Schedule Builder

Agency User Guide

Table of Contents

Introduction

Overview

The Schedule Builder application allows agencies to create fixture schedules which can be shared with specifiers for collaboration on projects. The process for creating a schedule begins in Project Container on the Schedule tab and includes the ability to convert to *agile* Submittal Generator and Quotes.

Access

Schedule Builder is a role-based application and any user that needs access should be setup by the Agency Admin.

Getting Help

This User Guide will be your first source for 'How To' information. For additional questions and concerns please contact the Lithonia Support Center at 1-800-241-3638 or via email at AgencySupport@AcuityBrands.com.
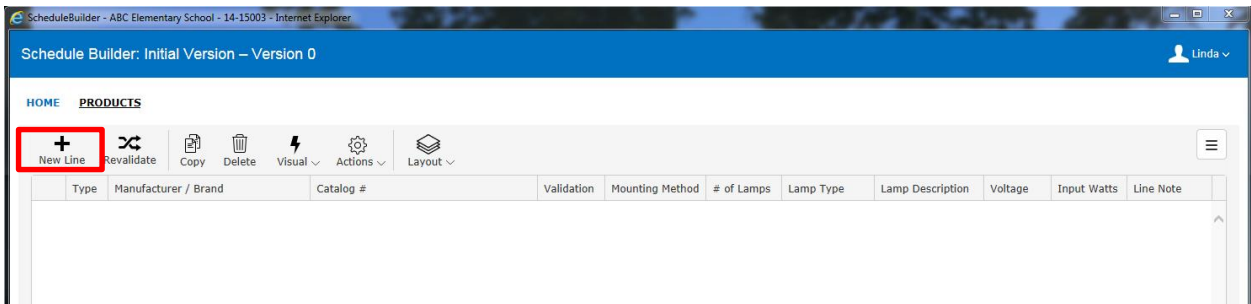
Creating a new Schedule

1. Create a new project in *agile* Project Container and then save your project.


2. Click on the **Schedule Tab**.

3. Click New Schedule
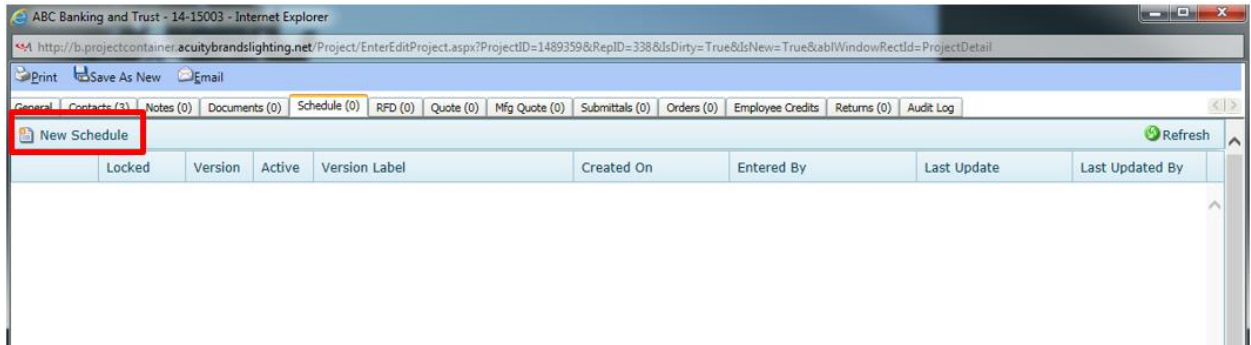
4. The new schedule will open and will default to the Products section. To start a new line on your schedule click the **New Line** icon (or ALT N).

