

Getting Started

A typical QuantBIM workflow, step by step — from opening an IFC project to validation, saving, and export.

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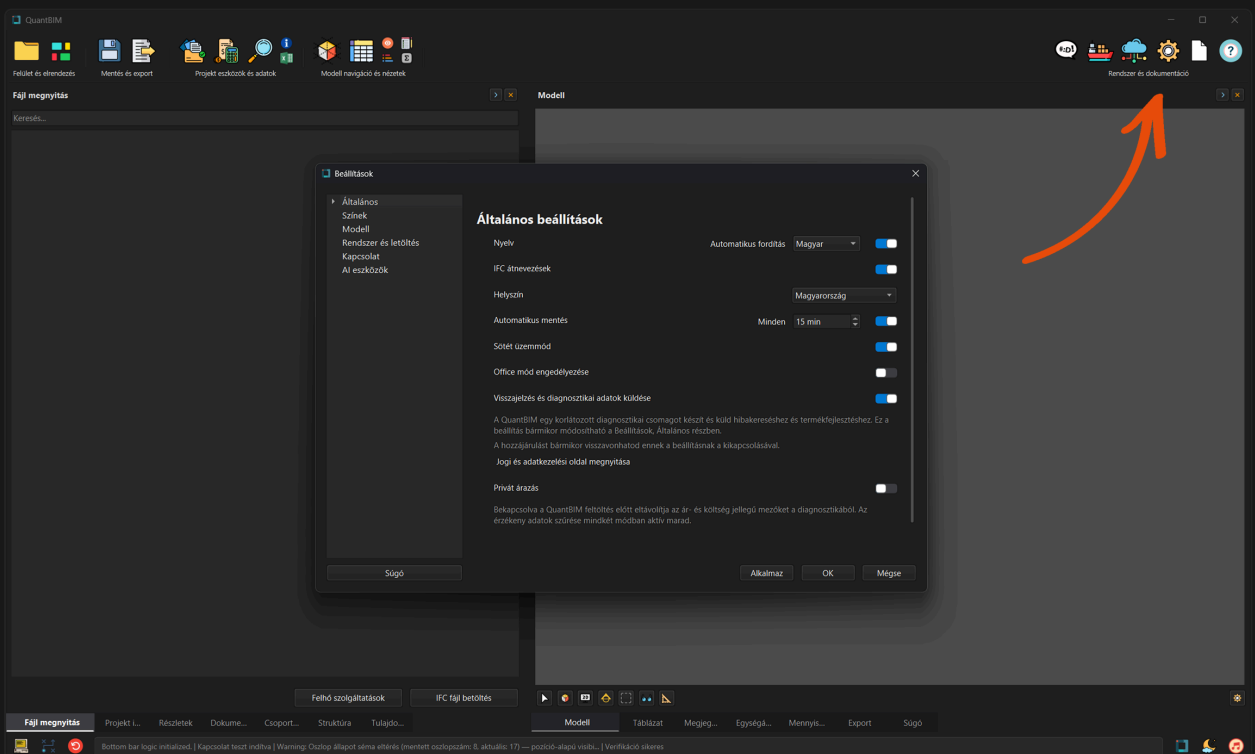
Help (Don't Panic)

This guide walks you through a typical QuantBIM workflow. The aim is to load an IFC or QuantBIM project, create a group, assign a category and a quantity, then check the result in Documents, save it, and export it.



