



COMPLETE USER GUIDE · VERSION 1.0

ADLM Installer Hub & ADLM Heron

Everything in one book — installing the Hub, signing in, installing and updating your products, then opening PlanSwift, scaling your drawings, measuring with the ADLM template tree, and turning it all into a priced bill of quantities.

1 · Install the Hub

2 · Sign in

3 · Install & update

4 · Scale

5 · Take off

6 · Price & export

START HERE

What's in this guide

Two parts. **Part One** gets the software onto your PC and keeps it current. **Part Two** is the work itself — scaling drawings, measuring, and producing a priced bill. Read your part front to back the first time; after that, jump straight to what you need.

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ABOUT THE FIGURES IN THIS GUIDE

Every screen shown here is drawn to match the real thing — same layout, same colours, same button labels and status wording you will see on your own PC. Names, product lists, quantities and version numbers will differ, because those come from your own account and your own job.

CHAPTER 1

Before you start

The Installer Hub replaces zip files, manual folder copying and DLL hunting. It signs you in once, then installs, updates and repairs every ADLM product you are subscribed to.

What you need

A Windows PC

Windows 10 or Windows 11, 64-bit. You need an account that can approve the Windows administrator prompt.

An ADLM account

The same email and password you use to sign in at **adlmstudio.net**. Subscriptions are read from that account.

An internet connection

Needed to sign in and download packages. Once a product is installed it runs offline.

Where to get the Hub

1 Sign in to adlmstudio.net

Use the browser on the PC you want to install on.

2 Open your account / downloads area

The Installer Hub download is listed there.

3 Download `ADLMInstallerHubSetup.exe`

It is a normal Windows installer, roughly 30 seconds to install.

How the Hub fits together

PART	WHAT IT DOES FOR YOU
Your ADLM account	Holds your purchases and subscriptions. The Hub reads them at sign-in — nothing is entered manually.
Installation Center	Shows only the products you have actually bought, and installs them with one click.
Your PC	The Hub remembers what it installed here, so it can tell you when an update is available or repair a broken install.

GOOD TO KNOW

You never have to find folders, copy `.dll` files or edit Revit `.addin` manifests yourself. The Hub places every file in the correct location for the Revit, PlanSwift or ArchiCAD version you choose.

ONE PC AT A TIME

Most ADLM subscriptions are licensed to a single computer. Installing on a second PC will ask an administrator to release the first one — see Chapter 11 on page 18.

CHAPTER 2

Installing the Hub on your PC

This happens once. After it is installed, the Hub itself keeps everything else on your machine up to date.

1 Double-click `ADLMInstallerHubSetup.exe`

If Windows shows a blue “Windows protected your PC” screen, click **More info**, then **Run anyway** — this appears for newly published installers.

2 Approve the Windows administrator prompt

Windows asks for permission because the Hub writes plugins into shared program folders. Click **Yes**.

3 Follow the setup wizard

Accept the default install location unless you have a reason to change it, then click **Install**.

4 Launch the Hub

A desktop shortcut and Start-menu entry named **ADLM Installer Hub** is created. Windows will ask for administrator approval each time the Hub starts.

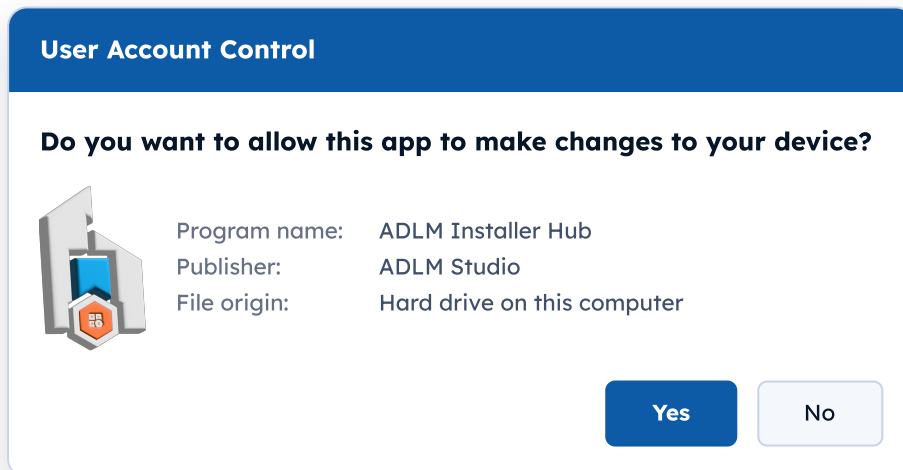


Figure 1. The Windows administrator prompt. You will see this when setup runs and every time the Hub starts. Click **Yes** — the Hub needs it to write plugin files into Revit, PlanSwift and Program Files folders.

IF THE YES BUTTON IS GREYED OUT

Your Windows account is a standard user, not an administrator. Ask whoever manages the PC to run the Hub, or to grant your account administrator rights. The Hub cannot install plugins without it.

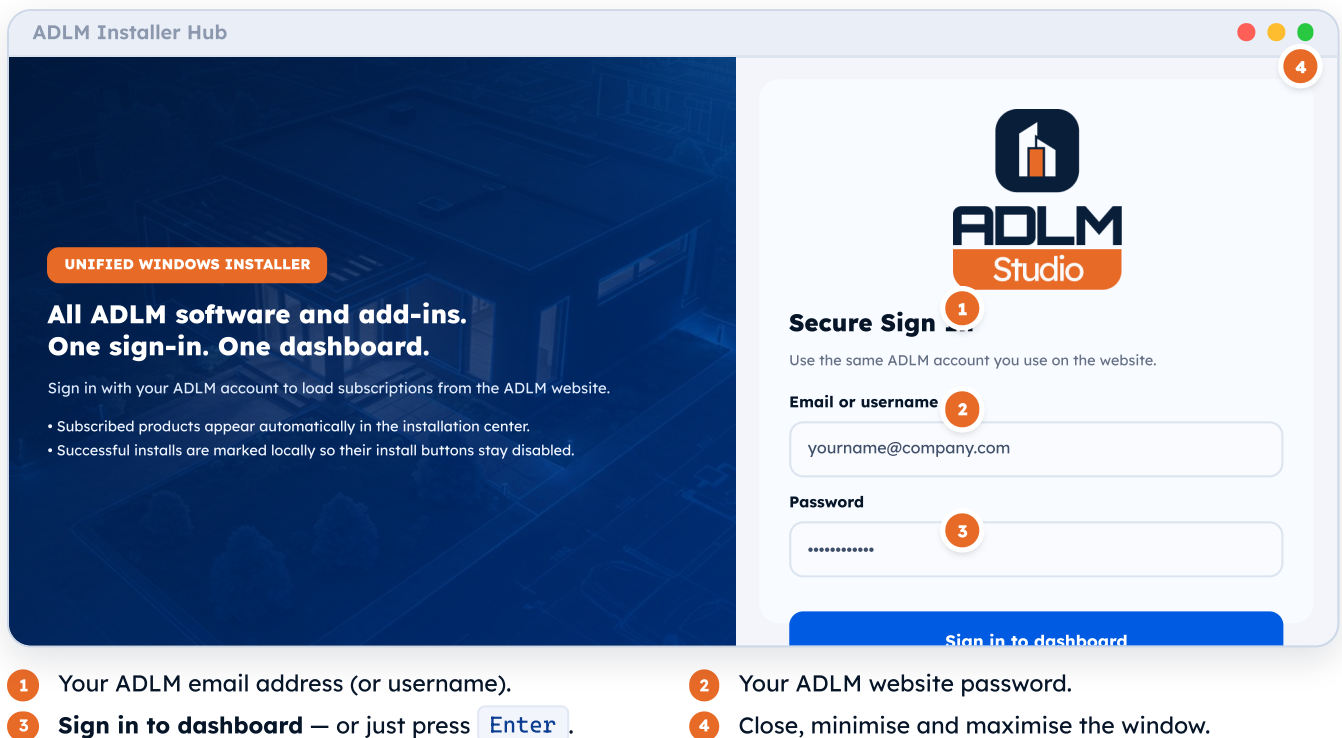
WORKING IN AN OFFICE WITH MANAGED PCS?

Your IT team can install the Hub once for all users. Send them this guide — the Hub uses standard Windows installation locations and needs no special network configuration beyond outbound HTTPS access to the ADLM servers.

CHAPTER 3

Signing in

The first screen you see is **Secure Sign In**. Use exactly the same credentials you use on the ADLM website — there is no separate Hub account to create.



- 1 Your ADLM email address (or username).
- 2 Your ADLM website password.
- 3 **Sign in to dashboard** — or just press **Enter**.
- 4 Close, minimise and maximise the window.

Figure 2. The sign-in screen. The button stays disabled until both fields contain text.

What happens after you sign in

A thin progress bar appears while the Hub contacts the ADLM server. In a few seconds it:

- loads every product tied to your account, with licence and expiry details;
- checks what is already installed on this PC and marks those products as installed;
- compares installed versions against the latest published versions and flags any updates;
- opens the dashboard with a welcome message summarising all of the above.

YOU ONLY SIGN IN ONCE

The Hub keeps your session, so next time it opens straight onto the dashboard. Use **Sign out** at the bottom of the sidebar if you share the PC or need to switch accounts.

If sign-in doesn't work

Any problem is shown in red just above the sign-in button. Here is what each message means.

WHAT YOU SEE	WHAT IT MEANS AND WHAT TO DO
Invalid credentials / incorrect email or password	The email or password does not match. Passwords are case-sensitive. Reset yours at adlmstudio.net , then try again — the Hub uses the new password immediately.
Could not reach the server / network or timeout error	The PC could not reach the ADLM servers. Check your internet connection, then click sign in again. On a company network, ask IT to allow outbound HTTPS to the ADLM service.
Nothing happens / button greyed out	One of the two fields is empty. The button only becomes active once both the email and password boxes contain text.
Signed in, but no products appear	Sign-in worked, but the account has no active purchases yet. Check your orders on the website, then click Refresh in the Hub. See also Chapter 5.

Signing in with the right account

If your company bought licences on a shared account, sign in with *that* account — subscriptions belong to the account that made the purchase, not to your personal email. If you are unsure which one it is, ask whoever manages the ADLM subscription, or contact support (page 21).

Your password is never stored in the Hub

It is sent once to the ADLM sign-in service and cleared from memory immediately afterwards. The Hub keeps only a session token, exactly like staying signed in to a website.

Switching accounts

Click **Sign out** at the bottom of the sidebar. The Hub returns to this screen and forgets the session. Products already installed on the PC stay installed.

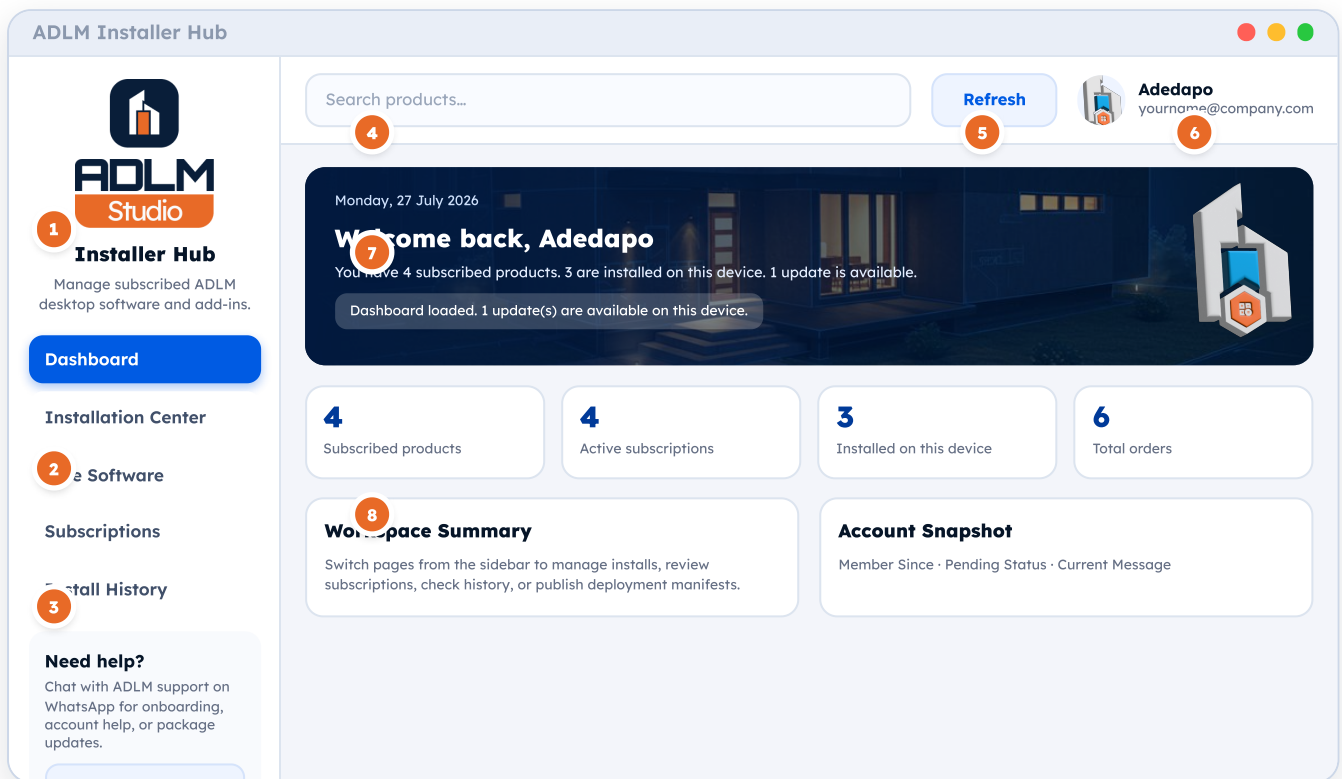
STILL STUCK AFTER THREE ATTEMPTS?