5. Enter the line details. Schedule Builder uses the "Auto-Complete" catalog functionality to show product options based on sales history. (Note: Manufacturer / Brand column will display the brand, i.e. Lithonia Lighting, Peerless. To display the Manufacturer, i.e. Acuity Brands Lighting, create a new Layout and add the Manufacturer column).
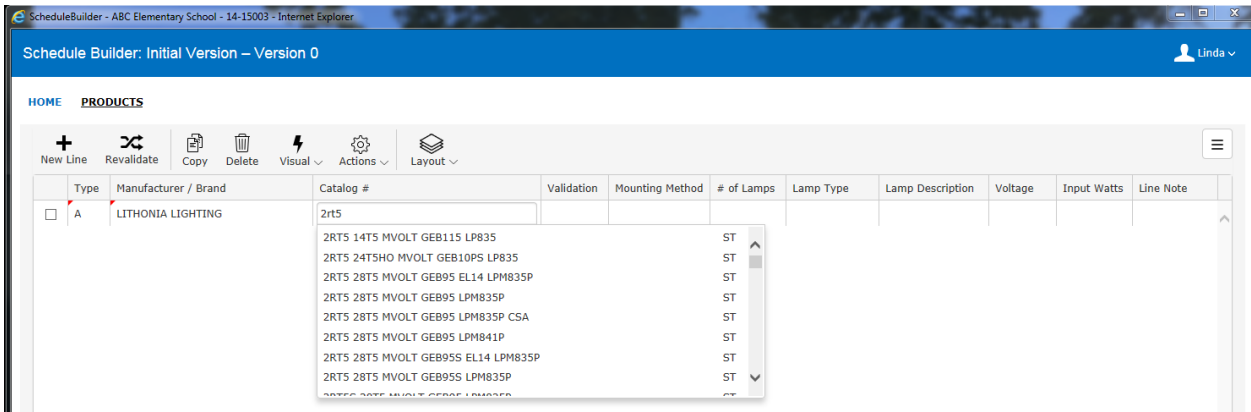
6. To validate the product, hit **Enter**. The Validation column will display a check mark ✔ if the product is a valid Acuity or Non Acuity product and will display an X if the product does not validate. If the product is not valid, the **ABL Product Validation Exception** feature will display and indicate the nomenclature that failed. Attributes from the Product Database that are available for the catalog # will be automatically populated as part of the validation; such as Mounting Method, # of Lamps, Lamp Type, Lamp Description, and Voltage. Some attributes will have multiple choices, such as voltage and mounting method. Simply delete the values that do not meet the criteria for the current project.
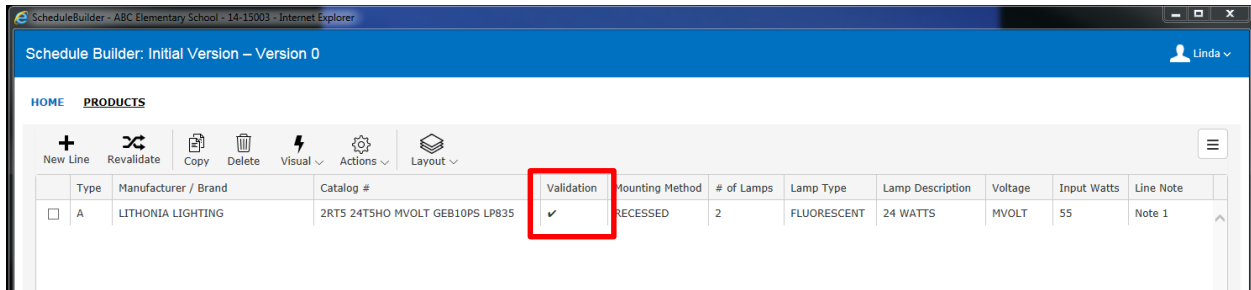
7. After completing the entry for a catalog # and saving, the next time you enter the same product and **Tab** out of the Catalog # field, a function called "**Auto-Fill**" will remember the values from the most recent entry (based on agency, not individual user) and will fill those values for you. Since line notes are specific to a job, these are not included in the Auto-Fill function.

Revalidate

Clicking the Revalidate icon will revalidate all products on your schedule.
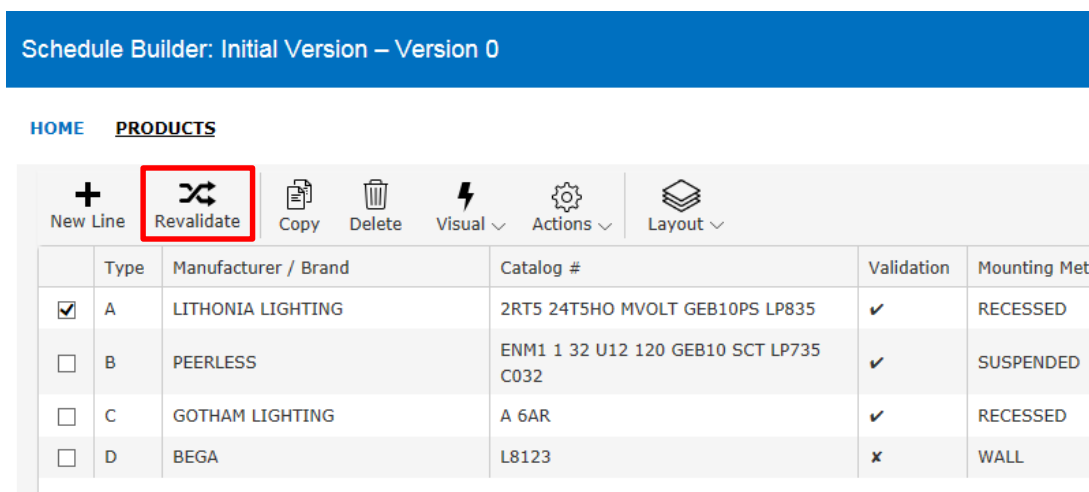
Copying Lines