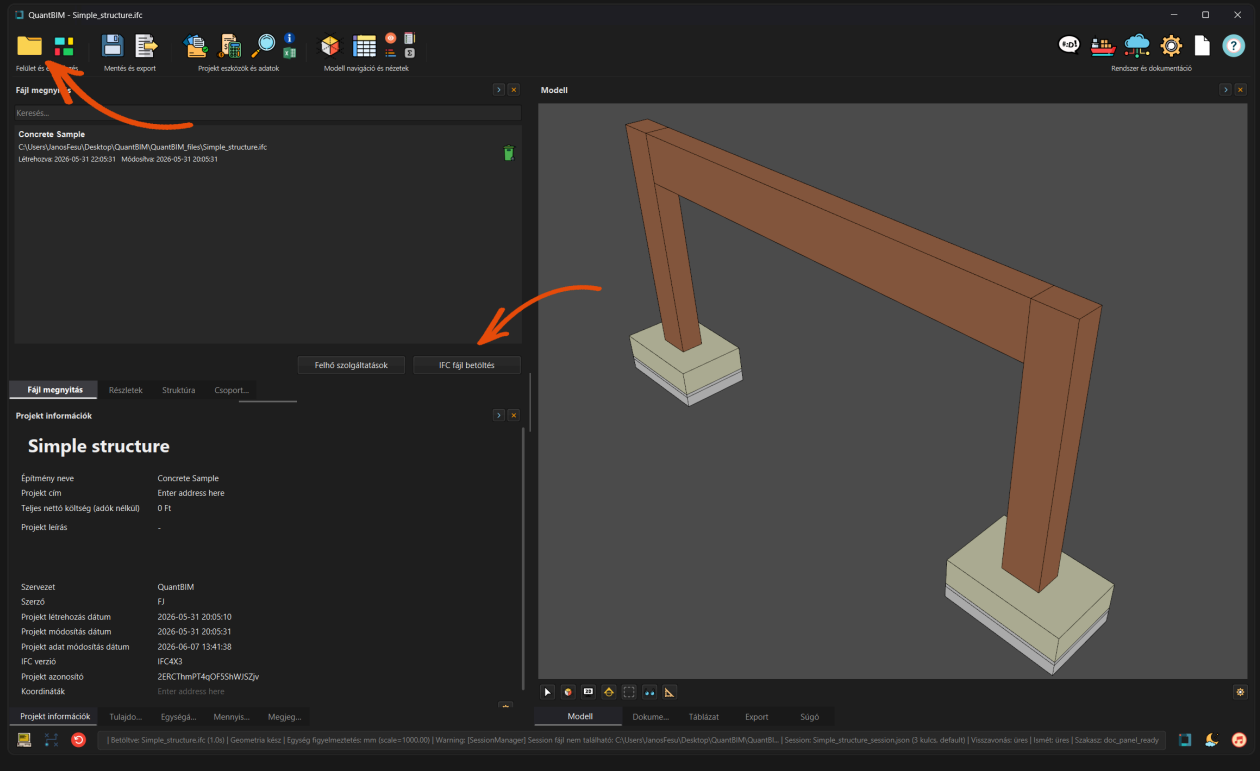
Initial setup before you begin

- Download the latest QuantBIM installer from quantbim.com/download.
- Open the **Settings** window in the top-right corner and check the core options (language, auto-save, diagnostic data sharing).
- Use the **Detailed documentation** shortcut here when you want step-by-step guidance for a specific panel.
- Setting these up at the start makes your first project workflow more stable and easier to follow.



01 Open project

- Open the project from the **Open File panel** (Dock panel selector).
- You can directly open IFC files and full QuantBIM project packages (`.qbim`).
- `.qbimref` is a data-only package: first open the matching IFC project, then import or merge it from the Export panel.
- In **Recent files**, single-click shows basic details in **Project Information**; double-click loads the project.



