

## Eagle Point Solution to a Frequently Asked Question

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### How to export a plant database to Excel and import it into the Quantity Takeoff database

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#### Summary:

This document walks you through the process exporting a plant database from the Plant Database module to a Microsoft Excel spreadsheet and then importing the spreadsheet into the Quantity Takeoff database.

**Product:** Eagle Point Software™ 2001

**Release:** 2001 Q1 or 1.1.0 and greater

**Platform:** All

**Related documents:**

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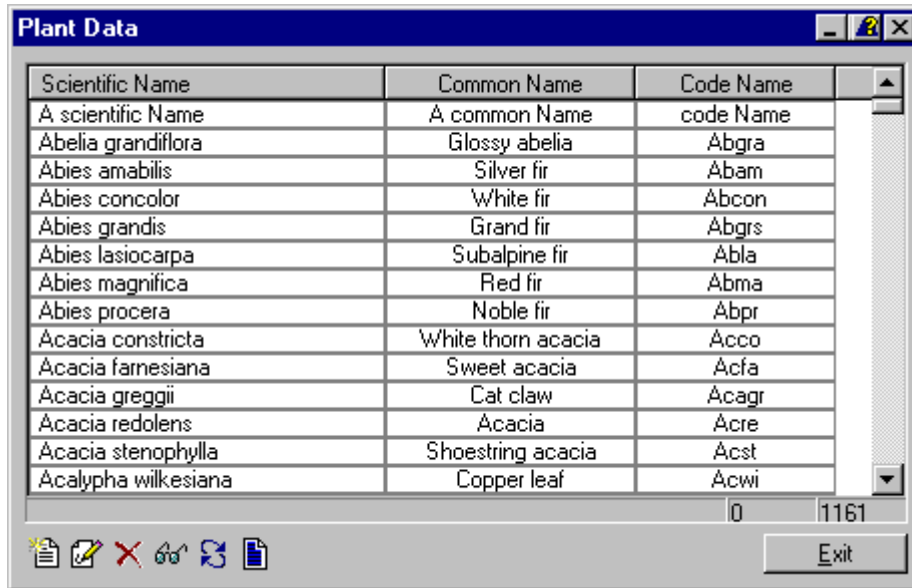
#### 1. From the main Eagle Point toolbar select Products > Plant Database.

The plant database tool bar displays.



#### 2. Select the Data pull-down menu > Display.

The Plant Data dialog box displays.



3. **Select the plant names you wish to export to QTO. This can be done by holding down the CTRL button on the keyboard and selecting the plants with a left mouse click, or you can simply click on the Select All icon.**

The Select All icon highlights all of the plants in the Plant Data dialog box.