To copy a line, check the line then click copy. The new line will display (with no need to paste).

Deleting Lines

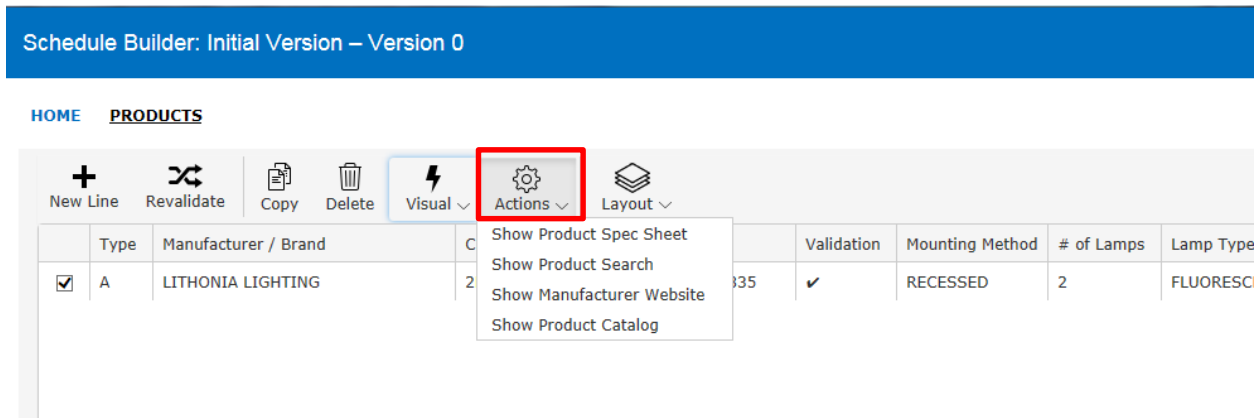To delete a line, check the line then click delete.

Visual Tools

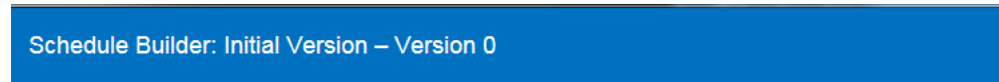You can easily access the web-based Visual Tools from the Schedule Builder toolbar.
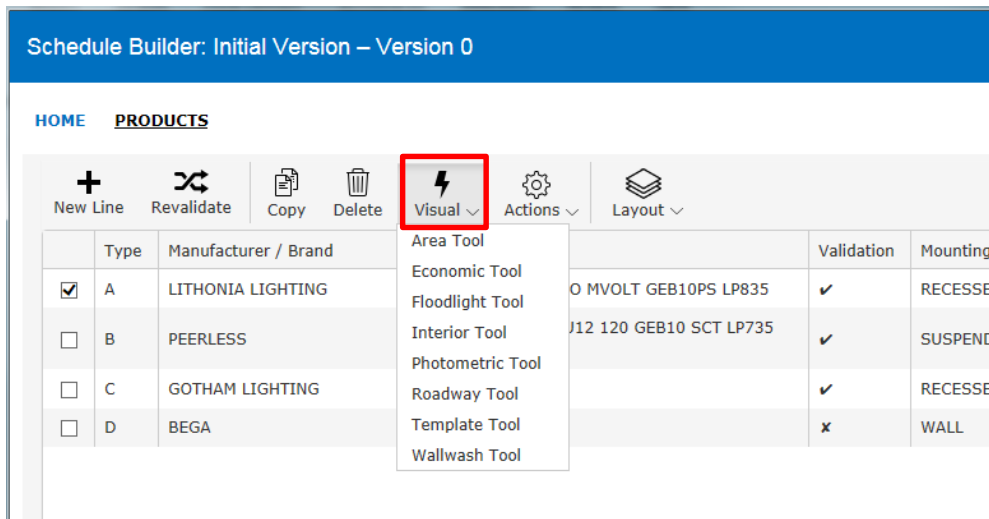
Actions

The Actions menu will give you access to spec sheets, product search, manufacturer website, and product catalog (non-ABL). Select the line you want to display and then click the Actions icon.