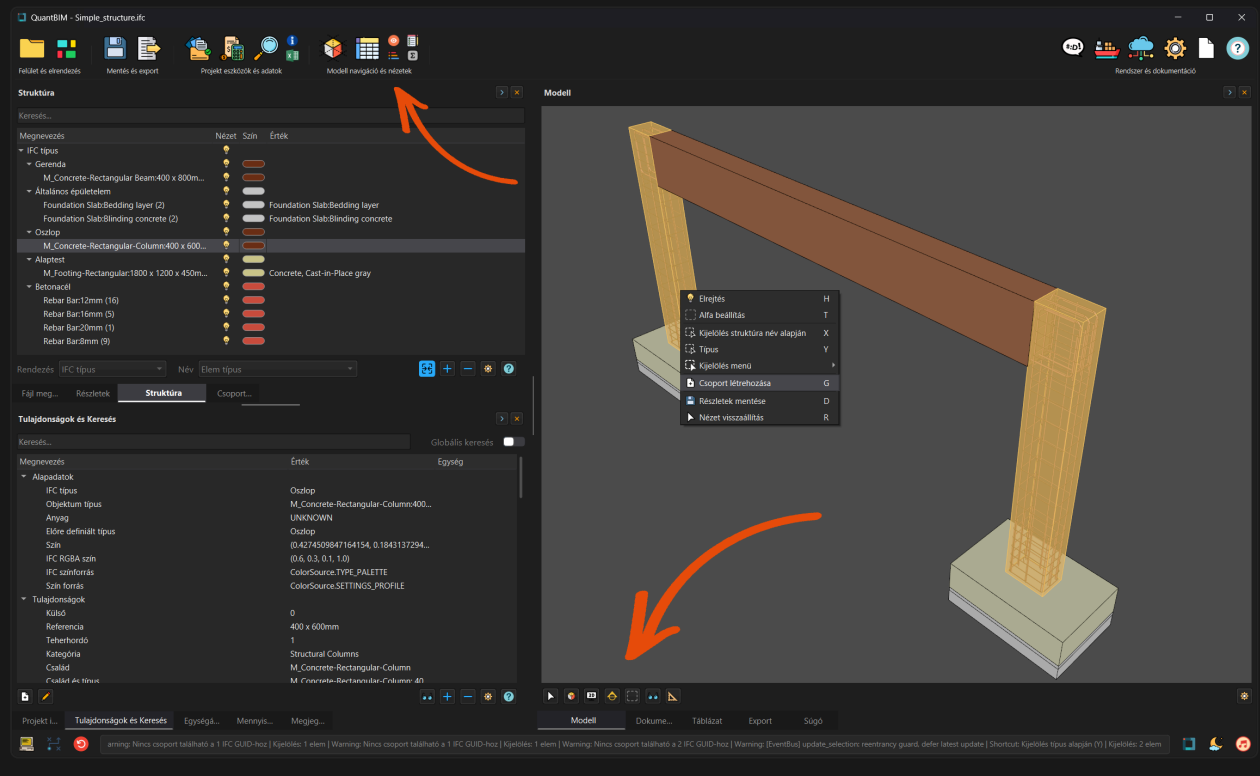
SHORTCUTS

Ctrl+S

Save project

02 Review model and data

- In the **Model** panel you can view the 3D model; in **Structure** you can browse elements in IFC hierarchy.
- The **Properties** panel shows selected element data; for multi-selection it shows shared properties. Use the glasses icon on the bottom bar to display mixed values as well.
- The model view also includes section tools, exploded view, transparency controls, and measurement tools.