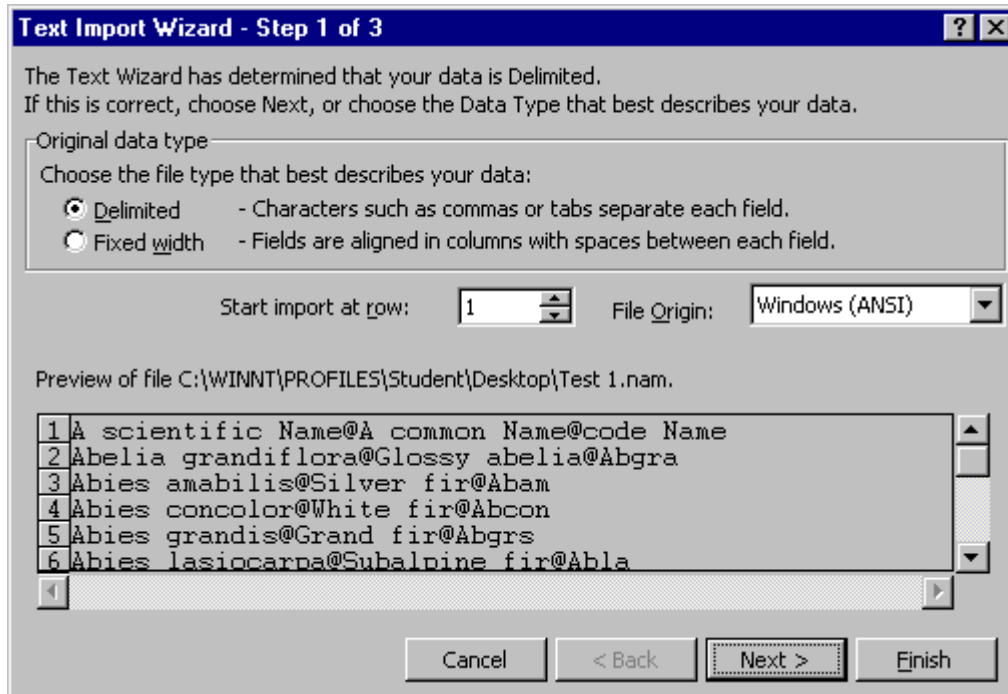


4. **Select the Data pull-down menu > Export to name file.**

You are prompted for a name and location of this file.

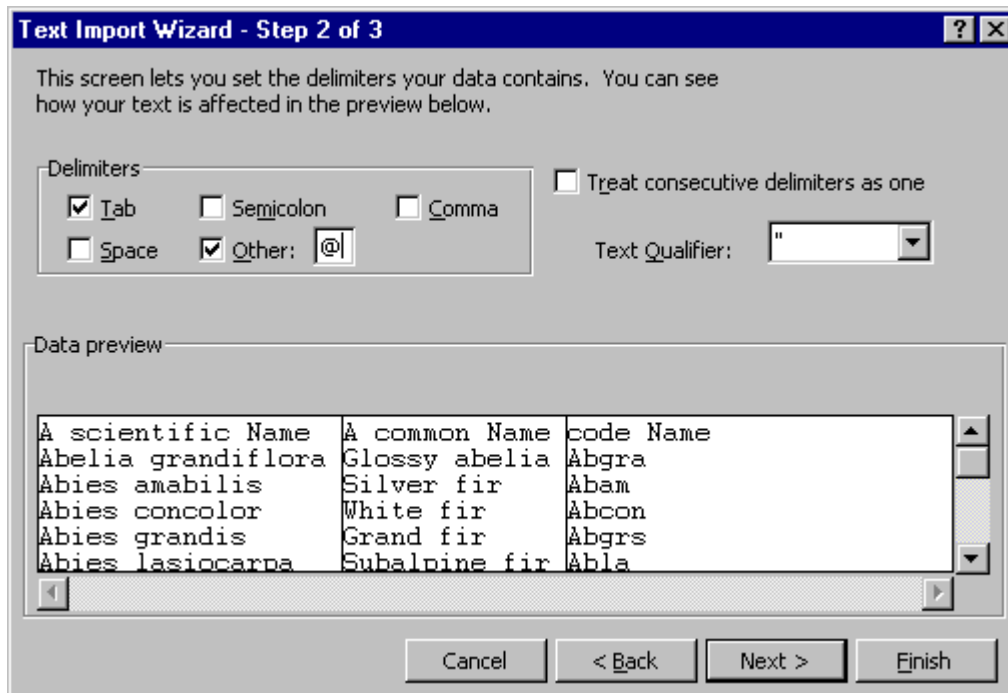
5. **Type in a name and click on Save.**
6. **Launch the Excel program.**
7. **In Excel, select the File pull-down menu > Open.**
8. **Use the Windows browser to find the location of the .nam file that was exported. You will need to change the file of type to (all files) to display the name file.**
9. **Highlight the .nam file and click on Open.**

The Text Import from Excel wizard displays.



10. Select the Delimited radio button and click on Next.

Step 2 of the wizard displays.



11. Select the Other check box and type @ in the available edit box. Click on Finish.

The file imports.

12. Select all columns.

13. Select the Format pull-down menu > Column > Auto fit selection.

This displays all of the information in the excel fields. The only information you need is the Scientific Name or Common Name.

14. Delete the other two columns by selecting the column header and clicking on Delete.

You will now add the necessary columns headers for the Quantity Takeoff imports.

