

# TWO-WAY FINISH SCHEDULE

## INSTRUCTIONS FOR SET-UP AND USE

IN VECTORWORKS ARCHITECT



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Written for Vectorworks 2016

## CONTENTS

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TERMINOLOGY 4

ROOM FINISHES 5

SETTING UP A PROJECT FOLDER FOR FINISHES 6

USING THE TWO-WAY WORKSHEET WORKFLOW 7

## TERMINOLOGY

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**Housekeeping Worksheet** – a “working” schedule used to make changes to the Space object and the Finish Schedule simultaneously.

**Master Folder/Resources** – General office standard libraries that are accessible to everyone via a server or other shared location.

**Project Resources** – Libraries that are specific to a particular project. Project resources should be a duplication of the Master resources *in addition* to project specific resources.

**Project Folder** – folder that houses project specific libraries. Within Vectorworks documentation, this is also called a “Workgroup” folder. We will use *Project Folder* throughout this document.

**Application Folder** – contains the Vectorworks program and default libraries that are loaded during installation.

**User Folder** – The User folder contains libraries and resources created by you, but more importantly, also contains preferences and Workspace Editor changes that have been made in Vectorworks. The **user folder** can be found here:

Mac: /User/<Username>/Library/Application Support/Vectorworks/2015/  
Windows:

C:\Users\<Username>\AppData\Roaming\Nemetschek\Vectorworks\2015\

The main Finishes folder can be found here:  
Mac: HD/Applications/Vectorworks  
2015/Libraries/Defaults/Space/Space-Room  
Finishes

It is important to note that these default locations mean that any customized resources created and saved to a User folder are saved to the hard drive of the user and not to a shared, accessible location such as a server.

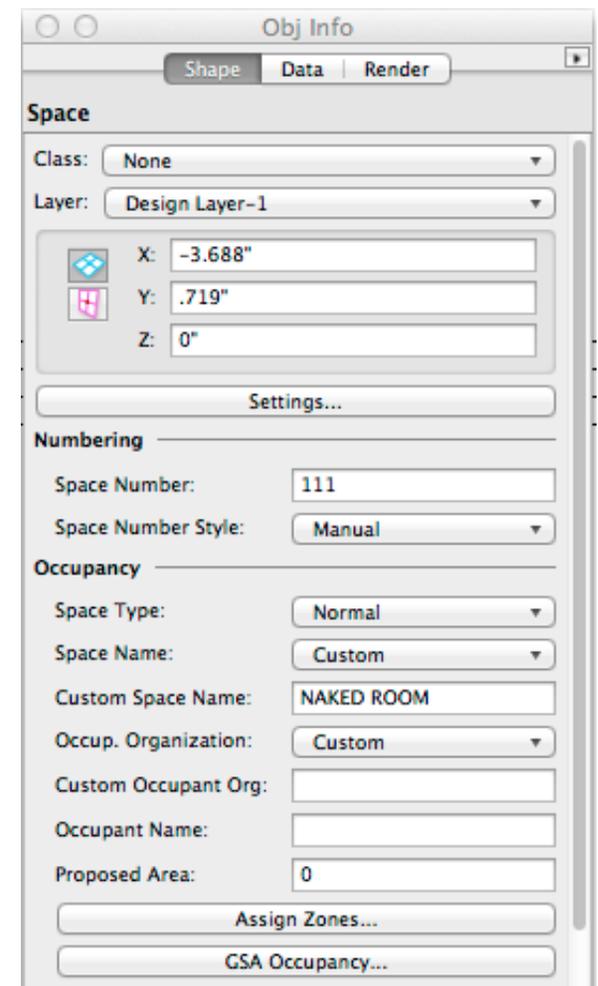
These locations can be changed to your desired default location.

## ROOM FINISHES

Room Finish Schedules can be two-way in Vectorworks. This means that the finish of a room can be changed either from within the Space (Assign Room Finish), or from a worksheet. Obviously, in larger projects, adding and editing finishes at the worksheet level is the more desired and practical approach.

However, this two-way functionality requires an additional worksheet that becomes the “driver” or housekeeping worksheet and, in essence, “feeds” the information to the Finish Schedule. The Finish Schedule itself IS NOT two-way and is intended to be placed on a sheet layer for printing or other means of distribution.

Additionally, in order to have the Finish Schedule maintain its two-way functionality, you **must** enter room names in the **Custom Space Name** field of the Space tool in the OIP. This will allow editing at the worksheet level, design layer level or OIP level.



## SETTING UP A PROJECT FOLDER FOR FINISHES

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The default finishes available in a new Vectorworks document are “pulled” from text files located in the Application folder – Vectorworks/Libraries/Defaults/Space/Space – Room Finishes/(four individual folders) Base, Ceiling, Floor, Walls. If you do not want to see these default finishes in your finish drop down, the Space-Room Finish folder should be removed (or renamed) from the Applications folder so that its contents will not be accessed. Keep it in a safe place and/or use it as the beginnings of your “Master” finishes file. It is also very important to note that the User folder *should not* have any finishes within it.

Finishes will be managed from a Project folder or folders that is/are resident on your server. A Project folder must be set up for each project. Then, a “path” in each project folder must be created. The path must be identical to the one contained in the Application folder, starting from “Libraries” and ending with folders for each of the four finish categories containing text files of finishes specific to that project. Any finishes that need to be added or modified for a particular project should be done via these text files, and not through the Vectorworks application directly.