Layout Manager

Layout Manager allows you to add and remove columns and arrange them to your preference. You can create and save multiple layouts. From the Layout drop-down menu, select Create/Manage Layouts, then click New Layout. Name your layout, choose the columns you want to see in the order you prefer by using drag and drop, and then click Save. After you save, you can adjust column sizes. To save the column size, select the Layout icon and select Save Column Size.

Additional Tools (Import / Export)

The Additional Tools "hamburger" icon on the right side of the lines tool bar contains the **Import** and **Export** features. Your schedule will export as a CSV file, which is compatible with Microsoft Excel. You can import a schedule from Excel (.csv) or from Visual (.xml) to an existing schedule. Note: for Excel imports, your schedule column names must be the same on the .csv file as they are in your schedule, otherwise the data for the columns that do not match will not come over.

Schedule Builder: Initial Version – Version 0							Linda ⌄

HOME   **PRODUCTS**

+ New Line   ⤬ Revalidate | 🗐 Copy   🗑 Delete   ⚡ Visual ⌄   ⚙ Actions ⌄   ⬙ Layout ⌄   ☰

Additional Tools
Import
Export

|	Type	Manufacturer / Brand	Catalog #	Validation	Input Watts	Line Note
☐	A	LITHONIA LIGHTING	2RT5 24T5HO MVOLT GEB10PS LP835	✔	55	Note 1
☐	B	PEERLESS	ENM1 1 32 U12 120 GEB10 SCT LP735 C032	✔	28	Note 2
☐	C	GOTHAM LIGHTING	A 6AR	✔	100	Note 3
☐	D	BEGA	L8123	✘	60	Note 4

Printing

The print icon is located in the bottom navigation panel. You can either print a PDF of the schedule or email a CSV or PDF.
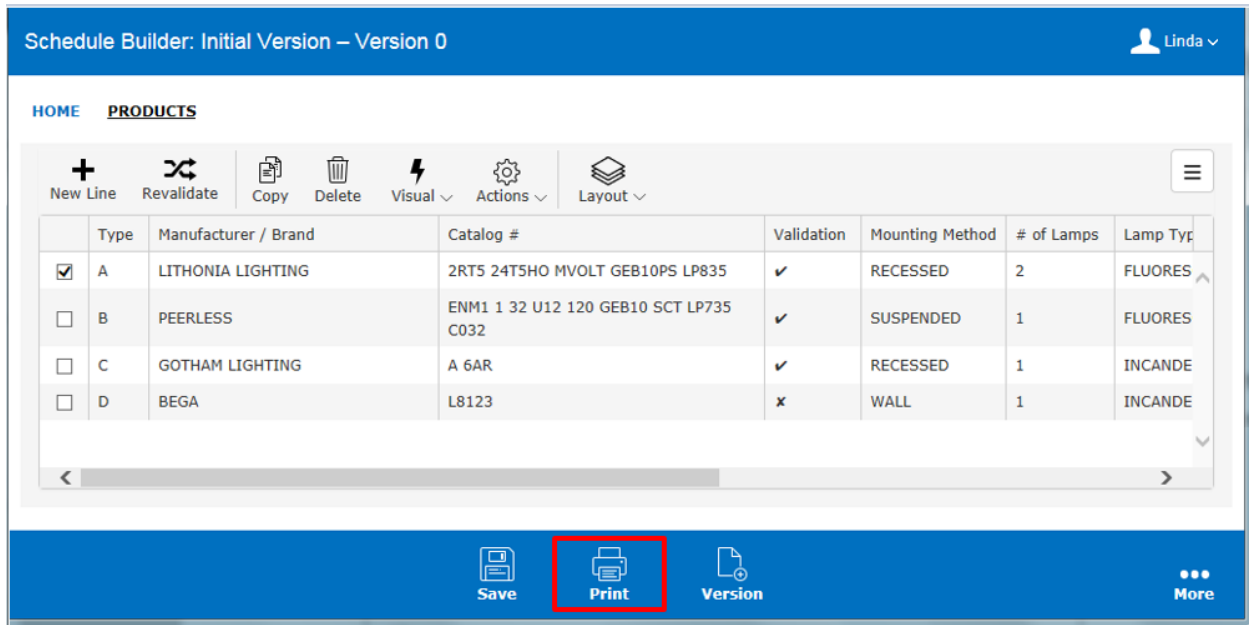