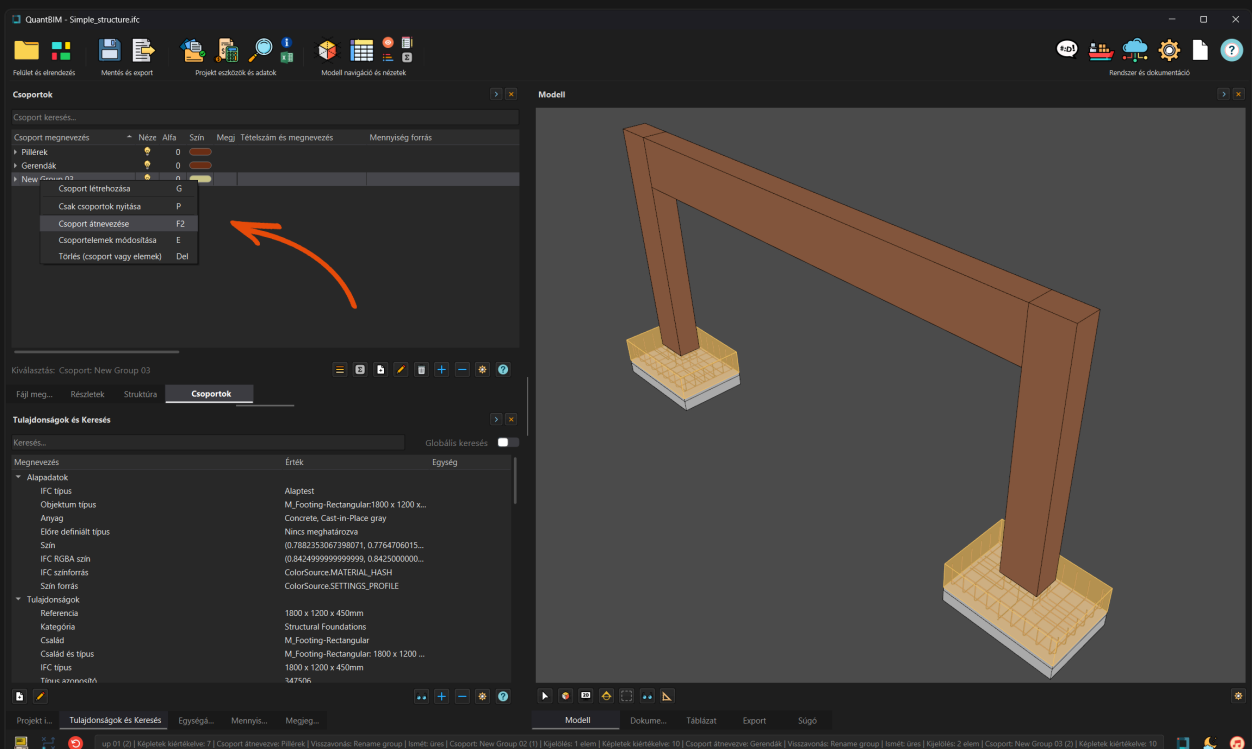


SHORTCUTS

F3	Properties and Search global focus	Shift+drag	Box selection
Ctrl+F	Search focus (panel-dependent)	S	Show/hide section handles
Ctrl+click	Multi-selection	T	Apply transparency
G	Create group	Ctrl++ / Ctrl+-	Increase / decrease explode
Esc	Clear selection	Arrows	Camera orbit
D	Save detail view	Shift+Arrows / Ctrl+Up-Down	Camera pan / zoom

03 Create group

- From one or more selected elements, you can create a group both in **Model** (right-click or **G**) and in **Group View** (right-click **Create group** or **G**).
- Rename a group via right-click or **F2**; you can create an empty group without selection, and delete the selected group with **DeL**.
- You can rearrange groups freely with drag-and-drop, and apply colour and transparency settings at group level.
- The model view also offers section cuts, exploded view, transparency control, and measurement tools.



