

Creating Custom Schedules

Reference Number: **KB-03120**

Last Modified: **May 7, 2024**

The information in this article applies to:



QUESTION

How do I create a completely custom schedule and specify what objects are included in that schedule?

ANSWER

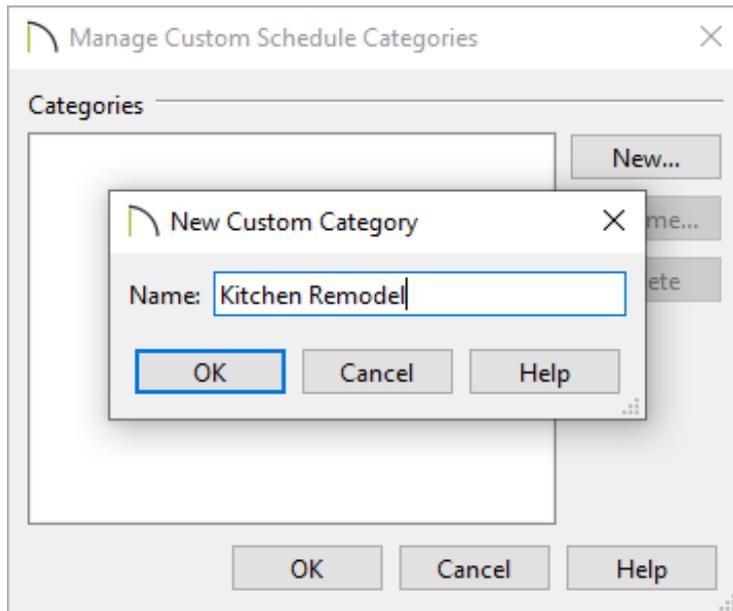
Use custom categories along with the Custom Schedule tool to create a completely custom schedule that can consist of multiple objects of different types. For example, you can combine different objects, such as specific cabinets, fixtures, etc, into a custom category, which can then be reported by a custom schedule. This could be helpful in an event such as a kitchen remodel.

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Creating or managing custom categories

1. Navigate to **Tools> Schedules> Manage Custom Categories**  .
2. In the **Manage Custom Schedule Categories** dialog that displays, click the **New** button and provide an appropriate name for the category.

In this example, "Kitchen Remodel" is specified.



- You can also manage any custom categories that have been created.
- Click on a category and select **Rename** to give it a new name, or **Delete** to delete it from the plan.

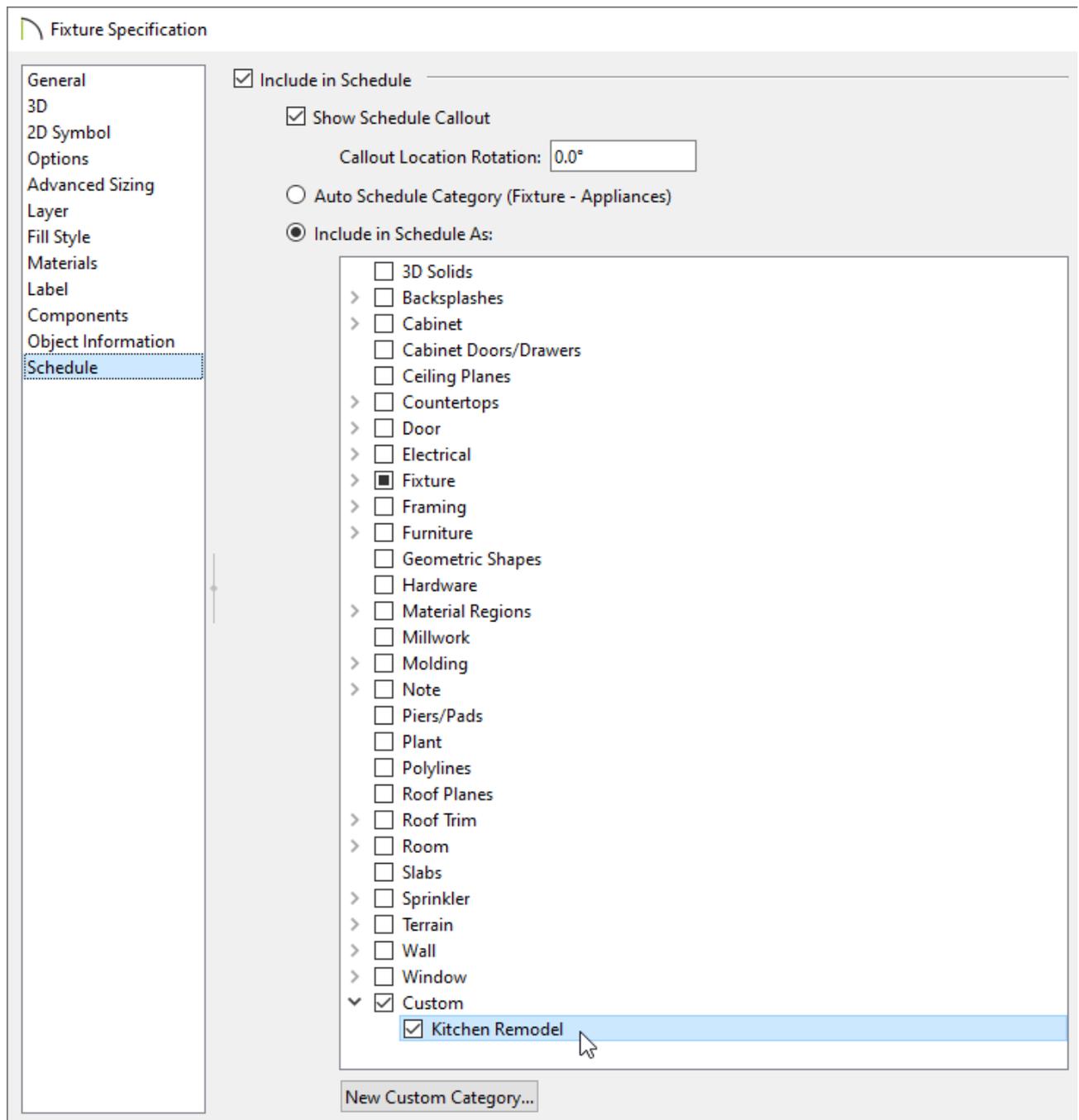
If objects are assigned to display in a custom category, and the custom category is then deleted, the object may no longer appear in any type of schedule until you open the object and assign it to display in a new category. Please see the next section on [Adding objects to a category](#) to learn more.