Don't keep retrying — tap **Chat on WhatsApp** or **Raise a ticket** from the sidebar once you are in, or reach support directly using the details on page 21. Include the exact red message text; it tells us straight away whether the problem is the password, the network or the subscription.

CHAPTER 4

A tour of the dashboard

The dashboard is your home base. The sidebar on the left switches pages; the bar across the top searches, refreshes and shows who is signed in.



1 Page menu — switches the main area between pages.

3 Dark mode and **Sign out**.

5 Refresh — re-reads your account from the server.

7 Welcome banner with today's status message.

2 Need help? — WhatsApp chat and support tickets.

4 Search — filters products by name as you type.

6 Who is signed in, with the account email.

8 Counters for your account and this PC.

Figure 3. The dashboard home page immediately after sign-in.

What each page is for

PAGE	USE IT TO...
Dashboard	See a welcome summary: how many products you are subscribed to, how many are installed on this PC, and whether any updates are waiting.
Installation Center	Install, update, repair and hide your purchased products. This is where you will spend most of your time — see Chapter 5.
Free Software	Install or download free ADLM tools, templates and utilities. No subscription needed.
Subscriptions	Check licence status, expiry dates and billing notes for everything on your account.
Install History	See what was installed on this PC, when, and anything still waiting on an administrator.
Admin Studio	Only visible to ADLM administrators. If you don't see it, you don't need it.

The four counters

Subscribed products

Everything your account has bought, whether or not it is installed here.

Active subscriptions

Of those, how many are currently in force and not expired.

Installed on this device

How many are installed on *this* PC. Installing on another PC does not change this number.

Total orders

How many purchases are recorded against the account.

Search and Refresh

Search filters the visible products as you type — useful once you have several products. Clear the box to see everything again.

Refresh re-reads your account from the ADLM server. Use it after buying something new, after renewing a subscription, or when a product you expect is missing. It also re-checks the installed versions on this PC, so it is the fastest way to make a newly published update appear.

A "SHOW N HIDDEN" BUTTON MAY APPEAR

If you have hidden any products (page 15), a button next to the search box offers to bring them all back. It only appears when something is actually hidden.

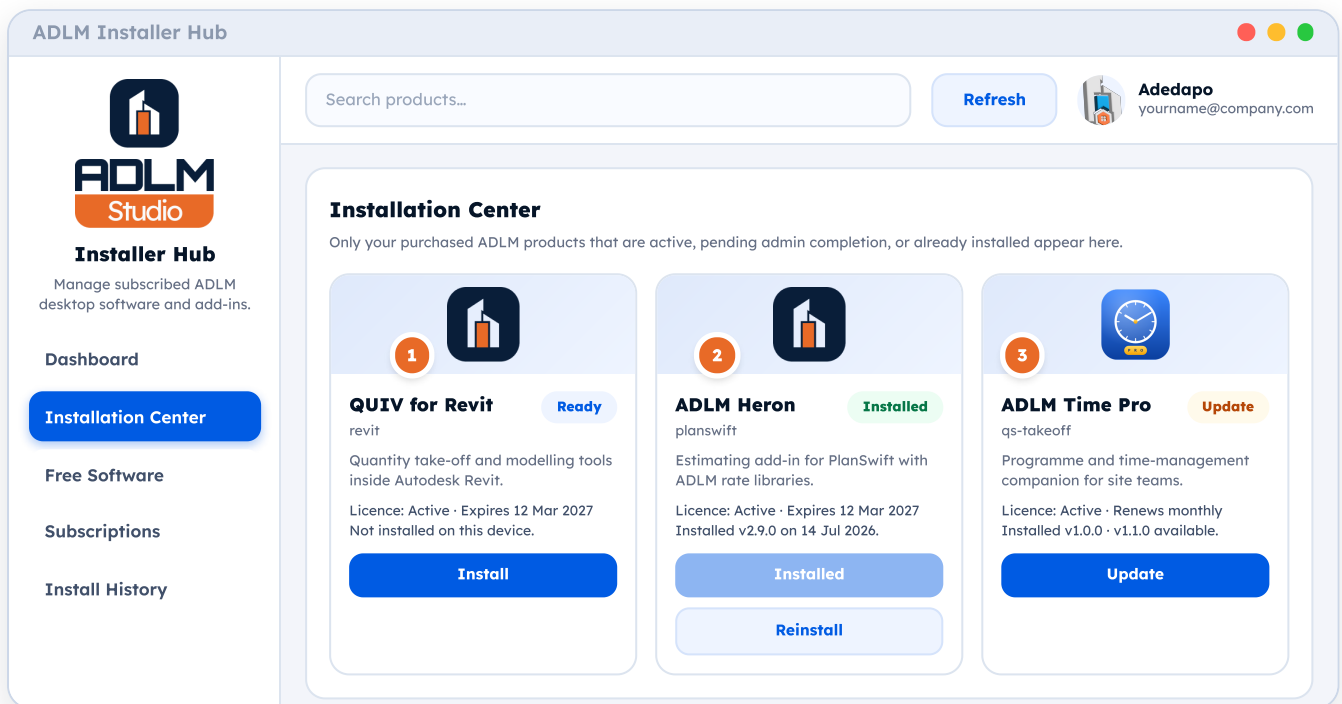
THE WINDOW IS RESIZABLE

Drag the edges, or use the green button at the top right to maximise. You can also drag the thin divider between the sidebar and the main area to make the menu narrower or wider.

CHAPTER 5

The Installation Center

Click **Installation Center** in the sidebar. Every product you have purchased appears as a card. Products you have not bought are never shown here.



- 1 Bought, not yet installed here — button reads **Install**.
- 2 Already installed and current — **Installed** plus a **Reinstall** option.
- 3 A newer version exists — button reads **Update**.

Figure 4. The Installation Center with three products in three different states.

NOTHING HERE YET?

You will see: *"No purchased products are ready for installation on this account yet."* That means the account has no active purchase. Click **Refresh**; if it persists, check your orders on the website or contact support.

Reading a product card

Every card carries the same information in the same place.

The figure illustrates the components of a product card in the Installation Center, with numbered callouts explaining each part:

- 1 Name and product key.** The key (`revit` , `planswift` , `qs-takeoff`) is the internal identifier — quote it when contacting support.
- 2 Status badge.** A one-word summary of where this product stands — see the table below.
- 3 Licence, expiry and billing.** Read straight from your account. If the expiry date looks wrong, click **Refresh** first.
- 4 Main action button.** Its wording always tells you exactly what will happen next.
- 5 Hide.** Removes the card from your view without touching the licence or the installed files.

The card itself displays the following information:

- Product Icon:** A stylized building icon.
- Product Name:** QUIV for Revit
- Status Badge:** Ready
- Product Key:** revit
- Description:** Quantity take-off and modelling tools inside Autodesk Revit.
- Licence:** Active subscription
- Expiry:** Expires: 12 March 2027
- Billing:** Annual · Order #10428
- Source:** ADLM deployment package v3.1.6
- Installation Status:** Not installed on this device.
- Action Buttons:** Install (blue), Hide (grey)

Figure 5. Anatomy of a product card in the Installation Center.

Status badge reference

BADGE	BUTTON SAYS	MEANING
Ready	Install	Bought, licence active, package published. Ready to install on this PC.
Installed	Installed (disabled)	Installed here and up to date. Use Reinstall if something is broken.
Update	Update	A newer version has been published. Click to upgrade in place.
Pending	Install	Your purchase is approved but an ADLM administrator still has to confirm completion.
Package pending	Package pending (disabled)	The licence is fine, but no installable package has been published yet. Nothing for you to do — check back later.
Expired	Unavailable (disabled)	The subscription has run out. Renew on the website, then click Refresh .
Inactive	Unavailable (disabled)	The subscription is not currently active — usually payment or an account hold. Contact support.

CHAPTER 6

Installing a product, step by step

The whole thing is one click plus, for Revit plugins, one dropdown. Most installs finish in well under two minutes.

1 Open the Installation Center

Click it in the sidebar. Find the product card you want.

2 Close the host application first

If you are installing a Revit, PlanSwift or ArchiCAD plugin, fully close that program now. Windows will not let the Hub replace files that a running program has open.

3 Click **Install**

The card immediately switches to the progress view. Nothing else is required from you unless the plugin needs a version choice.

4 Choose your Revit version, if asked

Only for Revit plugins, and only if you have more than one year of Revit installed. See Figure 6.

5 Wait for **Complete**

The card returns to normal and now reads **Installed**.

The Revit version prompt

Revit changes how add-ins are loaded from year to year, so the Hub needs to know which one you use. It detects the Revit versions on your PC and offers them in a dropdown; if you have exactly one, it skips this dialog entirely and uses it.

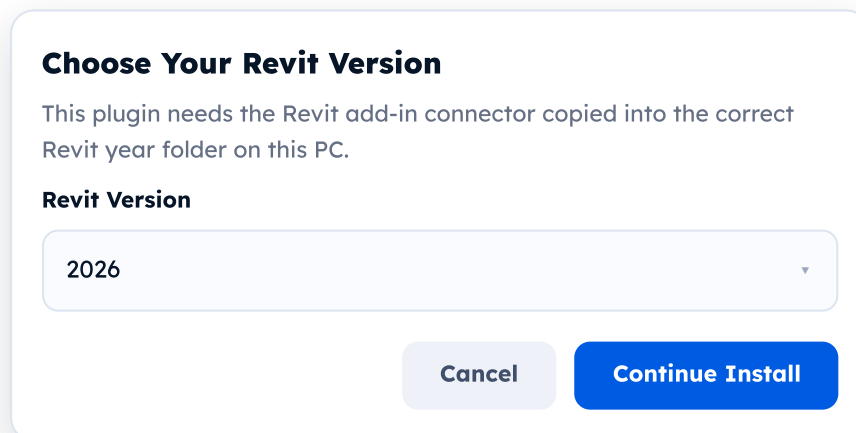


Figure 6. The Revit version dialog. Pick the year of Revit you actually work in, then click **Continue Install**. PlanSwift, RateGen and Time Pro never show this step.

YOU CAN TYPE A YEAR THAT ISN'T LISTED

The dropdown is editable. If your Revit installation was not detected automatically, type the four-digit year (for example `2025`) and continue.

INSTALLING FOR SEVERAL REVIT YEARS

Run the install once per year: install for 2025, then click **Reinstall** and choose 2026. Each run adds the connector for that year without removing the others.

Watching the progress

While an install runs, the card is covered by a progress panel showing a bar, the current step, a detail line and a percentage. A **Cancel** button is available for as long as it is safe to stop.

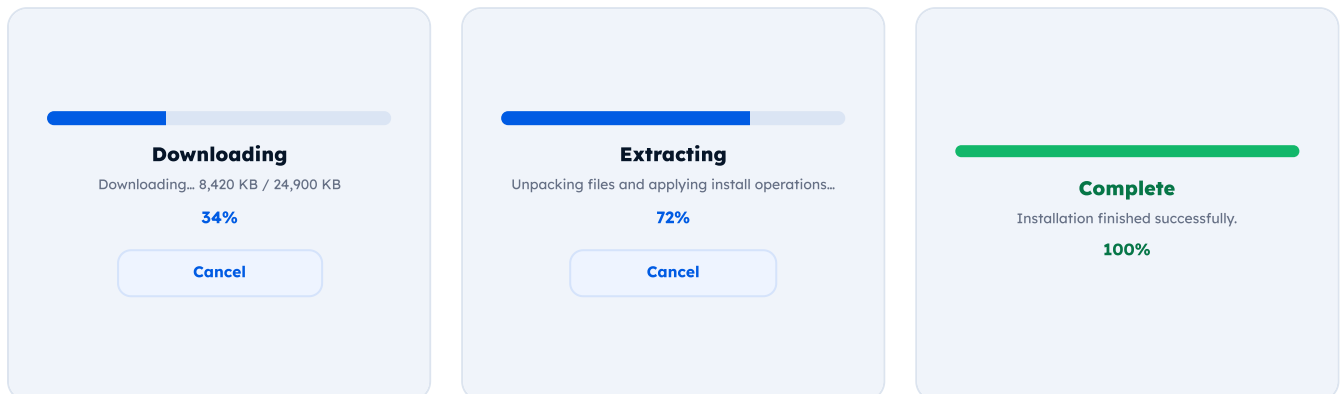


Figure 7. Three moments during an install: downloading, extracting, and finished. The panel sits on top of the product card and disappears when the install completes.