The print dialog has three sections. The **Options** tab allows you to customize the PDF document with Agency Name, Logo, and Address. You can also add a contact name from your agency as well. If you want to print just one manufacturer instead of the entire schedule, select the "Only this Manufacturer" option and chose a manufacturer from the drop down list.
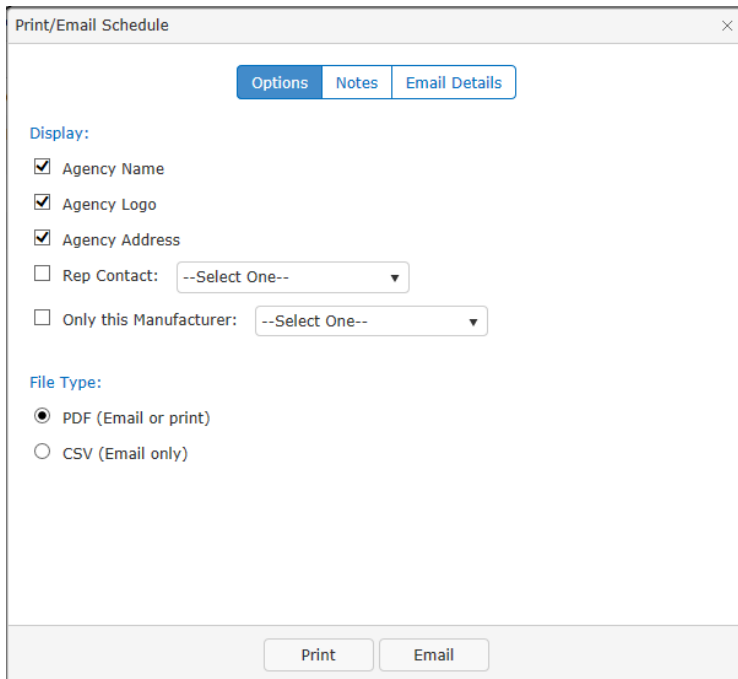
The **Notes** tab allows you to add Notes or Standard Notes to the PDF document (Schedule Builder is now a document type in the Standard Notes application).
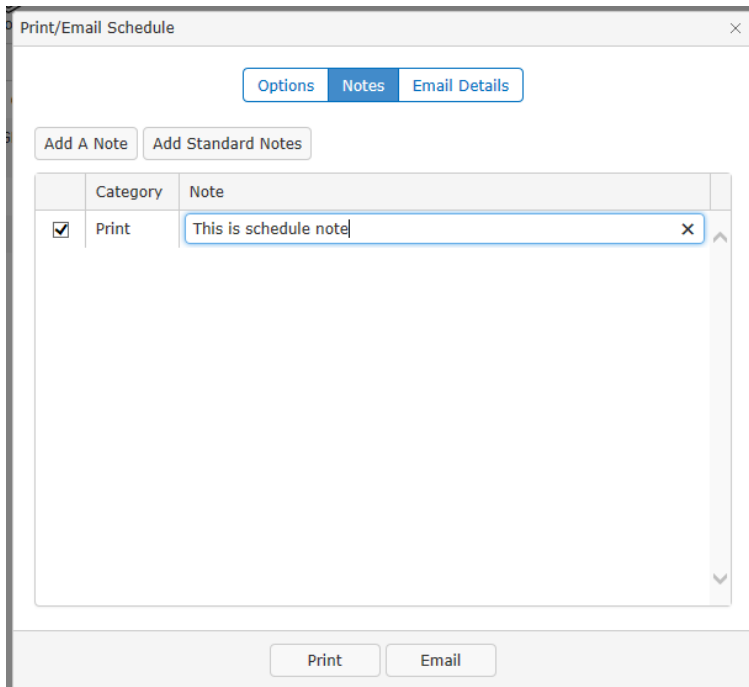
Email Details allows you to select a recipient from the Contacts section of the project container (if those contacts have email addresses associated). Or you can manually add an address. You can also type a message to the recipient and blind copy yourself.
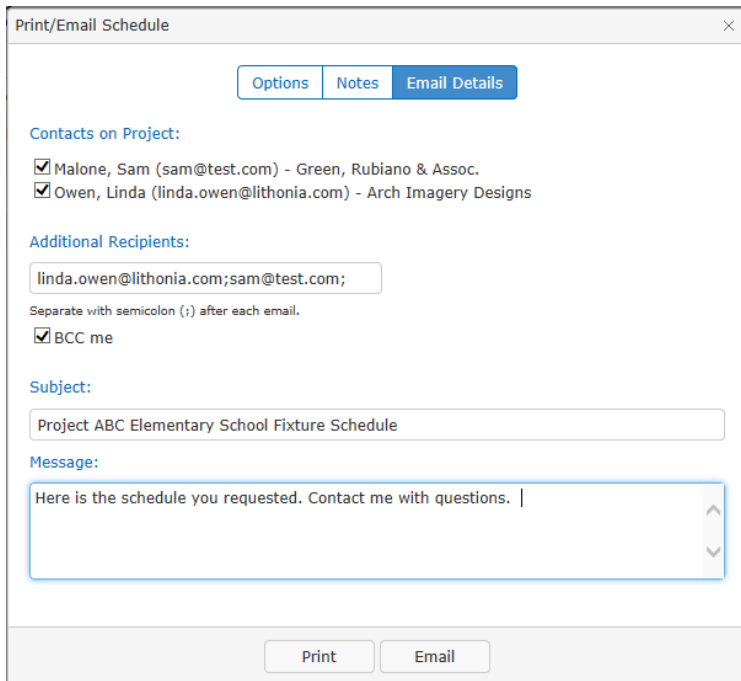
Sample of the PDF document:

