

PlanSwift Professional: Quantity Takeoff & Estimation

Course Objectives

- To equip learners with the skills to perform accurate quantity takeoffs using PlanSwift.
- To develop proficiency in handling construction drawings, scaling, and measurement techniques.
- To enable users to create cost estimates, templates, and reports efficiently.
- To provide hands-on experience in real-world project-based estimation workflows.

Target Audience

- Quantity Surveyors & Estimation Engineers
- Civil Engineers & Construction Professionals
- Contractors & Project Managers
- BIM & CAD Professionals transitioning into estimation
- Students (Civil/Construction/Architecture) seeking industry skills

Course Outcomes

By the end of this course, participants will be able to:

1. **Apply accurate quantity takeoff techniques** using PlanSwift for area, linear, segment, and count measurements from construction drawings.
2. **Interpret and manage digital drawings effectively**, including importing plans, organizing pages, and setting precise scales to ensure measurement accuracy.
3. **Develop detailed cost estimates and Bills of Quantities (BOQs)** by linking takeoff quantities with pricing, assemblies, and templates.
4. **Utilize advanced PlanSwift features** such as annotations, overlays, specialty takeoffs, and customization tools to enhance productivity and accuracy.
5. **Create and manage reusable templates, parts, and assemblies** to standardize estimation workflows and improve efficiency across projects.
6. **Generate professional reports and integrate with Excel** for data analysis, documentation, and stakeholder communication.
7. **Execute complete real-world estimation workflows**, from project setup to final reporting, ensuring industry-ready competency.

Course Outline - The course comprises **32 hours** of theory and labs and is divided into **11** different chapters. Each chapter will be followed by hands-on lab exercises to reinforce learning and gauge understanding of the topics covered.

Table of Contents: -

Module 1: Introduction to PlanSwift & Interface

- Overview of PlanSwift Software
- Applications in Quantity Takeoff & Estimation
- User Interface (Ribbon, Tabs, Panels)
- Navigation Techniques & Workspace Setup
- Understanding Project Workflow

Module 2: Job & Project Management

- Creating New Jobs
- Opening & Managing Existing Jobs
- SwiftJob Creation (Backup & Sharing)
- Importing & Exporting Jobs
- Job Properties & Organization

Module 3: Page Management & Scaling

- Importing Drawings (PDF, CAD, Images)
- Page Organization & Folder Creation
- Renaming & Sorting Pages
- Setting Scale (Automatic & Manual)
- Verifying Dimensions & Accuracy

Module 4: Basic Takeoff Tools (Core)

- Introduction to Takeoff Concepts
- Area Takeoff (Flooring, Concrete, Roofing)
- Linear Takeoff (Walls, Pipes, Ducts)
- Segment Takeoff (Beams, Structural Elements)
- Count Takeoff (Fixtures, Doors, Equipment)

Module 5: Advanced Takeoff Techniques

- Working with Sections & Multi-page Takeoffs
- Subtraction Methods (P2P, Box)
- Arcs & Complex Shapes
- Snap, Ortho, Freehand & Precision Tools

Module 6: Annotations & Documentation

- Adding Dimensions
- Notes & Markups
- Revision Clouds & Highlights
- Overlays & Image Insertions
- Legends & Documentation Standards

Module 7: Specialty Takeoff Tools

- Single-click Takeoffs
- Roof Takeoffs
- Price per Sq. Ft Calculations
- Cubic Yard Calculations
- Grid & Joist Tools

Module 8: Templates, Parts & Assemblies

- Creating Templates
- Organizing & Modifying Templates
- Parts & Assemblies Workflow
- Reusable Estimation Components

Module 9: Estimation & Costing (2 Hours)

- Estimating Layout Setup
- Linking Quantities to Costs
- Cost Calculations & Adjustments
- Project Cost Analysis

Module 10: Reports & Excel Integration

- Generating Reports
- Report Designer Basics
- Exporting Data to Excel
- Excel Integration Workflow

Module 11: Advanced Features & Customization

- Shortcuts & Hotkeys
- Customizing Interface
- Plugins & Extensions
- Settings & Data Management