SHORTCUTS

G Create group

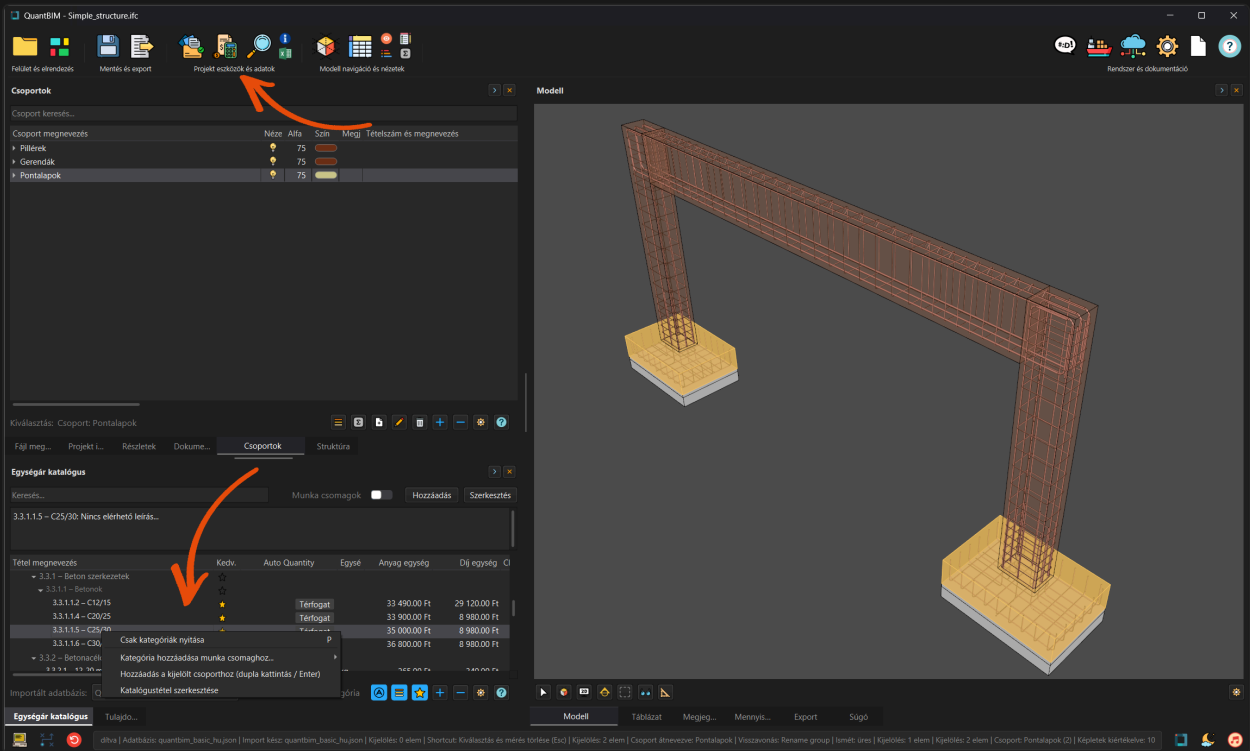
F2 Rename selected group

DeL Delete selected group or remove elements

P Show parents only

04 Assign category

- Open the **Unit Rate Catalogue** panel and find the category or item you want to assign.
- In **Group View**, select the target group (the bottom bar shows the active selection), then select the row you want in the catalogue.
- Assign with double-click or **Enter**. Only rows with a valid unit rate can be assigned; folder/section/header rows cannot.
- If you do not yet have an imported unit-rate catalogue, you can download a sample, import it, use the built-in database, or create your own catalogue.
- **AutoQuantity**: enabled from the Unit Rate panel. When enabled, the programme remembers quantity mapping for the category and applies it automatically on later category assignments.
- You can clear the AutoQuantity field with double-click. When disabled, no automatic quantity is added to the category.