What the steps mean

STEP	WHAT IS HAPPENING
Preparing	Checking your licence, this device, and where the package should go.
Downloading / Downloaded	Fetching the package from the ADLM server. The detail line shows kilobytes transferred.
Cached	The package was already downloaded earlier and is being reused — this makes reinstalls very fast.
Retrying	The download hiccuped. The Hub retries automatically, up to three times. Just wait.
Verifying	Checking the package is complete and untampered before anything is written to your PC.
Extracting / Extracted	Unpacking the files.
Cleaning / Cleanup	Removing older versions of the same product so they cannot conflict with the new one.
Running / Launching	Applying the final install operations, and starting the app if the product asks for it.
Complete	Done. The card flips to Installed .

CANCELLING IS SAFE

If you click **Cancel**, the Hub stops cleanly and leaves your PC as it was. Click **Install** again whenever you are ready — it picks up from the cached download where it can.

After the install finishes

Revit and ArchiCAD plugins

Start Revit (or ArchiCAD). The ADLM ribbon tab appears automatically — plugins load when the program starts, so a program that was already open must be closed and reopened.

ADLM Heron (for PlanSwift)

Open **ADLM Heron** from the Start menu and sign in — signing in is what activates the takeoff templates. Then start PlanSwift and the ADLM template library appears. Part Two picks this up in detail on page 23.

Standalone apps (RateGen, Time Pro)

A desktop shortcut and Start-menu entry is created. Some products launch themselves the moment installation completes.

The Hub itself

The card now reads **Installed**, the “Installed on this device” counter goes up by one, and an entry appears in **Install History**.

If the install fails

The progress panel shows the error instead of **Complete**, and your PC is left in its previous state. Work through these in order:

1 Click Install again

Most failures are transient — a dropped connection or a file briefly locked by another program. A second attempt usually succeeds.

2 Close the host application

“Access denied” or “file in use” almost always means Revit, PlanSwift or the ADLM app is still running. Close it completely (check the Windows system tray) and retry.

3 Check the message against Chapter 13

Page 20 lists every common message and its fix.

4 Send us the exact wording

Use **Chat on WhatsApp** or **Raise a ticket** and include a screenshot. The step name and detail line tell us immediately where it stopped.

ANTIVIRUS SOFTWARE CAN BLOCK INSTALLS

Some security products quarantine newly downloaded plugin files. If installs consistently fail at **Extracting** or the plugin vanishes after installing, add the ADLM install folders to your antivirus exclusions, or ask your IT team to do so, then reinstall.

NOTHING IS LEFT HALF-FINISHED

The Hub verifies each package before writing anything, and cleans up after a failure. A failed install cannot leave a partly-installed plugin that breaks Revit.

CHAPTER 7

Updating a product

Updates work exactly like installs, and you never have to uninstall anything first.

How you find out an update is waiting

- The welcome message on the dashboard says how many updates are available on this device.
- The product's badge changes from **Installed** to **Update**.
- The main button changes from **Installed** to **Update** and becomes clickable again.

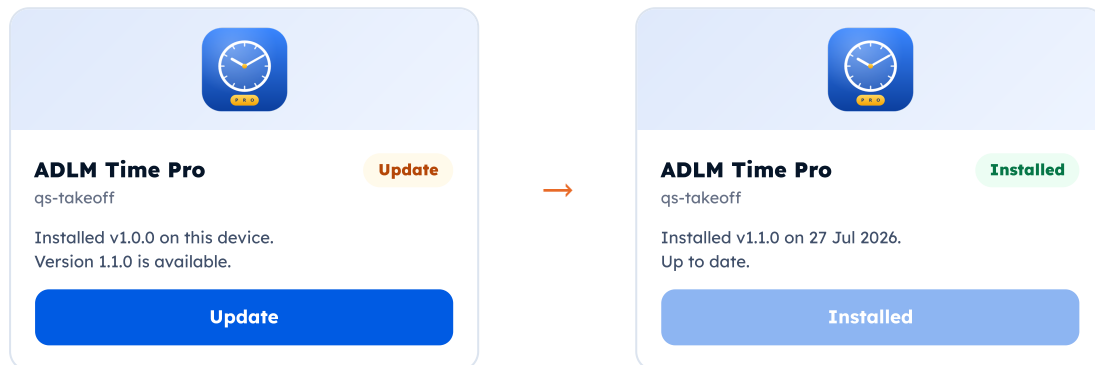


Figure 8. Before and after an update. One click on **Update** replaces the old version in place.

Updating, step by step

1 Close the host program

Revit, PlanSwift or the ADLM app being updated must not be running.

2 Click Update on the card

Same progress panel as a fresh install. The Hub removes the old version during the **Cleaning** step, then installs the new one.

3 Reopen the program

Your ribbon, toolbar or app now runs the new version.

YOUR WORK AND SETTINGS ARE KEPT

Updating replaces program files only. Projects, saved rates, templates and preferences are not touched.

NOT SEEING AN UPDATE YOU WERE TOLD ABOUT?

Click **Refresh** at the top of the dashboard. The Hub re-checks published versions against what is installed on this PC and the badge will change if an update is genuinely available.

CHAPTER 8

Reinstall, repair, hide and restore

Reinstall — the repair button

When a product is installed and up to date, a secondary **Reinstall** button sits under the main button. It reinstalls the same version from scratch. Use it when:

- the plugin no longer appears in Revit, PlanSwift or ArchiCAD;
- files were deleted, quarantined by antivirus, or damaged;
- a desktop shortcut is missing;
- you want to add the plugin for a *second* Revit year (choose the other year when prompted).

Reinstalling is safe and, because the package is usually already cached on your PC, it is fast. It does not consume an extra licence.

Hide and restore

If your account carries products you never use on this PC, **Hide** tidies them away.

To hide a product

Click **Hide** at the bottom of the card. It disappears from your view immediately. The licence is untouched, and anything already installed keeps working.

To bring them back

A **Show N hidden** button appears next to the search box whenever something is hidden. Click it to restore every hidden product at once.

HIDE IS NOT UNINSTALL

Hiding only affects what you see in the Hub. To remove a product from your PC, use **Apps & features** in Windows Settings, or contact support if the product has no uninstaller.

When the button is greyed out

BUTTON READS	WHY IT CANNOT BE CLICKED
Installed	Already installed and current. Use Reinstall if you need to repair it.
Installing...	An install is running on this card right now.
Package pending	No installable package has been published for this product yet.
Unavailable	The subscription is expired or inactive. Renew, then click Refresh .

CHAPTER 9

Free Software

The **Free Software** page carries free ADLM tools, templates and utilities. No subscription and no purchase is required — being signed in is enough.

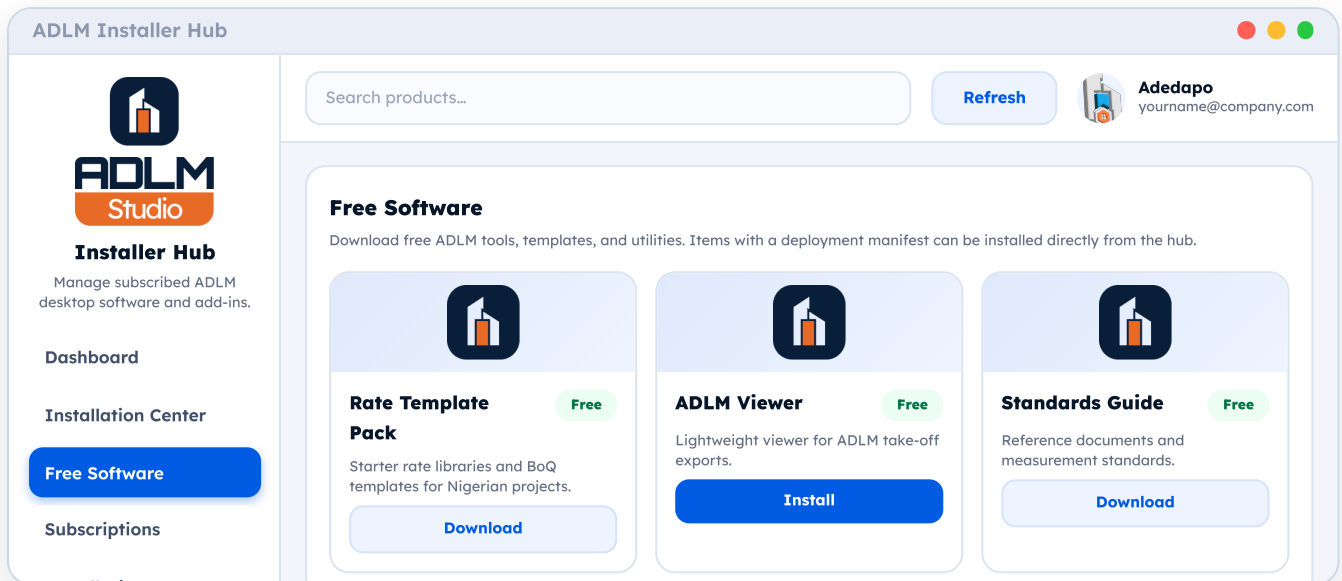


Figure 9. The Free Software page. Items packaged for the Hub show **Install**; everything else shows **Download**.

Install

Behaves exactly like a paid product: progress panel, admin prompt if needed, then **Installed**.

Download

Opens the file in your browser and saves it to your Downloads folder. Open it from there.

FREE TOOLS MAY BECOME PAID PRODUCTS

Some tools start free and later move to a subscription. If a formerly free tool now asks for a subscription, it will appear on the **Installation Center** page instead, and you will find its pricing on the ADLM website.

CHAPTER 10

Subscriptions & Install History

Subscriptions

A plain list of everything on your account with its licence state, expiry date and billing note. Nothing is installed from this page — it is for checking what you own and when it runs out.

Subscriptions
Review licence status, expiry dates, and billing notes for all software tied to this account.

QUIV for Revit revit Licence: Active annual subscription · Expires 12 March 2027 · Order #10428	Installed
ADLM RateGen rategen Licence: Expired 30 June 2026 · Renew to reactivate	Expired

Figure 10. The Subscriptions page — one row per product on your account.

Install History

What was installed on *this* PC, which version, when, and where the package came from. Also lists anything still waiting on an ADLM administrator to confirm.

Install History
Track completed installs and pending admin confirmations for software tied to this account.

ADLM Heron Installed v2.9.0 on 14 July 2026 · ADLM deployment package	Installed
Excel Add-in Bridge Approved — awaiting administrator completion	Pending

Figure 11. The Install History page.

HANDY FOR SUPPORT

Screenshot this page when reporting a problem — it tells us the exact version you are running.

CHAPTER 11

Licences and your device

Most ADLM subscriptions are licensed to one computer. The first time you install a product, that subscription is registered to the PC you installed it on.

What this means day to day

- Install, update and reinstall as often as you like *on that PC* — it never counts against you.
- Signing in on another computer works fine, and you can browse everything; installing there is what needs the licence to move.
- Moving to a new PC is a one-off request to an ADLM administrator, not a repurchase.

The message you will see on a second PC

BOUND TO ANOTHER DEVICE

"[Product] is bound to another device. Contact admin to revoke the existing device or increase seat count."

This is not an error in the Hub — it is the licence protecting your purchase. Nothing is installed and nothing is lost.

Moving your licence to a new computer

1 Contact ADLM support

Use **Chat on WhatsApp** or **Raise a ticket** from the sidebar, or the details on page 21.

2 Give them your account email and the product name

That is all they need to find the registration.

3 Ask them to release the old device

An administrator clears the previous registration from the ADLM back office.

4 Click Refresh, then Install

On the new PC, refresh the dashboard and install as normal. The licence registers to the new machine.

NEED SEVERAL PEOPLE USING IT AT ONCE?

Ask about additional seats. Each seat allows one more computer, and the Hub then installs on each of them without any manual release.

REFORMATTING OR REPLACING A PC?

Tell support *before* you wipe the machine if you can — releasing the device first makes reinstalling on the rebuilt PC completely seamless.

CHAPTER 12

Dark mode, sign out and settings

Two buttons sit at the very bottom of the sidebar: the theme switch and **Sign out**.