Type	Manufacturer / Brand	Catalog #	Mounting Method	# of Lamps	Lamp Type	Lamp Description	Voltage	Input Watts	Line Note
A	LITHONIA LIGHTING	2RT5 24T5HO MVOLT GEB10PS LP835	Recessed	2	Fluorescent	24	MVOLT	55	Note 1
B	PEERLESS	ENM1 1 32 U12 120 GEB10 SCT LP735 C032	Suspended	1	Fluorescent	32	120	28	Note 2
C	GOTHAM LIGHTING	A 6AR	Recessed	1	Incandescent	100 Watts	120	100	Note 3
D	BEGA	L8123	Wall	1	Incandescent	60 Watts	120	60	Note 4

Notes

* This is a schedule note

Creating a New Version

You can create a new version of the schedule based on an existing version or create a clean version from scratch. To create a new version, click on the Version icon in the bottom navigation bar, and then complete the required fields in the New Schedule Version dialog window.

Audit Log

The Audit Log displays the history of changes to your Schedule. It can be accessed from the More icon located on the right side of the bottom navigation bar.

Preferences

Preferences are user specific features of Schedule Builder that can be turned on or off. They are located in the upper right navigation bar with your name next to the icon. The preferences are as follows:

Auto Fill – remembers the most recent values entered for the product based on agency (Line Notes are not stored). Tab out of the catalog number field to call the function.

ABL Auto Complete Catalog # - Auto completes catalog entry based on sales history

Non-ABL Auto Complete Catalog # - Auto completes based on product list entered for the Non-ABL manufacturer

ABL Product Validation Exception – Identifies why product is not validating
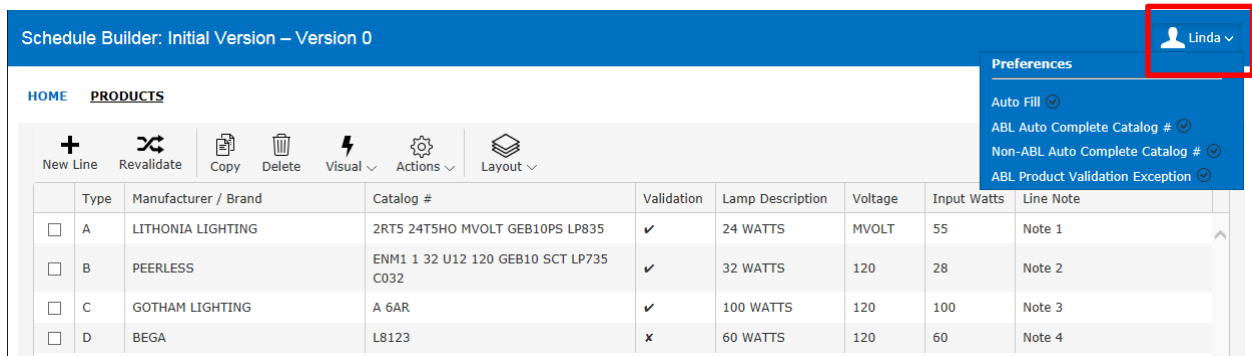
Keyboard shortcut (Hot Keys)