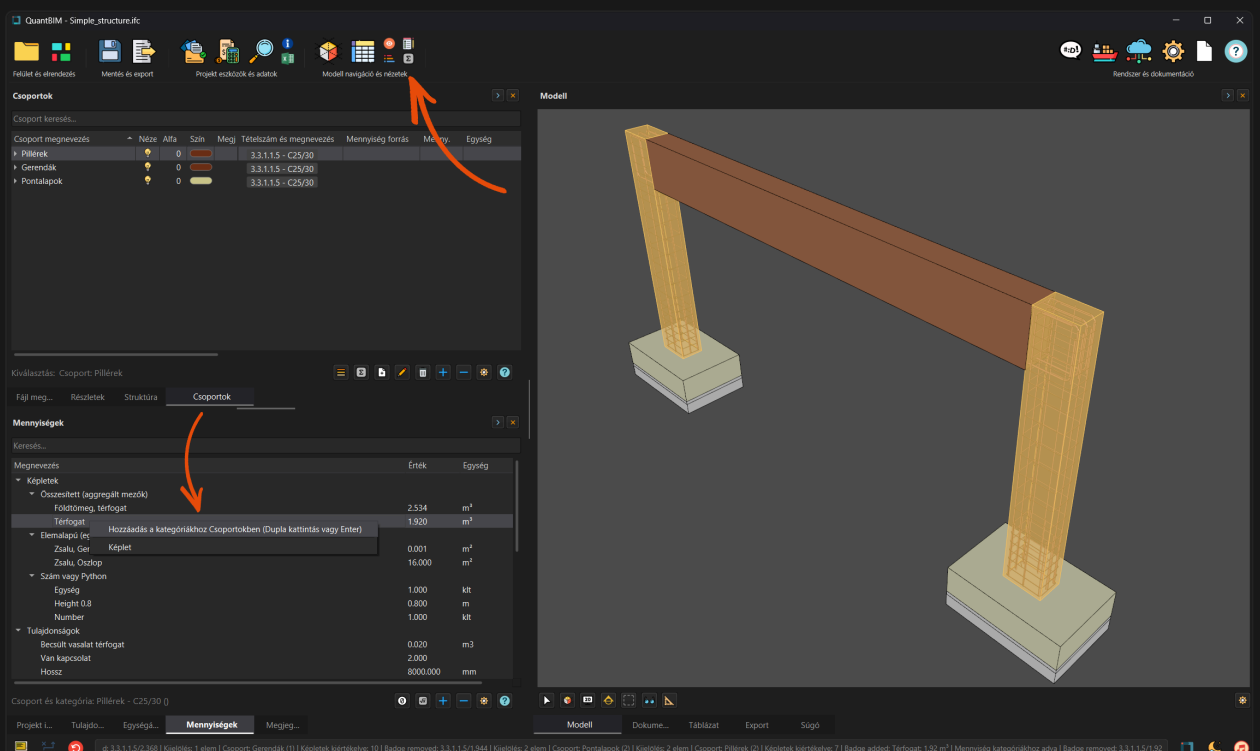


SHORTCUTS

Enter	Assign selected item row	G	Create work package (Work packages mode)
Double-click	Remove selected label	F2	Rename work package
Ctrl+Shift+N	Add new item	Del	Delete work package

05 Assign quantity

- To assign quantity to a category, select the category in **Group View** (active selection is shown on the bottom bar), then switch to **Quantities**.
- Use **Enter** or double-click to assign a quantity or formula row; the assigned value is calculated from the selected group data.
- **Formula:** for custom edited quantities, use Formula expressions. You can build your own formulas from existing data for the selected group.
- **AutoQuantity:** enabled from the Unit Rate panel. Once enabled, quantity mapping is remembered and re-applied automatically when categories are assigned later.
- You can clear the AutoQuantity field with double-click. When disabled, the system does not add automatic quantities to categories.