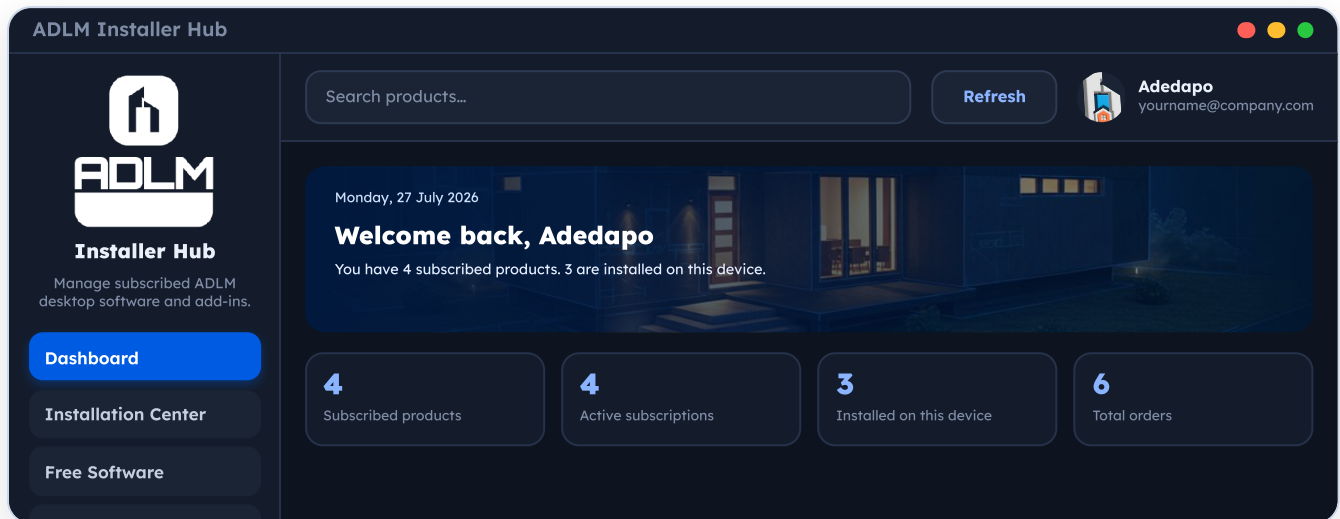


Figure 12. The Hub in dark mode. The button label always shows what you will switch to: **Dark mode** when you are in light, **Light mode** when you are in dark.

Dark mode

Click once to switch the whole Hub. The choice is remembered the next time you open it.

Sign out

Returns to the sign-in screen and forgets the session. Installed products keep working; nothing is uninstalled.

CLOSING VERSUS SIGNING OUT

Closing the window with the red button leaves you signed in, so the Hub opens straight onto the dashboard next time. Use **Sign out** only when you are handing the PC to someone else or switching accounts.

CHAPTER 13

Troubleshooting

Almost everything below is self-resolving. Work down the "What to do" column before contacting support.

SYMPTOM OR MESSAGE	WHAT TO DO
My product isn't on the dashboard	Click Refresh . If it still isn't there, the subscription may not be active yet — check your orders on adlmstudio.net . Also check whether you hid it: look for a Show N hidden button.
Install stalls or fails midway	Click Install again. The Hub reuses the cached download and picks up cleanly; it never leaves a half-installed product behind.
"Package integrity check failed"	The download was corrupted in transit. Retry — the Hub discards the bad file and fetches a fresh copy.
"Access denied" during install or update	The program being updated is still running. Close Revit / PlanSwift / the ADLM app completely (check the system tray) and retry.
Revit can't see the plugin	Confirm you chose the correct Revit year during install, then fully close and reopen Revit — plugins load at startup. If it is still missing, click Reinstall and pick the right year.
"Bound to another device"	The licence is registered to a different PC. Ask support to release it — see Chapter 11 on page 18.
Button reads "Package pending"	Your licence is fine but the installable package has not been published yet. Nothing to do; check again later or ask support for a timeline.
Button reads "Unavailable"	The subscription is expired or inactive. Renew on the website, then click Refresh in the Hub.
The Hub won't start / no admin prompt	Right-click the shortcut and choose Run as administrator . If the prompt is refused, your Windows account lacks administrator rights — ask whoever manages the PC.
Downloads are very slow	Packages can be tens of megabytes. Leave it running; the Hub retries automatically up to three times if the connection drops.
Plugin disappears after working fine	Usually antivirus quarantine or a host-application update. Click Reinstall , and add the ADLM install folders to your antivirus exclusions.
Wrong name or email in the top-right	You are signed in with a different ADLM account. Click Sign out and sign back in with the account that holds the subscriptions.

THE SINGLE MOST EFFECTIVE FIX

Close the host application, click **Refresh**, then click **Install** or **Reinstall** again. That resolves the large majority of reported problems.

CHAPTER 14

Quick reference

First install, in six clicks

- Open the Hub → approve the Windows prompt
- Enter email and password → [Enter](#)
- Sidebar → **Installation Center**
- Close Revit / PlanSwift first
- Card → **Install**
- Choose your Revit year → **Continue Install**

What the button is telling you

- **Install** — ready to go
- **Update** — newer version available
- **Installed** — done and current
- **Installing...** — in progress
- **Package pending** — not published yet
- **Unavailable** — expired or inactive licence

When something looks wrong

- Click **Refresh** — fixes most stale data
- Close the host program, then retry
- **Reinstall** repairs a broken install
- **Show N hidden** brings back hidden cards
- Retrying is always safe

Where things live

- **Dashboard** — summary and counters
- **Installation Center** — install and update
- **Free Software** — free tools
- **Subscriptions** — licences and expiry
- **Install History** — versions and dates

Getting help

Both buttons are in the **Need help?** card in the sidebar, and both open with your account details already attached, so you don't have to explain who you are.

Chat on WhatsApp

Fastest route for anything urgent — a stuck install, a licence that needs releasing, or a question about which product you need. Opens WhatsApp with a pre-filled message.

Raise a ticket

Opens the ADLM support form in your browser. Best for anything that needs a written trail: billing queries, seat changes, or a bug report with screenshots.

WHAT TO INCLUDE WHEN YOU REPORT A PROBLEM

The product name and key (for example [revit](#)), the exact wording of any message, the step it stopped on, and your Revit / PlanSwift version. A screenshot of the card and of the **Install History** page usually answers all of it at once.

Part One complete

Every ADLM product on your PC, installed and current. Part Two picks up from here — open PlanSwift and turn drawings into a priced bill.

adlmstudio.net
[Chat on WhatsApp](#)
[Raise a ticket](#)



PART TWO

Taking off in PlanSwift

Part One got the software onto your PC. Part Two is the work itself — opening a job, getting the drawing to scale, measuring with the ADLM template tree, and turning those measurements into a priced bill.

5 · Set up the job

6 · Scale the drawing

7 · Measure

8 · Price & export

CHAPTER 15

Heron at a glance

ADLM Heron is two things working together: a **template library** that lives inside PlanSwift and does the measuring, and the **Heron window** that reads those measurements and turns them into quantities, budgets and bills.

Inside PlanSwift — the template tree

A folder called **Complete ADLM TakeOff Plugin** appears in the *Templates, Parts, Inputs* panel. Every trade you measure — substructure, frame, blockwork, finishes, roofing, services — is a ready-made template item that already knows its own unit and formula.

Alongside PlanSwift — the Heron window

A separate ADLM window with its own sidebar: **Dashboard, Quantity Take Off, Budget, Steel Tonnage, Specifications** and **Connect Excel**. It reads the live job out of PlanSwift — you never re-type a quantity.

What the Hub actually installed

WHAT	WHERE IT GOES
Heron application	Its own program folder, with a Start-menu shortcut. This is the window you open alongside PlanSwift.
The ADLM template library	Into every PlanSwift installation found on the PC. If you run PlanSwift 10 and 11 side by side, both get the templates.
A protected master copy	A separate folder Heron restores templates from if PlanSwift loses or corrupts them, so a bad job never costs you the library.
The Excel add-in	An ADLM Takeoff Link pane inside Excel, registered for your Windows account. Covered in Chapter 27.

PLANSWIFT MUST BE CLOSED WHILE THE HUB INSTALLS

The templates are written into PlanSwift's own folders. If PlanSwift is open, Windows locks those files and the install reports *Access denied*. Close PlanSwift completely — check the notification area — then click **Install** again.

The order of operations

Getting these five steps in the right order is the difference between everything working first time and an afternoon spent wondering where the templates went.

1 Install from the Hub with PlanSwift closed

See Chapter 6 on page 11.

2 Open Heron and sign in

Signing in is what unlocks the templates. Until you do, PlanSwift shows nothing new.

3 Restart PlanSwift

PlanSwift reads its template library once, at startup. After a restart the **Complete ADLM TakeOff Plugin** tree is there.

4 Open or create your job, and scale the drawings

Chapters 17 and 18 — the single most important step in the whole process.

5 Measure, then read the results in the Heron window

Chapters 19 to 24.

YOU ONLY DO STEPS 1 – 3 ONCE

From then on your day starts at step 4: open PlanSwift, open Heron, and work.

What Heron puts on your PC

Worth knowing so you can tell Heron's own files apart from your work.

WHAT	NOTES
The Heron application	Installs into its own program folder with a Start-menu shortcut.
The template library	Added to PlanSwift's own template store so it appears in the <i>Templates, Parts, Inputs</i> pane. Your existing PlanSwift templates are left alone.
A protected reference copy	Heron keeps its own copy of the library and restores it automatically if PlanSwift ever loses it. Nothing for you to manage.
Your sign-in and preferences	Held locally so you are not asked to sign in every session. Your password itself is never written to disk.
Your takeoff	Lives inside the PlanSwift job file. Heron keeps nothing of your work locally that is not either in the job or in your ADLM cloud account.

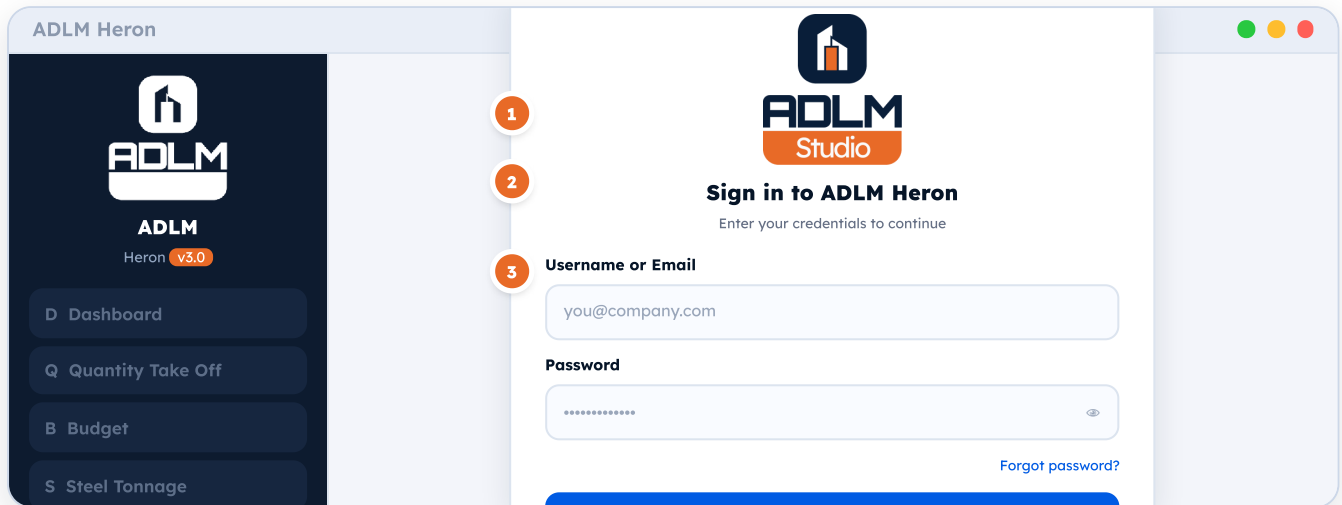
BACK UP THE JOB, NOT HERON

Everything you produce — measurements, specifications, folder structure — lives in the PlanSwift job. Copy that file and your work is safe; Heron itself can always be reinstalled from the Hub.

CHAPTER 16

Signing in to Heron

Heron signs in with the same ADLM account as the Hub. This sign-in does more than identify you — it is what activates the template library inside PlanSwift.



- 1 The same email you use at adlmstudio.net and in the Hub.
- 2 Click the eye to check what you typed before submitting.
- 3 Or just press **Enter** — the button is the default action.
- 4 The sidebar stays greyed out until sign-in succeeds.

Figure 16.1 — Heron's sign-in screen. Your password is sent to the ADLM server and never written to disk on this PC.