ALT N creates a new schedule when on the Schedule Dashboard

ALT N creates a new line when on the Schedule
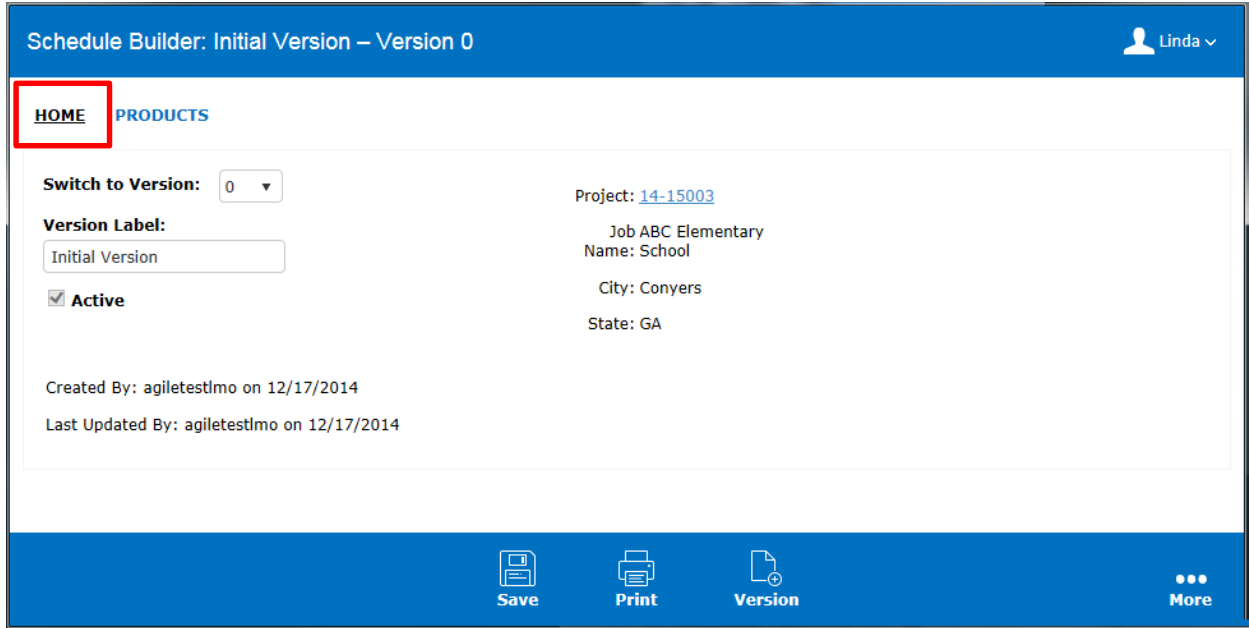
ALT P brings up your Print Schedule dialog

ALT S saves your Schedule

ALT R revalidates your Schedule

Shift Tab goes to previous field

Home

The Home section is where you can switch between versions, rename versions, and change which version is the Active version. You can also find basic project information, such as Project #, Job Name, and location.


Unlock Records

If another user has a Schedule locked, it can easily be "unlocked" by clicking the lock symbol from the dashboard. Any unsaved changes will be discarded.
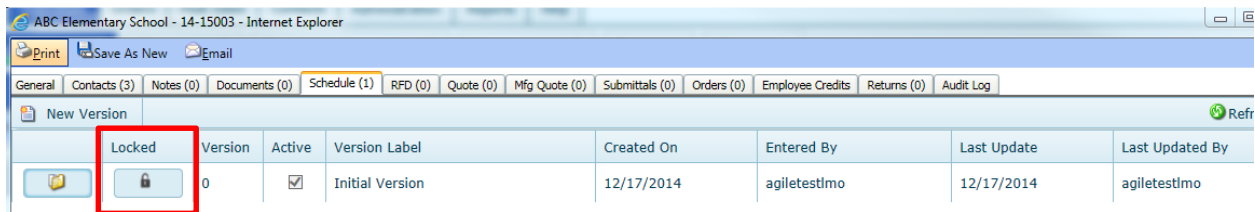
Importing a Schedule into a Quote