SHORTCUTS

Enter

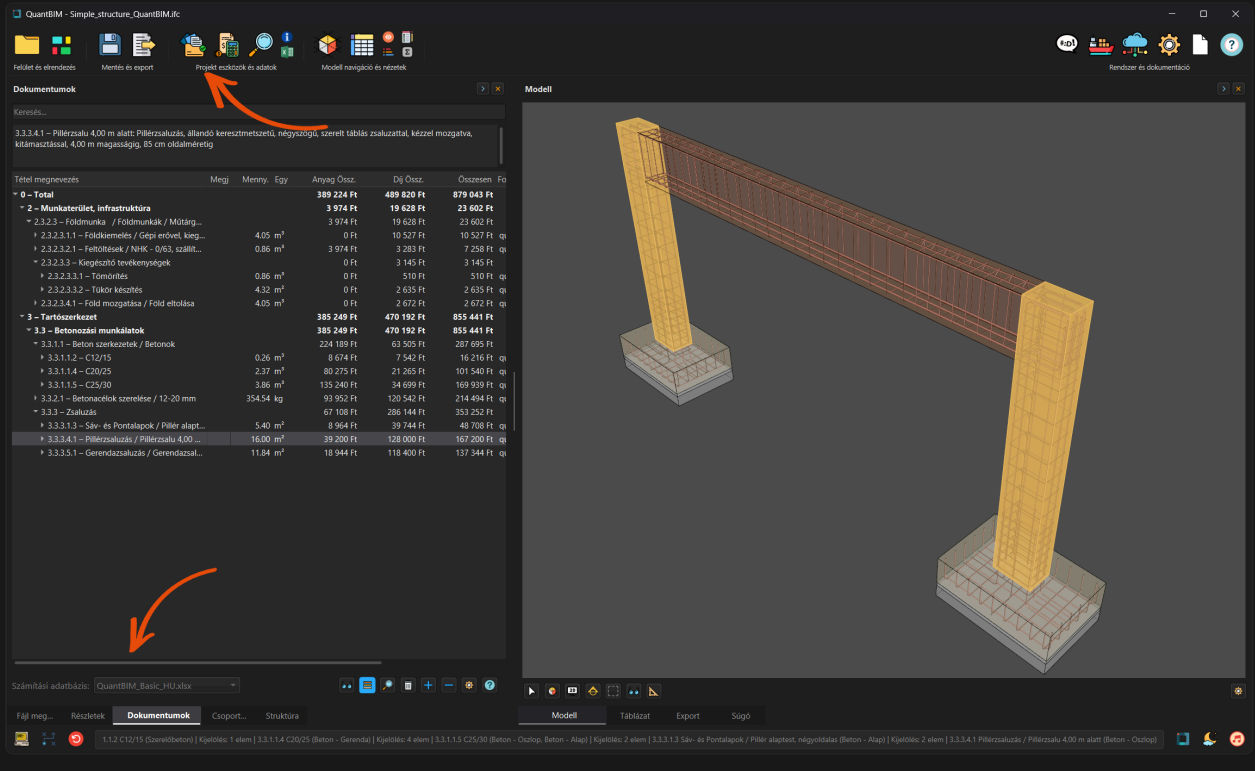
Assign selected quantity row

Double-click

Remove selected label

06 Review results

- The **Documents** panel displays the calculated cost structure. Use **Memory** mode (mixed source) or choose a specific calculation database.
- In the **Documents** panel, you can delete a specific cost row by double-clicking it. This only removes the quantity assignment in **Group View**; the category assignment remains.
- If a row shows *No data*, it usually means price, quantity, or database mapping is missing, or a filter is hiding details.
- Use the **Schedules** panel to inspect elements and fields behind the selected group or document row.