What happens the moment you sign in

- 1 **Your licence and device are checked**
Heron confirms the subscription is active and that this PC is the device the licence is bound to.
- 2 **The templates are activated**
The ADLM template folder is written into every PlanSwift installation on the PC and switched on.
- 3 **The sidebar comes alive**
Dashboard is enabled immediately; the takeoff tabs switch on once a project is active.

After sign-in

IF THE MESSAGE SAYS "RESTART PLANSWIFT"

Do exactly that — close PlanSwift completely and open it again. PlanSwift only reads its template library at startup, so the ADLM tree cannot appear in a session that was already running.

You will see one of three confirmations, depending on what Heron found:

MESSAGE	WHAT IT MEANS
ADLM Plugin activated successfully	First activation on this PC. The templates were installed. Restart PlanSwift.
ADLM templates restored. Please restart PlanSwift to see them.	The templates had gone missing — typically after signing out, or after a PlanSwift update — and have been rewritten from the protected master copy.
Welcome, <i>your name</i>	Everything was already in place. Carry on; no restart needed.

If your account includes RateGen, your saved rates and material prices download in the background at this point, ready for pricing in Chapters 24 and 25.

Staying signed in, and being signed out

Sessions last 10 days

After that you see *Your session has expired* and sign in again. This is normal, not a fault.

Offline sessions

With no internet you may be signed in from a cached session. A banner reads *Offline session — sign in again for cloud features*. Measuring works; cloud save does not.

Signing out hides templates

Sign Out reports that PlanSwift templates will be hidden on next restart. That is deliberate — sign back in to restore them.

DON'T SIGN OUT AT THE END OF A WORKING DAY OUT OF HABIT

There is no benefit, and it costs you a PlanSwift restart tomorrow. Just close the window.

The connection indicator

Top right of the Heron window sits a coloured dot with a word beside it. Click it at any time to re-check.

INDICATOR	MEANING
Online (green)	Connected to the ADLM cloud. Cloud save, rates and projects all available.
Server unreachable (amber)	Your internet is up but the ADLM server is not responding. Keep working; save to cloud later.
No internet (red)	Cloud features are unavailable. Everything local — measuring, breakdowns, Excel export — still works.

CHAPTER 17

Setting up the job

Everything Heron reads comes out of the **job** that is open in PlanSwift — its pages, its takeoff items and its folders. Time spent organising the job here is repaid many times over when you price it.

Creating the job

PlanSwift walks you through this as a short wizard. Everything you set can be changed later except one thing worth getting right first time — the measurement system.

1 Home → New Job

The **Job Properties** screen opens.

2 Fill in the job properties

Job number, description and any notes, then choose the storage location and set the measurement type to **Metric** or **English**. Put the client or project name in the description — Heron offers it as the default project name when you save. Click **Next**.

3 Point PlanSwift at your drawings

Browse to the folder holding the plans. Everything it finds is listed; use **Check All**, or tick just the sheets you need. Click **Next**.

4 Choose the conversion options

Letting PlanSwift convert PDFs to TIF makes large drawings noticeably quicker to pan and zoom. Multi-page PDFs can be split into individual pages here, and **Page Naming** appends the same text to every page name in one go. Click **Next**.

5 Check the summary, then Finish

The **Ready to Create Job** screen shows what is about to happen. PlanSwift then copies and converts the drawings into the job's own data store — your original files are left exactly as they were.

CHOOSE METRIC OR ENGLISH AT STEP 2

This is the job's measurement system, and it drives the units your drawings report — which is in turn what Heron reads to decide whether to work in metric or imperial. It is much easier to set now than to change once you have measured.

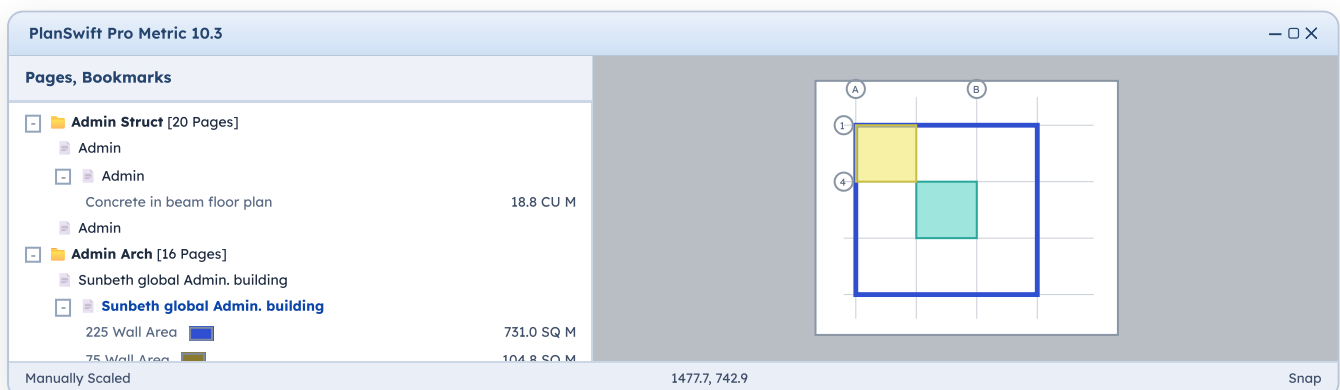


Figure 17.1 — Pages, Bookmarks with the job's drawings grouped into folders. Measurements made on a page hang underneath it, each with its colour swatch and running quantity.

Organising the pages before you measure

Rename, group and order your pages *before* taking anything off. On a forty-sheet job it is the difference between finding a drawing in two seconds and hunting for it — and because Heron reads your folder structure, it is also how your bill gets its sections.

1 Pages, Bookmarks → New Folder

The **New Page Folder** dialog opens. Name it for the drawing set — *Admin Struct*, *Admin Arch*, *Hostel* — and click **OK**.

2 Drag the pages in

Drag a page until the folder is outlined with a blue box, then release. Drag pages up and down to put the set in a sensible order.

3 Rename every page you will measure on

A page called *Sunbeth global Admin. building* tells you what it is; *Page 7* does not.

NAME PAGES BEFORE YOU MEASURE, NOT AFTER

Page names travel with the takeoff into your bill. Renaming twenty pages once you have measured them is far more work than naming them as you import.

Getting the drawings usable

SITUATION	WHAT TO DO
The sheet is sideways	Rotate the page in PlanSwift before you scale it. Rotating afterwards is harmless, but working on a sideways plan invites mistakes.
One sheet holds several drawings	Crop or split it so each plan sits on its own page. Scale is a per-page property, and a plan and a detail on one sheet rarely share a scale.
You only have a photograph or a scan	It will work, but scan quality decides accuracy. Scale off the longest dimension you can read, and expect to check more of your quantities by hand.
Revised drawings arrive mid-job	Import the revision as a new page rather than replacing the old one, measure it, then delete the superseded page. That way you never lose a takeoff you might need to compare against.

CHAPTER 18

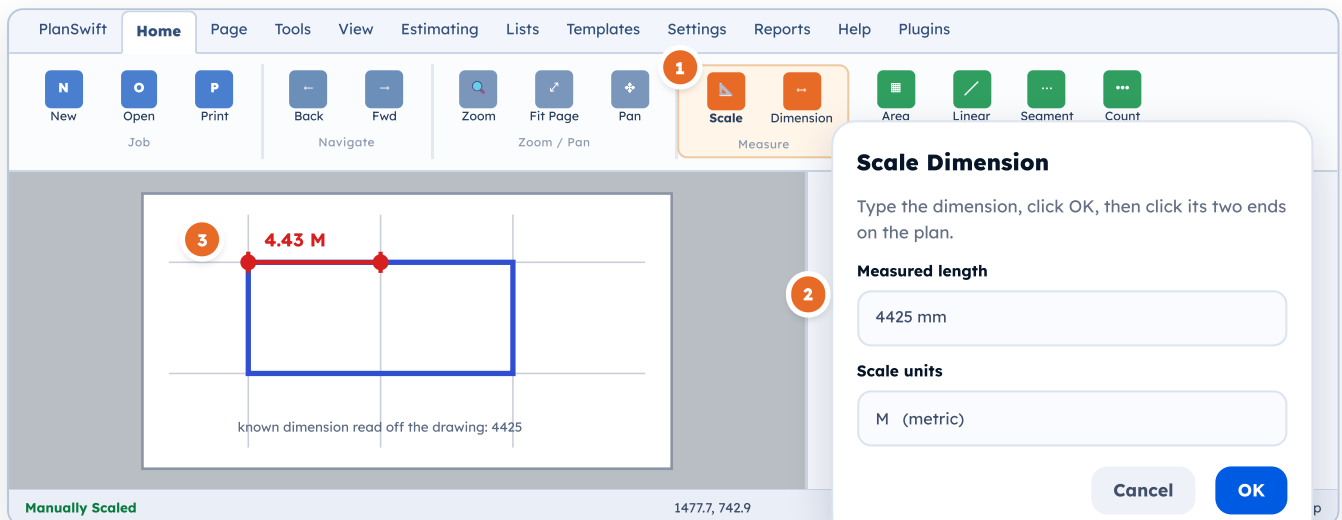
Scaling your drawings

This is the one step that decides whether every number that follows is right or worthless. A PDF has no idea how big the building is — until you tell it, PlanSwift is measuring inches of paper.

SCALE IS SET PER PAGE, NOT PER JOB

Every page you intend to measure on needs its own scale. A page you never scaled will happily give you an area — a wrong one — with no warning beyond the status bar.

The Scale tool



- 1 **Home** → **Scale** — the tool you need, in the Measure group.
- 3 Then click the two ends of that dimension on the plan.

- 2 Type the real length into **Scale Dimension** and click OK.
- 4 The status bar then reads **Manually Scaled**.

Figure 18.1 — Scaling a page from a printed dimension. Zoom right in before clicking: a two-pixel error on a 4-metre grid line is a 20 mm error on every wall you measure afterwards.

Setting the scale, step by step

1 Straighten the image first

If the sheet is rotated or slightly skewed, fix that before you scale. A scale set on a crooked image is wrong on both axes, and correcting the rotation afterwards does not correct the scale.

2 Find a labelled dimension you trust

The longer the better — PlanSwift's own guidance is at least 20 feet, call it 6 metres — because a click error matters proportionally less over a long run. A structural grid dimension is ideal; avoid door and window widths, which are often drawn approximately.

3 Home → Scale

The **Scale Dimension** dialog opens.

4 Type the real length and click OK

Enter it in the drawing's own units — for a 4425 mm grid, or if you are working in metres.

5 Click the two ends of that dimension

Zoom right in first and click the centre of each dimension line end, not near it.

6 Now do the other direction

Repeat the whole sequence on a dimension running the other way. PlanSwift puts an arrow beside the page name in the *Pages* window for each direction you have scaled, so you can see at a glance which pages are finished.

SCALE BOTH DIRECTIONS WHERE YOU CAN

Plotting, scanning and photocopying rarely stretch a sheet equally both ways. Scaling horizontally and vertically is PlanSwift's own recommendation for best accuracy, and it costs another twenty seconds.

How PlanSwift tells you where you stand

WHAT YOU SEE	WHAT IT MEANS
An arrow beside the page name in the <i>Pages</i> window	That page has been scaled in the direction the arrow points. Arrows both ways means you have done both axes.
Manually Scaled in the status bar	This page's scale was set by hand from a dimension you clicked, rather than taken from a preset.
A prompt asking you to set the scale	You started a takeoff on a page with no scale. Set it now — PlanSwift will not let you measure blind.
Nothing at all	The page is unscaled and nothing has been drawn on it yet. Scale it before you start.

Proving the scale before you trust it

Setting a scale takes ten seconds. Checking it takes another ten, and it is the cheapest insurance in the whole workflow.

1 Pick a *different* dimension on the same page

Ideally on the other axis, and far away from the one you scaled with.

2 Home → Dimension, and measure across it

PlanSwift prints the length it thinks that distance is.

3 Compare with the printed figure

Within a millimetre or two on a metric drawing is fine. Ten per cent out means you scaled off the wrong dimension — redo it.

If a page arrives already scaled

Vector PDFs exported from CAD are sometimes correct out of the box. Never assume it — run the Dimension check anyway. Thirty seconds now beats re-measuring a whole floor later.

Copying a scale between pages

Where a set of pages was plotted at the same scale, PlanSwift can apply one page's scale to the others. Still spot-check two or three — plotters and photocopiers are not always faithful.