From the Quotes tab of your project, click the I**mport Schedule** icon, choose the schedule you want to import, then click **OK**. If there are multiple versions of the schedule, you will see all versions and will choose which schedule you want to import. All lines from your schedule will be imported into the Quote.
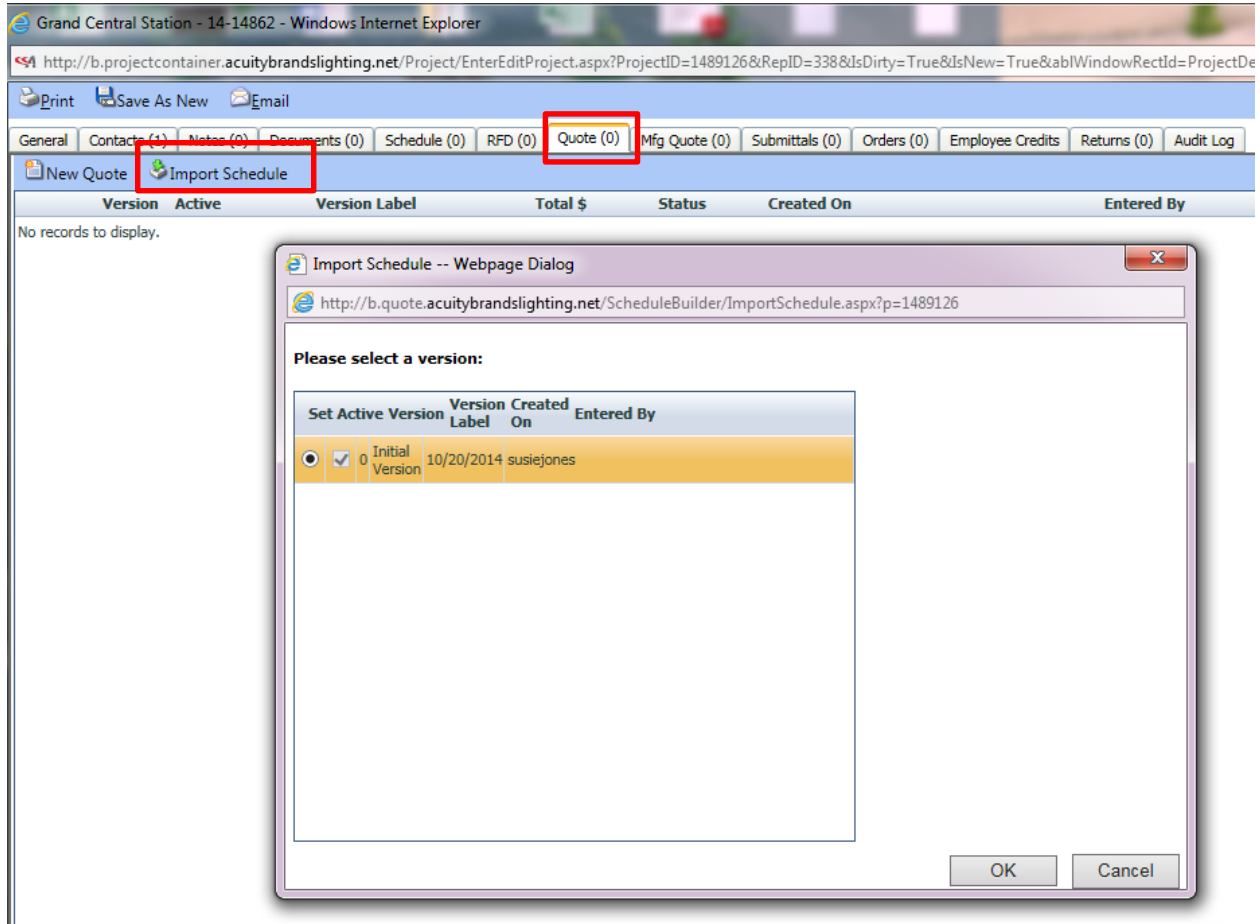
Importing a Schedule into a Submittal

From the Submittals tab of your Project Container, click the **New** icon and then the **Schedules** tab. Choose the Schedule you want to import. If there are multiple versions of the schedule, you will see all versions. Lines from your schedule will be imported into your Submittal (note: only valid manufacturers will return spec sheets).