15. Highlight row number one, right mouse click and select Insert.

This creates a blank column on the top so the headers can be added. The necessary fields for Quantity Takeoff are Description, Item ID, CSI Division, Units of Measure, Unit Cost 1, Unit Cost 2 and Plant Size. The column header for the Scientific Name or Common Name is Description.

16. Add the rest of the column headers (order doesn't matter as the import allows you to specify the order in which the columns are imported).

Excel example:

	A	B	C	D	E	F	G
1	Description	Item Id	CSI	Planting size	Unit cost 1	Unit cost 2	Unit of measure
2	A scientific Name						
3	Abelia grandiflora						
4	Abies amabilis						

#### Populating the Item ID number fields

1. Type in an 8-character alpha or numeric item ID number in the cell below the Item ID number header, e.g. 10000010.

2. In the next row down, type in the next number in sequence, e.g. 10000020.

You will want to space the numbers out so that you will have the ability to add items in between at a later time.

3. To get the numbers to automatically populate the cells in the rest of the column, select the two cells already populated.

Example of highlighted cells:

	A	B
1	Description	Item Id
2	A scientific Name	10000010
3	Abelia grandiflora	10000020
4	Abies amabilis	
5	Abies concolor	
6	Abies grandis	
7	Abies lasiocarpa	

	A	B	
1	Description	Item Id	C
2	A scientific Name	10000010	
3	Abelia grandiflora	10000020	
4	Abies amabilis	10000030	
5	Abies concolor	10000040	
6	Abies grandis	10000050	
7	Abies lasiocarpa	10000060	
8	Abies magnifica	10000070	
9	Abies procera	10000080	
10	Acacia constricta	10000090	
11	Acacia farnesiana	10000100	
12	Acacia greggii	10000110	
13	Acacia redolens	10000120	
14	Acacia stenophylla	10000130	
15	Acalypha wilkesiana	10000140	

- Place your cursor on the grip that is located in the lower right hand corner of the cells. The grip is a black square.
- Drag the grip down to the end of the column by holding your left mouse button down, and then when you are at the bottom of the column release the left mouse button.

This automatically populates the fields in numeric order with the sequence that was provided.

- Type in a CSI division number, Unit Cost 1, Unit Cost 2 and Unit of Measure. Use 0's for the unit costs and a unit of measure of EA.

The CSI division number indicates where the import goes when imported into the Quantity Takeoff database. The unit costs need to be modified after the plant sizes have been established.

- Highlight all of the columns excluding the Description and Item ID number.
- Select the grip, hold the left mouse button down and drag the grip to the bottom of the column.

This automatically populates all of the cells in those columns with the same information.

Example:

	A	B	C	D	E	F	G
1	Description	Item Id	CSI	Planting size	Unit cost 1	Unit cost 2	Unit of measure
2	A scientific Name	10000010	5		0	0	ea
3	Abelia grandiflora	10000020	5		0	0	ea
4	Abies amabilis	10000030	5		0	0	ea
5	Abies concolor	10000040	5		0	0	ea
6	Abies grandis	10000050	5		0	0	ea
7	Abies lasiocarpa	10000060	5		0	0	ea
8	Abies magnifica	10000070	5		0	0	ea
9	Abies procera	10000080	5		0	0	ea
10	Acacia constricta	10000090	5		0	0	ea
11	Acacia farnesiana	10000100	5		0	0	ea
12	Acacia greggii	10000110	5		0	0	ea
13	Acacia redolens	10000120	5		0	0	ea
14	Acacia stenophylla	10000130	5		0	0	ea
15	Acalypha wilkesiana	10000140	5		0	0	ea
16							
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### Inserting Planting sizes for each plant

Using the same techniques above, you will add all of the planting sizes for each plant.

1. Highlight the number of rows underneath the first plant name needed to accommodate the number of plant sizes.
2. Right mouse click and select Insert.  
This places the necessary empty cells.
3. Highlight the cell with the plant name.
4. Select the grip in the lower right hand corner of the cell and drag it down to the end of the empty cells.  
This copies the name to all of the cells.
5. In the empty cell below the Item ID, type in the next number in sequence (e.g., if the Item ID number in the first cell is 10000010, type in 10000011).
6. Highlight the two Item ID cells.