Choosing a dimension to scale from

GOOD CANDIDATES	POOR CANDIDATES
An overall grid dimension running the full width or length of the building	Anything under a couple of metres — the click error is proportionally large
A dimension string you can read without zooming past the point of blur	Door, window and fitting sizes, which are often drawn nominally
A dimension whose extension lines clearly meet the thing being measured	Dimensions to gridlines where the offset is ambiguous

Using a standard scale instead

Clicking the lower half of the **Scale** button offers the common preset scales, and PlanSwift makes you acknowledge a disclaimer before it applies one: automatic scaling is only ever as accurate as the drawing it is reading. A preset is a reasonable starting point on a clean vector PDF — then verify it exactly as you would a scale you set by hand.

ONE HABIT WORTH FORMING

Scale every page in a set the moment you import it, before you measure anything. Batch the boring work once, then measure with confidence.

Scale units, and why Heron cares

Each page carries a **Scale Units** property — **M**, **MM**, **FT**, **IN**. ADLM Heron reads that property to decide whether to work in metric or imperial, and it does so automatically when your project opens. You will see the result on Heron's Dashboard:

UNITS: METRIC — PLANSWIFT PAGE (M)

"Auto-detected from the active PlanSwift project's Scale Units. Override in Settings → Display Units."

Detection works down a chain: first the page, then the job, then the PlanSwift root, then your last saved preference, and finally metric as a default. So a job full of unscaled pages does not just give you wrong quantities — it can also hand Heron the wrong unit system, which then flows into your material constants and rates.

Common scaling mistakes

WHAT WENT WRONG	HOW YOU FIND OUT, AND THE FIX
Page was never scaled	PlanSwift prompts you the moment you start drawing, so this is usually caught for you. If a page slipped through, the status bar will not say Manually Scaled and quantities look wildly small or large. Scale the page; existing measurements on it update to the new scale.
Scaled off a wrong or unreadable dimension	Everything is out by the same percentage. Catch it with the Dimension check. Re-run Scale — the new scale replaces the old one.
Typed millimetres into a metre field	Quantities out by a factor of 1000. Re-run Scale and enter the length in the units shown in the dialog.
Clicked imprecisely at low zoom	A small, consistent error across the job — the hardest kind to spot. Zoom in until the line is several pixels thick before clicking.
Sheet plotted "not to scale"	The drawing itself cannot be trusted. Measure off a dimensioned sheet instead, or ask the design team for a scaled issue.
Different scales on one sheet	PlanSwift holds one scale per page, so give each scale a page of its own: crop the region out as a new page, or duplicate the page from the <i>Pages, Bookmarks</i> list and crop that. Put the scale in the page name — <i>Wall Sections 1:20</i> — so you can tell them apart later.

RESCALING AFTER MEASURING IS SAFE — BUT CHECK THE RESULT

PlanSwift recalculates existing takeoff on the page against the new scale. Re-open Heron's **Quantity Take Off** tab and click **Reload** so Heron picks up the corrected numbers.

CHAPTER 19

The ADLM template tree

The template tree is the heart of Heron. Instead of drawing a shape and then deciding what it means, you pick what you are measuring first — and the template brings its own unit, colour and formula with it.

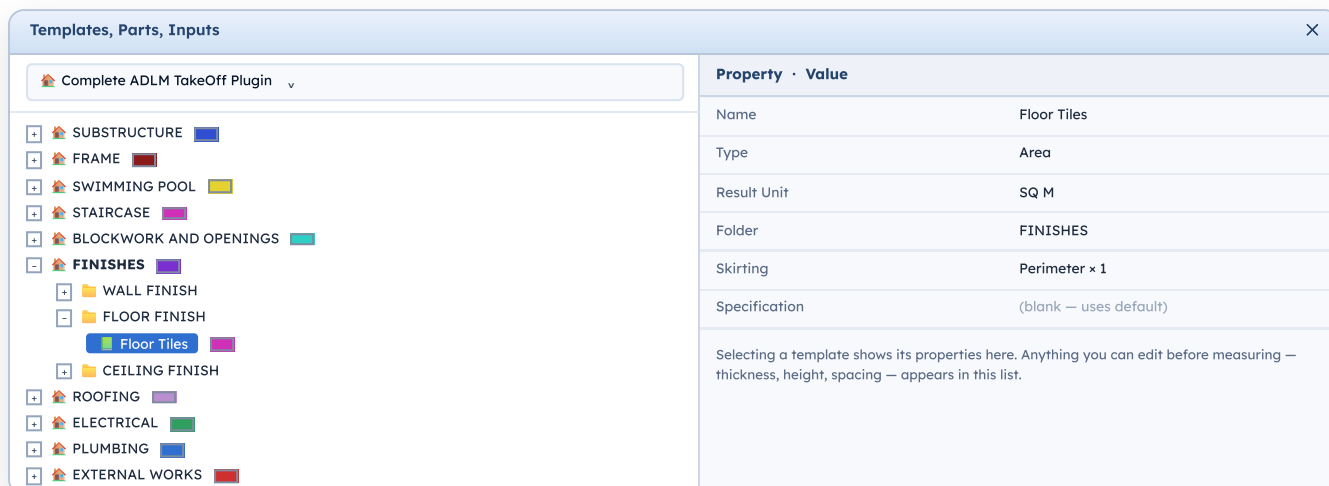


Figure 19.1 — **Templates, Parts, Inputs** with the ADLM library loaded. Trades are the top level; folders group related items; the green items are the templates you actually measure with.

Finding your way around

Pick the library first

The dropdown at the top must read **Complete ADLM TakeOff Plugin**. If it doesn't, open it and choose it.

Expand with the + boxes

Trades open into folders, folders into template items. The coloured bar is the colour that measurement is drawn in.

Children come free

A *Floor Tiles* area also produces its skirting; a wall area produces its rendering and perimeter. You measure once.

IF THE TREE IS EMPTY OR MISSING

Three causes, in order of likelihood: you are not signed in to Heron; you signed in but have not restarted PlanSwift since; or the library went into a different PlanSwift version than the one you have open. Chapter 28 walks through each.

CHAPTER 20

Measuring the drawing

With the page scaled and the template chosen, measuring is the easy part. The rule to remember: **start from the template, then draw**. Launching the takeoff from the template is what tells Heron what your shape means.

The four ways to measure

TOOL	GIVES YOU	USE IT FOR
Area	SQ M / SQ FT	Slabs, wall elevations, floor and ceiling finishes, roof coverings, excavation footprints. Click round the outline and close the shape.
Linear	M / FT	Walls on plan, beams, skirting, kerbs, pipe and cable runs, railing. Click along the run.
Segment	M / FT	A single straight length where you want each leg recorded separately rather than as one continuous run.
Count	Nr	Columns, doors, windows, sanitary fittings, light points, sockets. One click per item.

1 Open the page and check it is scaled

If it isn't, PlanSwift stops and asks you to set the scale as soon as you start drawing.

2 Hover over the template you want

Expand down to the item — for example *FINISHES* → *FLOOR FINISH* → *Floor Tiles*. A small **green button** appears to its left as your cursor passes over it.

3 Click the green button

That is what starts a takeoff *from that template*, rather than a blank measurement. A properties window opens.

4 Name it and click OK

Use the room or element name — *Offices*, *Sick bay*, *Circulation* — and adjust anything else the template offers, such as colour or thickness. The name is what appears in your bill, so type it properly now.

5 Draw the measurement

PlanSwift drops into digitizer record mode, shown by the red **Digitizer Record** button. Click each corner; double-click the last point to close the shape. Right-click and choose **Stop** to finish, or press **Esc** to leave record mode.

MEASURE BY ROOM, NOT BY FLOOR

Five separate *Floor Tiles* areas named *Offices*, *Sick bay*, *Circulation*, *WC* and *Lobby* cost no more effort than one big blob — and they give you a bill you can defend line by line when the client asks.

Watching it add up

The **Takeoff Summary** panel is your running total. Every measurement appears under its folder the moment you finish drawing it, so mistakes surface immediately rather than at pricing time.

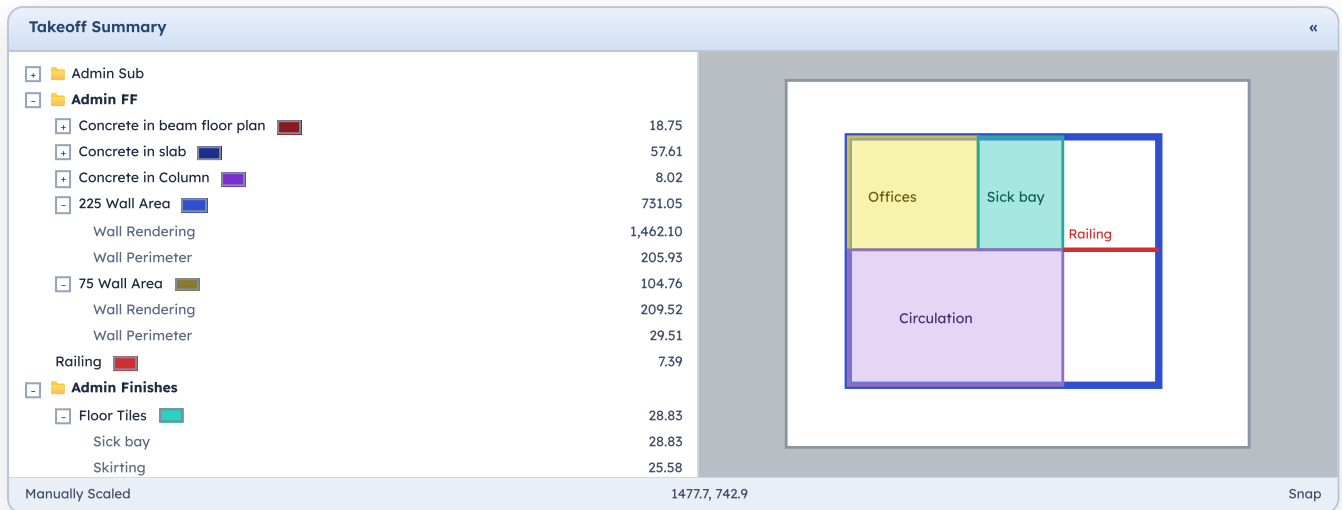


Figure 20.1 — The **Takeoff Summary** panel. Note the indented children: measuring *225 Wall Area* once produced the wall rendering and the wall perimeter with it, and each *Floor Tiles* area brought its own skirting.

COLOUR IS INFORMATION, NOT DECORATION

Each template draws in its own colour, so a glance at the drawing tells you what has been measured and what has been missed. Turn a layer off with the bulb icon beside its row when the plan gets crowded.

Fixing a measurement after the fact

Nothing you draw is final. Every correction below updates the quantity immediately, and flows into Heron the next time you click **Reload**.

TO DO THIS	DO THAT
Adjust a shape	Select the measurement on the drawing and drag any corner point. Add a point by clicking on a segment; remove one by selecting it and pressing Delete .
Rename it	Rename it in the Takeoff Summary. The new name is what appears in your bill — worth doing the moment you spot a typo.
Move it to another folder	Drag the row in the Takeoff Summary onto the folder it belongs in. Folders are bill sections, so this is how you correct a mis-filed item.
Delete it	Select the row and delete. The quantity disappears from the summary at once.
Add another area to the same item	Click the green button beside the item in the <i>Pages</i> list, or right-click the measurement and choose New Section . Both add to the existing takeoff item instead of creating a second one — which is what you want for a room measured in two halves, or a floor plate that repeats on another page. Check the target page is scaled first.

DELETING IN PLANSWIFT DOES NOT DELETE FROM A SAVED BILL

If you have already saved or exported, that bill keeps what it captured. Delete the measurement, click **Reload**, then save or export again to produce a corrected bill.

Organising your takeoff so it bills well

Heron reads your PlanSwift folder structure literally: folders become sections of the bill, item names become descriptions. Ten minutes of housekeeping here saves an hour of editing later.

By storey

Admin Sub, Admin GF, Admin FF, Admin RF — mirrors how the building is built and priced.

By block

On a multi-building job, prefix everything: *Admin ..., Hostel ...*. You can then export one block at a time.

By package

Admin Finishes, Admin Openings — useful where a trade is let separately from the main contract.

Names Heron understands

NAME IT LIKE THIS	BECAUSE
225 Wall Area, 150 Wall Area	The leading figure is the wall thickness in millimetres. Heron uses it to work out block quantities, mortar and rendering.
Concrete in Column, Concrete in slab	Element type drives the concrete, formwork and reinforcement breakdown Heron generates for you.
Column Base Excavation	Substructure items are folded together so excavation, concrete and formwork for one element bill as a single group.
UKB 305×165×40, SHS 100×100×5	Steel section designations are detected and converted from length to tonnage — see Chapter 26.

AVOID DUPLICATE NAMES INSIDE ONE FOLDER

Two items called *Concrete in Column* in the same folder are merged when Heron reads them. If they are genuinely different, say so in the name or put them in different folders.