To create and access a Project Folder: In **Vectorworks Preferences**, under the User Folders tab, in the lower pane “Workgroup and Projects Folders”, the path to the project folder(s) must be established. You can add multiple Project Folders if you are working on multiple projects simultaneously. The *folder located* at THE TOP of the list is the active one that the

two-way “housekeeping” worksheet will pull its information from. You will need to change this prioritization of your Project Folders when switching between projects.

Because Vectorworks has a “built in” prioritization for resources that puts the User folder first (then Project folders, then Application folder) and as stated earlier, the individual User Folder should not contain any finish information. If it does, you will ONLY be able to select from that list. Therefore it is important that the User folder is not used to store any finish list resources.

*QUICK TIP: Upon “file Open” the finishes from the last Project folder accessed (or if it’s a new installation of Vectorworks, finishes from the application’s defaults) will appear in the “Assign Room Finishes” pane. This can lead to some confusion regarding which finishes to use. The finishes from the last project are ABOVE the gray line and should be disregarded if they are not applicable.*

*The best way to avoid any confusion is to always assign finishes through the two-way worksheet as outlined in the following workflow.*

## USING THE TWO-WAY WORKSHEET WORKFLOW

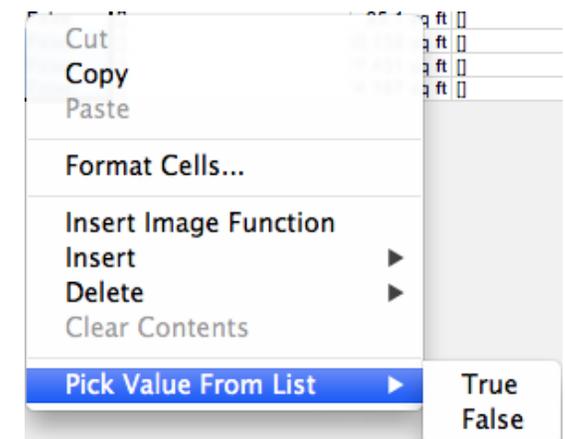
In order to manage a custom Finish Schedule more effectively, it is recommended that you *always* assign finishes through the Housekeeping worksheet and *not* through the “Assign Room Finishes” dialog box.

The first step is to open the “Custom Room Finish Housekeeper” worksheet. The second step is to ensure that the finishes will show “on schedule” then from there, you’ll select and input your finishes.

- 1) Select and Open the “Custom Room Finishes Housekeeper” worksheet
- 2) If the **Database Header** row is open, close it
- 3) If you do not see your spaces listed, **recalculate** the worksheet.
- 4) Click on the cell of the *first* entry in the column “**On Schedule**”. It’s probably defaulting to “False.” This means that the space is set to *not* appear on your Finish Schedule. Let’s change that...
- 5) Hold the “Shift” key down and select the *last* entry in that same column. Ensure that all entries in that column are highlighted, now RIGHT-CLICK and from the contextual menu, choose the bottom selection “Pick Value from List” and choose TRUE. This means that the selected spaces will now appear on the Finish Schedule. All entries in that column should now be set to TRUE.

*NOTE: Both the contextual menu’s “Pick Value from List” and the drop-down above the column identifiers are key to the two-way worksheet workflow. The lists accessed through both are the finish lists in your Project Folder that is at the top of the Project Folder list in your Vectorworks Preferences. The drop-down can be used to input finishes in an individual cell. However, if you want to change or enter data in multiple cells at once, use the “Pick Value from List” multiple-selection method described in steps 4 and 5 above.*

**A word of caution** – If you are working on multiple projects simultaneously, you will have finishes from the previous project appear ABOVE a small separator line when choosing from the drop-down or using the multi-selection “Pick Value from List” method – despite changing the prioritization of Project Folders within your Vectorworks Preferences. In most instances, a “reset” of the space object will remove the previously used finishes and list only the finishes from the Project Folder (see the “Quick Tip” below). This is a limitation of the program and caution must be used as finish information changes subtly.



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- 6) Another option that can be controlled from the Housekeeper worksheet is whether or not to have the Space Number auto-increment. A similar method of choosing from the drop-down or right-clicking and "Pick Value from List" will let you toggle between auto-incrementing or letting you input the space number in the worksheet. The two choices are "Counter Only" or "Manual." The Manual setting lets you adjust the space number at the worksheet level. Additionally, if you choose the manual entry method, DO NOT switch back to auto-increment or the numbering sequence in all your already numbered spaces will be lost and the program will revert to an auto-increment scenario.
  - 7) Once data entry is complete, the housekeeper worksheet can be closed and removed from the sheet or design layer until updating/changing is required.
  - 8) Now select the "Custom Room Finish Schedule" and place it on the drawing or hit "Recalculate" if the schedule has already been placed on a sheet.
  - 9) To complete the Finish Schedule, select the Room Finish Legend from Tools>Reports>"Create Room Finish Legend". A note regarding the Room Finish Legend, the legend will not recalculate and must be re-placed on the sheet each time a finish is added or subtracted from the finish list.

It could be said that Vectorworks offers TOO MUCH flexibility in that the management of the finish information will take a close eye as nothing is really "lockable." Take note that, if you are in the housekeeper worksheet and choose from the drop-down or select from "Pick Value from List", the finish items BELOW the small separator are the "active" finishes and are the finishes included in the FIRST item in the Vectorworks Preferences User Folder's "Workgroup and Projects Folders." These finishes are "pulled" from the text file located in the selected project file on the server.

*QUICK TIP: Occasionally, to get the "Housekeeping" worksheet to work, you need to cause it to "reset." The simplest way is to click on a space, in the OIP, scroll down and enter "Assign Room Finishes" and change one. Then return to the worksheet.*