7. Select the grip and drag down to the end of the empty cells.

This populates the cells with the numbering sequence that you provide.

8. Type in the first plant size, e.g. 1 gallon.

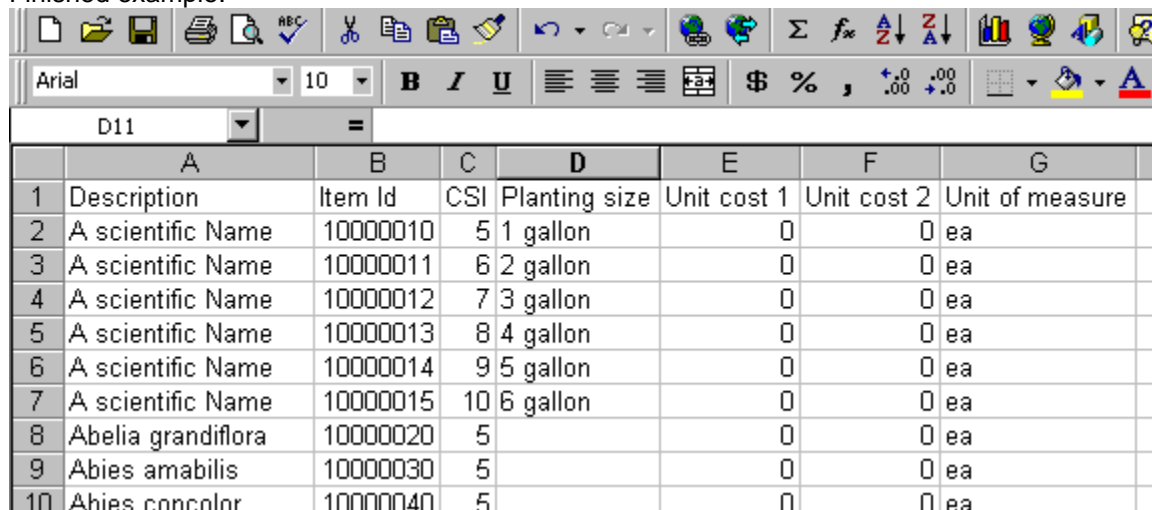
9. Highlight the cells containing the CSI, Planting Size, Unit Cost 1, Unit Cost 2 and Unit of Measure in the row containing the original plant size.

10. Select the grip and drag down to the end of the empty row.

This automatically copies the information from the original cells to the empty cells.

11. Change all of the costs to the desired numbers.

Finished example:



	A	B	C	D	E	F	G
1	Description	Item Id	CSI	Planting size	Unit cost 1	Unit cost 2	Unit of measure
2	A scientific Name	10000010	5	1 gallon	0	0	ea
3	A scientific Name	10000011	6	2 gallon	0	0	ea
4	A scientific Name	10000012	7	3 gallon	0	0	ea
5	A scientific Name	10000013	8	4 gallon	0	0	ea
6	A scientific Name	10000014	9	5 gallon	0	0	ea
7	A scientific Name	10000015	10	6 gallon	0	0	ea
8	Abelia grandiflora	10000020	5		0	0	ea
9	Abies amabilis	10000030	5		0	0	ea
10	Abies concolor	10000040	5		0	0	ea