Before you price

- **Delete trial measurements.** A stray column from when you were testing will be billed as though you meant it.
- **Check for zero and near-zero quantities.** They usually mean a shape that was not closed properly.
- **Confirm every page used is scaled,** and save the PlanSwift job.

CHAPTER 21

Specifications

Heron writes a sensible default description for every item it bills. When your client's specification calls for something more precise, the **Specifications** tab lets you override that wording — without touching the measurement.

What the default gives you

A clean, generic description built from the item and its trade — *"225mm thick sandcrete blockwork in cement mortar (1:6)"*. Perfectly serviceable for a budget estimate.

What an override gives you

Your own words, exactly as the bill must read — brand, grade, finish, standard, method. Written once, used everywhere that item appears.

ADLM Heron — Specifications

Specifications Refresh

Search — filter by trade, item name, description or specification

☐ Only items with a specification

148 ITEMS

12 WITH SPECIFICATION

TRADE	ITEM	QTY	DEFAULT BILL DESCRIPTION	SPECIFICATION (YOURS)	SPEC?
FINISHES	Floor Tiles	427.20	Floor tiling to falls, bedded and jointed	600x600 rectified porcelain, laid to BS 5385 on 25mm screed	✓
BLOCKWORK	225 Wall Area	731.05	225mm sandcrete blockwork in cement mortar	225mm hollow block, minimum crushing strength 2.5 N/mm ² , in 1:6 mortar	✓
FRAME	Concrete in slab	57.61	Reinforced concrete in suspended slab	—	
ROOFING	Roof Covering	430.18	Roof covering on and including battens	0.55mm stone-coated aluminium long-span sheet, colour to approval	✓

Figure 21.1 — Every billable item in the job, its default wording, and your override alongside it. The **Spec?** column makes it obvious at a glance how much of the bill you have specified.

Writing an override

1 Open Specifications and click Refresh

The tab reads the live job, so PlanSwift must be running with the job open.

2 Find the item

Use the search box — it filters on trade, item name, default description and your own specification text at once.

3 Type into the "Specification (yours)" cell

Write it exactly as the bill should read.

4 Leave the cell

Heron confirms *Specification saved for "..."* and writes the text back into the PlanSwift item, so it travels with the job.

5 To revert, clear the cell

You will see *Specification cleared — bill reverts to the default description*.

OVERRIDES LIVE IN THE PLANSWIFT JOB, NOT IN HERON

Send the job file to a colleague and your specifications go with it. Back up the job and they are backed up too.

Wording that earns its place

Say what is measurable

Thickness, grade, mix, size, standard, and where it applies. A contractor should be able to price your line without a phone call.

Keep the unit implicit

The quantity and unit are billed separately, so the description does not need to repeat them. Describe the work, not the arithmetic.

Use the **Only items with a specification** filter near the end of a job to review everything you have written in one pass — it is the quickest way to catch an inconsistency between two rooms that should read the same.

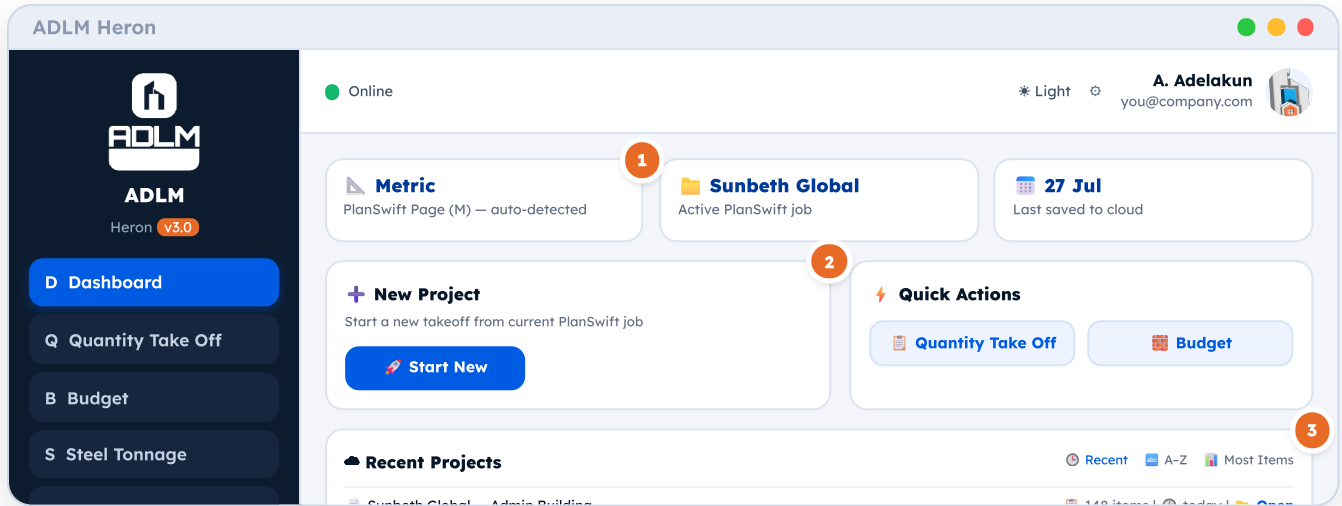
"COULD NOT SAVE THE SPECIFICATION — IS PLANSWIFT STILL RUNNING?"

Heron lost its connection to PlanSwift, usually because PlanSwift was closed or crashed mid-session. Reopen PlanSwift with the job loaded, click **Refresh**, and enter the text again.

CHAPTER 22

Heron dashboard

The Dashboard is where a session starts. It tells you which units Heron has detected, lets you start a new project from the job open in PlanSwift, and lists everything you have already saved to the cloud.



- 1 Units Heron detected from your drawing's Scale Units.
- 2 Starts a takeoff from whatever job PlanSwift has open.
- 3 Projects already saved to the ADLM cloud — click Open to reload one.
- The green dot is your live connection to the ADLM server.

Figure 22.1 — Heron Dashboard. The units card is worth a glance every time you open a new job.

THE GEAR ICON IS MATERIAL CONSTANTS

Cement bags per cubic metre, blocks per square metre, mortar ratios, wastage allowances — all editable, all saved. Set them once to match how you price, and every breakdown in Heron follows suit.

CHAPTER 23

Quantity Take Off

This is where your PlanSwift measurements become quantities you can bill. Three panels, left to right: the folders in your job, the items in the selected folder, and the full breakdown of the selected item.

ADLM Heron — Quantity Take Off

Quantity Take Off Reload Save / Export

Take Off Folders		
Admin Sub		
Admin FF		
Admin GF		
Admin RF		
Admin Finishes		
Hostel GF		

Take Off Items		
Name	Qty	Unit
▶ Concrete in beam floor plan	18.75	CU M
▶ Concrete in slab	57.61	CU M
▶ Concrete in Column	8.02	CU M
▶ 225 Wall Area	731.05	SQ M
▶ Railing	7.39	SQ M

Take Off Breakdown		
Name	Qty	Unit
Concrete in slab (Grade 25)	57.61	CU M
Formwork to slab soffit	384.07	SQ M
Reinforcement — Y12 main bars	4,612	Kg
Reinforcement — Y10 distribution	1,984	Kg
Cement (bags)	374	Nr
Sharp sand	26.9	CU M

1 Reload re-reads the job from PlanSwift. Use it after every change.

3 What that item actually costs you — concrete, formwork, rebar, materials.

2 Items in the selected folder, with the measured quantity.

4 Save / Export opens the review screen (Chapter 24).

Figure 23.1 — Quantity Take Off. The breakdown on the right is generated by Heron from your material constants — you never enter it.

RELOAD IS THE ANSWER TO MOST SURPRISES

Heron holds a snapshot of the job. Measure something new, rename a folder, fix a scale — then come back and click **Reload**. If PlanSwift was restarted in between, Reload also re-establishes the connection.

Tuning an item's breakdown

The generated breakdown is a starting point built from standard assumptions. Where your job differs — a thicker slab, a different bar arrangement, a steeper roof — you correct it in place and the numbers follow.

- 1 Double-click an item in the middle panel**
Its detail window opens, showing the types and parameters behind the quantity.
- 2 Edit the parameters**
Thickness, depth, height, pitch, spacing — whatever that element type exposes.
- 3 Apply, and watch the breakdown recalculate**
Concrete, formwork and material quantities update immediately.

Reinforcement

+ Bars

Main and distribution steel. Enter **Dia** (bar diameter), **Nr** (number of bars) and **Spc** (spacing). The weight in kilogrammes is calculated for you and added to the breakdown.

+ Links

Stirrups and links in beams and columns, entered the same way. Add one row per link type, then **Apply Reinforcement**.

DO THE REINFORCEMENT ONCE, ON THE TYPE

Set the bar arrangement on the element type and every instance of that type inherits it. Editing thirty columns individually is rarely necessary.

Elements with their own logic

ELEMENT	WHAT HERON DOES FOR YOU
Roofs	Takes your plan area and pitch and returns the true covering area, rafter lengths and truss counts — you measure the plan, not the slope.
Foundations	Folds excavation, blinding, concrete and formwork for one element into a single billed group.
Beams and slabs	Deducts intersecting members from the concrete volume and adds soffit formwork automatically.
Piling	Produces pile lengths, cutting and chipping of pile heads, and cast-in-place or pre-cast concrete as appropriate.
Services	Adds the accessories a measured run implies — drop pipes, cable allowances, fittings — as separate billable lines.

CHAPTER 24

Save, price and export

Clicking **Save / Export** does not save straight away. It opens a review screen — your last chance to check descriptions, set rates and reorder the bill before anything is committed.

Review Takeoff Before Saving

148 items ready to save across 6 folders
Rates matched from your RateGen library

Rates: 131 / 148
Total (NGN): 412,880,150.00

Project Name

Sunbeth Global — Admin Building

Search Rate

Search rate library...

ITEM	DESCRIPTION	QTY	UNIT	RATE	AMOUNT
C FRAME — ADMIN FIRST FLOOR					
C1	Reinforced concrete Grade 25 in suspended slab	57.61	CU M	185,000.00	10,657,850.00
	Formwork to slab soffit	384.07	SQ M	—	—
C2	Reinforced concrete Grade 25 in columns	8.02	CU M	210,000.00	1,684,200.00
C3	High-yield reinforcement bars, cut, bent and fixed	6.60	Tonne	1,150,000.00	7,590,000.00
D BLOCKWORK AND OPENINGS					
D1	225mm hollow sandcrete blockwork in 1:6 mortar	731.05	SQ M	14,500.00	10,600,225.00

↑ Up

↓ Down

Export All

Export Folder(s)

Cancel

Save to Cloud

1 How many items matched a rate, and the running total.

3 Export to Excel — everything, or chosen folders only.

2 Select a row, then search your library and apply a rate to it.

4 Save the priced takeoff to your ADLM cloud project.

Figure 24.1 — The review screen. The amber row is Heron warning that its rate is below the material-plus-labour cost it calculated for that item.

What you can do on the review screen

ACTION	HOW
Edit a description	Click the cell and type. Section headings and sub-items are locked; billable lines are not.
Set or change a rate	Type directly into the Rate cell, or select the row, search your library and pick a match. Amount updates instantly.
Reorder the bill	Select a row and use Up / Down , or drag it. The order you set is the order it exports in.
Remove a line	The X at the end of the row. It leaves your PlanSwift measurement untouched — only this bill is affected.
Keep your edited rates	Tick Keep edited rates and your manual rates survive the next time you open this review. Untick it to pull the latest from your library instead.

AN AMBER ROW MEANS THE RATE LOSES MONEY

Heron compares your rate against the material and labour cost it computed for that item. Amber means the rate is lower. Raise it, or accept it deliberately — but do not export without looking.

The two ways out

Save to Cloud

Stores the priced takeoff against your ADLM account. It reappears under **Recent Projects** on the Dashboard, on any PC you sign in from. Needs an internet connection.

Export to Excel

Writes a formatted bill of quantities — section headings, item references, quantities, units, rates, amounts and totals. Works offline, and is the file you send out.

Use **Export Folder(s)** when you need to issue one block or one trade on its own — you choose which folders go into the spreadsheet, and the section lettering follows your selection.

What the exported spreadsheet contains

- A **section heading** for every folder, lettered in the order you set on the review screen.
- An **item reference** against each billable line, so the bill can be referred to in correspondence.
- **Description, quantity, unit, rate and amount** — with sub-items shown beneath their parent and not separately priced.
- **Section totals** and a **collection** at the end, ready to hand to a client or a contractor.

The file is a normal **.xlsx**: you can restyle it, add a preliminaries section, or paste it into your own template without breaking anything.

IF THE CONTRACT IS LOCKED

A red **CONTRACT LOCKED** chip means the contract sum is fixed. You can still save — your revised quantities and rates are recorded as *actuals* against the baseline, and the contract sum itself does not move.

