecting the export mode .......................................................................... 9
    Step 3 - Choice of directory and file name for export ............................................. 10
    Step 4 - Export progress ......................................................................................... 10
    Step 5 - Viewing the result ...................................................................................... 11
  Exporting in bidirectional mode ............................................................................... 11
    Description ................................................................................................................ 11
    Step 1 - Choosing schedules ................................................................................... 11
    Step 2 - Selecting the export mode ....................................................................... 12
    Step 3 - Choice of directory and file name for export ...................................... 12
    Step 4 - Export progress ....................................................................................... 13
    Step 5 - Viewing the result ................................................................................... 13

Import ................................................................................................................................ 14
  Description ................................................................................................................ 14
  Step 1 - Excel file selection ...................................................................................... 14
  Step 2 - Selecting the schedules to import .............................................................. 14
  Step 3 - Import authorization ............................................................................... 15
INTRODUCTION

Description
This Revit add-in (Excel Export-Import 2015-2020) allows you to 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
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

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.

<table>
<thead>
<tr>
<th>No.</th>
<th>Type</th>
<th>Family</th>
<th>Description</th>
<th>Image</th>
<th>Volume estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Soil</td>
<td>300</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Soil</td>
<td>250</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Soil</td>
<td>180</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Soil</td>
<td>120</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Soil</td>
<td>220</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Soil</td>
<td>200</td>
<td>Soil</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Available Schedules
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.

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.

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.
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.
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.