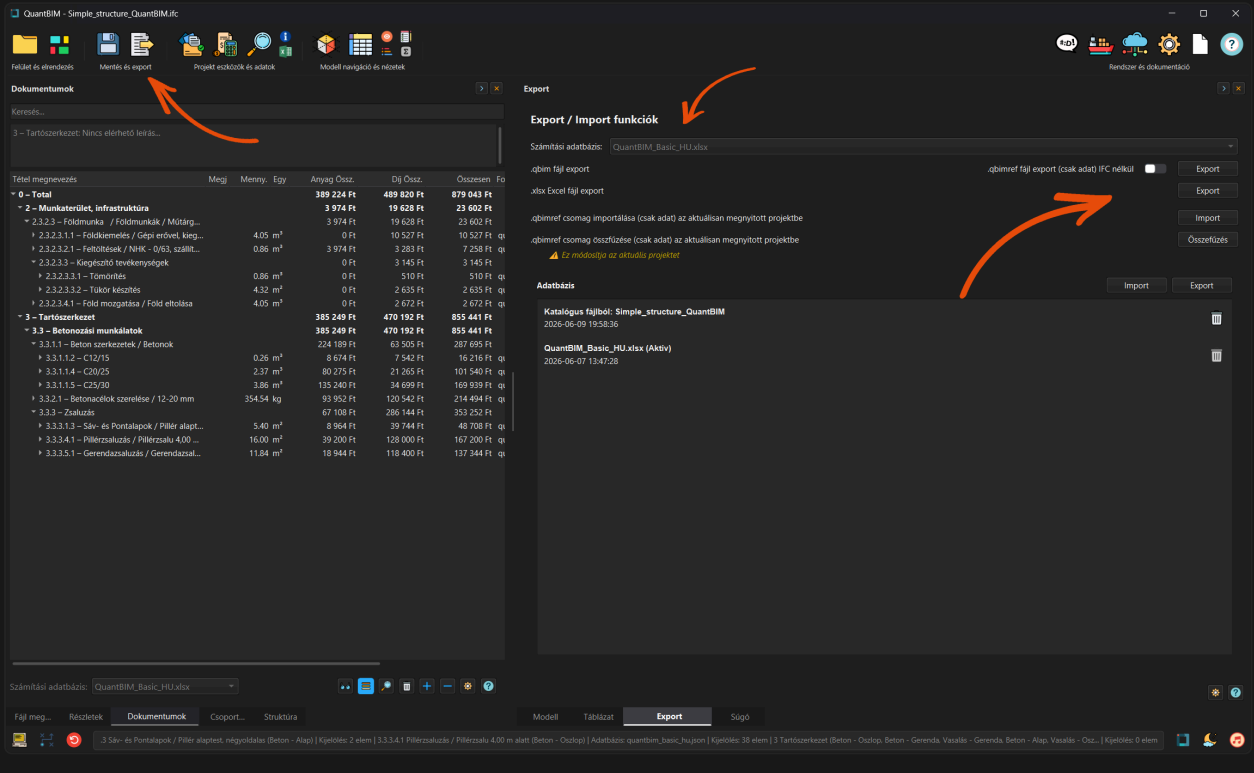


SHORTCUTS

- P Expand document tree to group/category level

07 Save and export

- Save your session using the **Save project** button in the top bar.
- In **Export**, you can create a full `.qbim` project package, an IFC-free `.qbimref` data package, or an Excel (`.xlsx`) export.
- `.qbimref` import/merge only runs for the same compatible IFC model (identifier check).
- You can also manage unit-rate database import/export here; Work packages can be transferred on a separate worksheet.



SHORTCUTS

Ctrl+S

Save project

Ctrl+E

Open Export panel

08 If something does not appear

- Check whether there is an active group, whether a category is assigned, and whether the category has an assigned quantity.
- Check search fields, visibility icons, row filters, and missing-data filters in Documents. Search only filters; it does not delete data.

SHORTCUTS

F3 Properties and Search global focus

Ctrl+F Active panel search focus

F1 Open Help

F10 Open Settings

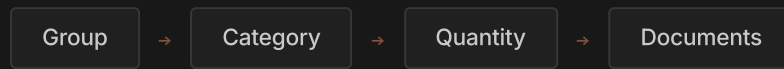
09 Recommended first workflow

1. Open an IFC file or a `.qbim` project.
2. Select elements in the Model.
3. Create a group in Group View.
4. Assign a category from the Unit Rate Catalogue.
5. Assign quantity from the Quantities panel, or use AutoQuantity.
6. Review the result in Documents and Schedules.
7. Save the project, then export a `.qbim`, `.qbimref`, or `.xlsx` file.

10

Important notes

The estimating workflow follows the same order across panels. If one step is missing, the next view may appear empty or incomplete.



- **Selection order:** category assignment requires an active group; quantity assignment requires the selected category under that group.
- **Assignment rules:** only item rows are assignable; folder/section/header rows are not, and the Value field must contain a valid number.
- **AutoQuantity:** if a catalogue row has a default quantity, the system can fill it automatically, but this can be overridden at any time.
- **AutoQuantity clearing:** the AutoQuantity field can be cleared by double-click; when disabled, no automatic quantity is added to categories.
- **Work packages:** in Work packages view, you can assign the full category set of a package to the active group in one action (double-click or `Enter`).
- **Formula:** in Formula view, you can build custom quantity formulas from existing group data; circular references produce errors.
- **Documents panel:** without price, quantity, and database mapping, the row remains in *No data* state.
- **Deleting cost rows in Documents:** double-click removes the selected cost row; this clears only the quantity assignment and keeps the category assignment in place.
- **Search and filters:** filters only hide rows; they do not delete data.
- **Detailed help:** open the **Help** panel with `F1`. You will find detailed topics for Group View, Unit Rate Catalogue, Quantities, Documents, Formula, AutoQuantity, Work packages, Export, and Search.
- **Backup:** before import, merge, or delete operations, always create a full `.qbim` save.

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