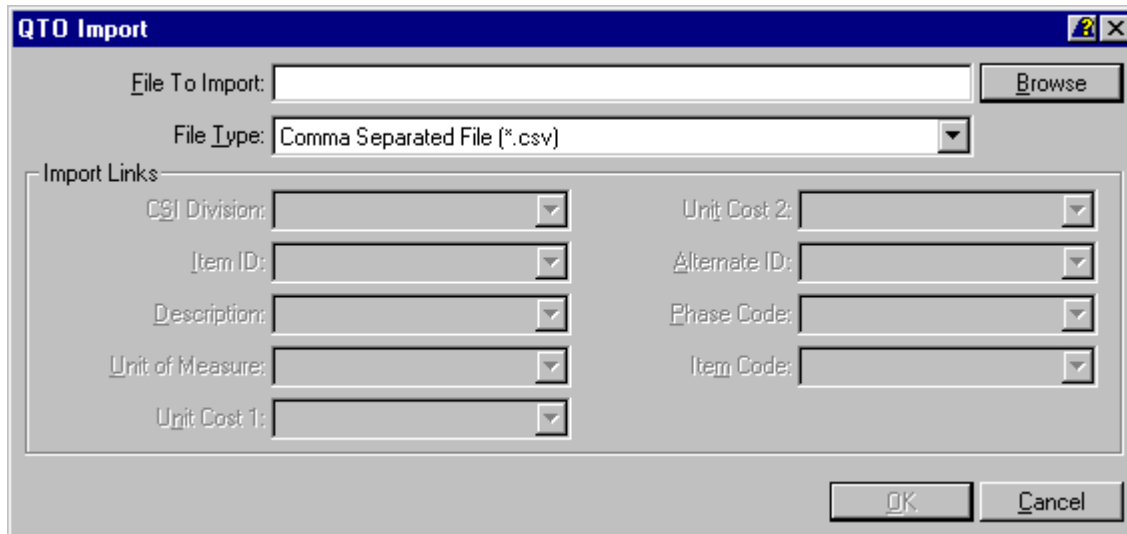
12. Follow the above steps with each of the plants in the list.

### Importing into Quantity Takeoff

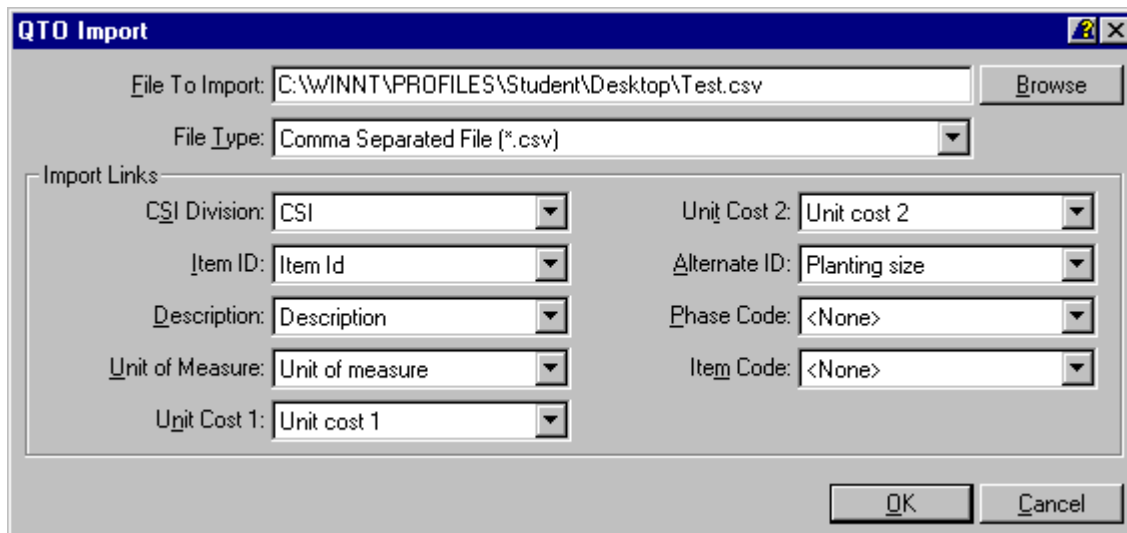
1. From the File pull-down menu, select Save as.

You are prompted to select a file name and location for this file.

2. Change the file of type to \*.csv.
3. Type in a name and click on Save.
4. Launch Eagle Point.
5. From the main Eagle Point tool bar select Products > Quantity Takeoff.
6. In Quantity Takeoff, select Database > Import.



7. Change the File Type to \*.csv.
8. Click on Browse and find the file that was exported from Excel.
9. Change each of the Import options to the correct header, e.g. change the CSI division number to CSI from the drop list. Do this for each of the import fields.



10. Click on OK.

If there are any errors a dialog box will display with the error highlighted in red. Make the necessary changes and try the import again. When the import is complete, a dialog box displays the number of records successfully imported.

11. Click on Done.
12. Double-check the import in the Quantity Takeoff database.