CHAPTER 25

Budget — material & labour

Where **Quantity Take Off** answers "what will I charge?", **Budget** answers "what will it cost me?" — the same job resolved into cement, sand, blocks, rebar, tiles and the labour to fix them.

Review Materials Before Saving					
64 materials consolidated from 148 takeoff items Prices matched from your material library			58 matched	Total (NGN): 268,430,900.00	
☒	MATERIAL / LABOUR	QTY	UNIT	RATE	AMOUNT
☒	Cement (50kg bags)	3,842	Nr	9,800.00	37,651,600.00
☐	Sharp sand	412.6	CU M	28,000.00	11,552,800.00
☐	Granite 3/4"	286.4	CU M	52,000.00	14,892,800.00
☒	225mm hollow sandcrete blocks	7,311	Nr	950.00	6,945,450.00
☐	High-yield reinforcement Y12	4.61	Tonne	1,020,000.00	4,702,200.00
☐	Labour — blocklaying (225mm)	731.05	SQ M	2,400.00	1,754,520.00
☐	Labour — reinforcement fixing	6.60	Tonne	95,000.00	627,000.00

Figure 25.1 — The material and labour review. Tick items as you buy them and the checkbox becomes a running procurement record.

1 Open Budget with the job loaded

Heron consolidates every takeoff item into one material and labour schedule — no duplicates, quantities summed across the whole job.

2 Check the prices

Matched prices come from your library. Anything unmatched shows a blank rate — type it in, or search the library and pick one.

3 Build up your labour rates if you need to

Compose a rate from gang size, output and daily pay rather than guessing a lump figure.

4 Tick materials as they are procured

The tick is saved with the project, so the schedule doubles as a purchase tracker.

READ THE TWO TOTALS TOGETHER

Bill total from Chapter 24, cost total from this page. The gap between them is your margin — and it is far easier to defend a price when you can see both numbers before you submit.

CHAPTER 26

Steel Tonnage

Structural steel is measured in metres on the drawing but bought in tonnes. This tab reads the section designation out of your item names, looks up the mass per metre, and does the conversion — including connections and waste.

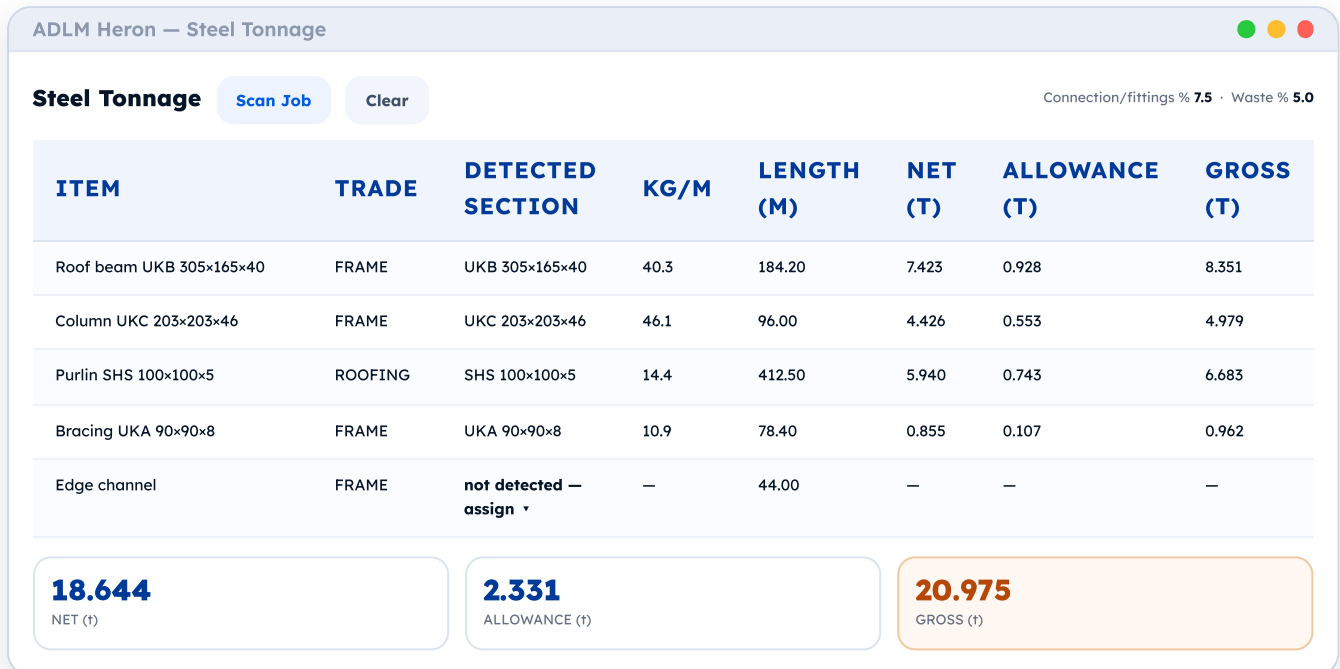


Figure 26.1 — Steel Tonnage after a scan. The amber row is an item whose section could not be read from its name — assign it manually from the catalogue.

Getting a clean scan

1 Name items with the full designation

The catalogue covers UKB, UKC, PFC, UKA, SHS, RHS and CHS. *UKB 305×165×40* is read; *steel beam* is not.

2 Click Scan Job, then assign anything it missed

Use the **Assign Section** dropdown and type to search. The assignment sticks for that item.

3 Set your allowances

Connection/fittings % covers cleats, plates, bolts and welds; **Waste %** covers offcuts.

COUNT × HEIGHT ITEMS

Where a column was measured as a count rather than a length, the tab shows the tonnage both ways — *gross if metres* and *gross if count × height* — so you can pick the interpretation that matches how you measured.

CHAPTER 27

Connect Excel

If your bill lives in a spreadsheet of your own design, the Excel add-in pulls live takeoff, materials and rates straight into it — no copy-paste, no re-export when a quantity changes.

Turning it on, once

1 Close Excel completely

The add-in cannot be registered while Excel is running. Check the notification area.

2 Heron sidebar → Connect Excel

Heron checks the add-in's health and reports what it finds — not installed, files missing, or switched off in Excel.

3 Say yes when it offers to fix it

It installs or re-enables the add-in for your Windows account.

4 Open Excel

A task pane titled **ADLM Takeoff Link** is available. Pin it and it opens with every workbook.

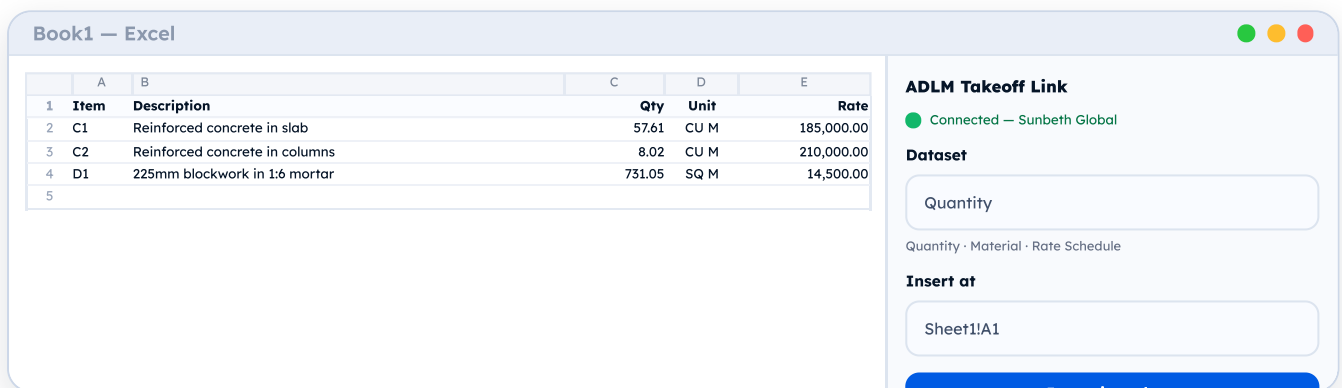


Figure 27.1 — The **ADLM Takeoff Link** pane beside a working bill. Choose a dataset, choose where it goes, insert — then refresh whenever the takeoff changes.

The three datasets

Quantity

The billable takeoff — item reference, description, quantity, unit and rate. The same content as the review screen.

Material

The consolidated material and labour schedule from **Budget**, with prices.

Rate Schedule

Your rate library itself, for building lookup formulas against in your own sheets.

THE PANE SAYS "NOT CONNECTED"

The link reads from Heron itself, so Heron must be open with the project loaded. Open it, load the job, then click **Refresh** in the pane. If the pane is missing from Excel altogether, reinstall Heron from the Hub — that also installs the Microsoft VSTO Runtime the add-in depends on.

CHAPTER 28

Troubleshooting the takeoff

Chapter 13 covered installing and licensing. This page covers the takeoff itself — the template tree, the connection between the two windows, and quantities that look wrong.

SYMPTOM OR MESSAGE	WHAT TO DO
The ADLM template tree isn't in PlanSwift	In order: sign in to Heron; close PlanSwift completely and reopen it; confirm the dropdown at the top of <i>Templates, Parts, Inputs</i> reads Complete ADLM TakeOff Plugin . If it is still missing, sign out and back in — that rewrites the template folder.
Templates vanished after signing out	Expected. Signing out hides them at the next PlanSwift restart. Sign in again and restart PlanSwift.
"Could not retrieve the Job from PlanSwift"	No job is open, or PlanSwift started after Heron did. Open the job, then click Reload .
"PlanSwift connection lost. Please restart PlanSwift and click Reload."	PlanSwift closed or crashed while Heron was reading it. Restart PlanSwift, reopen the job, click Reload . Nothing is lost.
Quantities are wildly too big or too small	Almost always scale. Check the status bar reads Manually Scaled on the page concerned, re-scale it, then Reload . See Chapter 18.
Everything is out by roughly the same percentage	The page was scaled off a wrong dimension. Verify with the Dimension tool and re-scale.
Heron shows Imperial on a metric job	Unit detection fell back because no page carried a usable Scale Units value. Scale the pages properly, or override in Settings → Display Units .
An item is missing from Heron	Click Reload . If it still doesn't appear, check it isn't a duplicate name inside the same folder, which merges.
No rates matched	Rates come from RateGen. Confirm your account includes it, that you are online, and that the connection dot is green. Then reopen the review screen.
Save to Cloud is greyed out	You are on an offline session. Sign in again while connected, then save.
Excel pane missing or blank	See Chapter 27. Close Excel, click Connect Excel in Heron, allow it to repair, reopen Excel.
Heron closed unexpectedly	Reopen it and carry on — your takeoff is in the PlanSwift job, not in Heron. Heron records a diagnostic log as it runs; if the crash repeats, use Feedback and support will tell you which file to send.

THE TWO-STEP FIX THAT RESOLVES MOST OF IT

Make sure PlanSwift is open with the job loaded, then click **Reload** in Heron. Almost every "Heron can't see it" report is a stale snapshot.

CHAPTER 29

Takeoff quick reference

A job, start to finish

- Open PlanSwift, open Heron, sign in
- New job → import drawings → name the pages
- **Scale every page**, verify with Dimension
- Pick a template, then measure
- Heron → Quantity Take Off → **Reload**
- **Save / Export** → set rates → save or export

Scaling, in one box

- **Home** → **Scale**, click two known points
- Type the real length, in the units shown
- Status bar must read **Manually Scaled**
- Verify with **Home** → **Dimension** elsewhere
- Repeat for every page you measure on
- Rescaling later is safe — then **Reload**

Which tab do I want?

- **Dashboard** — units, new project, cloud projects
- **Quantity Take Off** — what you bill
- **Budget** — what it costs you
- **Steel Tonnage** — metres to tonnes
- **Specifications** — your bill wording
- **Connect Excel** — live link to a spreadsheet

When something looks wrong

- Click **Reload** — fixes most of it
- Quantities absurd? Check the page scale
- No templates? Sign in, restart PlanSwift
- Connection lost? Restart PlanSwift, Reload
- Rates blank? Check you are online
- Retrying is always safe

Getting help

The **Feedback** button at the bottom of the Heron sidebar opens WhatsApp with your account details already attached, so you never have to explain who you are. For anything that needs a written trail, raise a ticket from adlmstudio.net.

What to send with a takeoff problem

The job name, the folder and item affected, whether the page is scaled, the exact wording of any message, and your PlanSwift version. A screenshot of the Takeoff Summary and of Heron's Quantity Take Off tab answers most questions at once.

What to send with a crash

What you were doing at the time, the job name, and the exact wording of anything on screen. Heron records a diagnostic log as it runs — support will tell you which file to attach and where to find it.

From drawing to bill

One sign-in installs it, one scale makes it accurate, one template tree measures it, and one click prices it. That is the whole workflow — everything else in this guide is detail.

adlmstudio.net
[Chat on WhatsApp](#)
[Raise a ticket](#)