Adding objects to a category

1. Click on an object that you would like to be a part of a custom category, then click on the **Open Object**  edit button.

The objects that can be included in schedules has expanded through the versions. For example, in X14 and newer, polylines can be included in schedules, and in X16 and newer, ceiling planes and 3D solids can be included in schedules.

2. In the **Specification** dialog that displays, click on the **SCHEDULE** panel, select the **Include in Schedule As** radio button at the top, then place a check in your desired custom category.



Objects can be assigned to display in multiple different categories. For example, a single cabinet object can be set to be displayed in the Cabinet category, as well as a Custom category. This allows a single object to appear in multiple schedules at once.

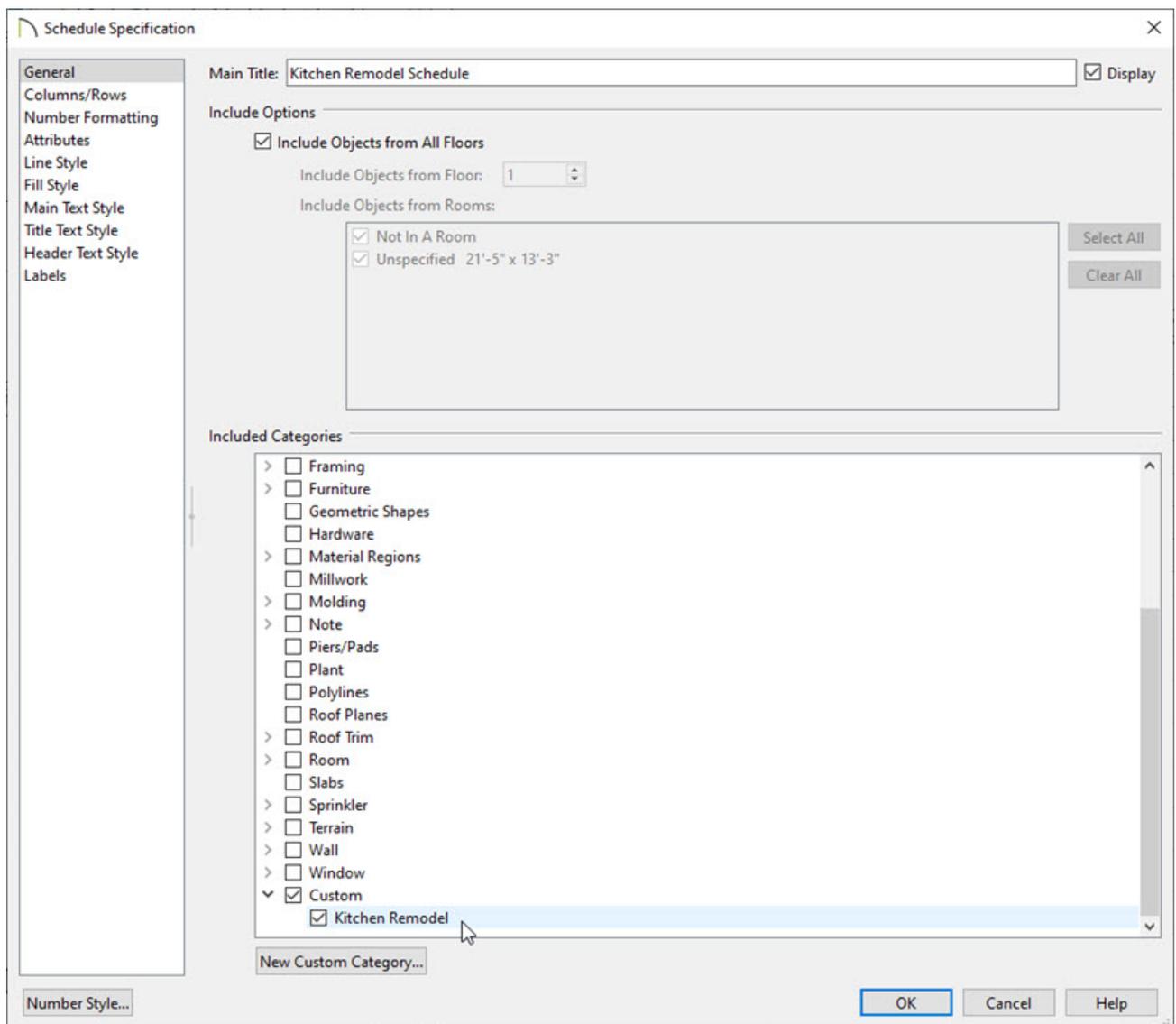
3. Perform this same procedure for any and all objects that you would like to be associated with this category.

Creating a Custom Schedule

1. Navigate to **Tools> Schedules> Custom Schedule**  and click to place a schedule in your desired location.

We highly recommend creating schedules within the separate Schedules Detail window. This window can be located and opened by accessing the **Project Browser**  and expanding the CAD Details folder, or by navigating to **CAD> CAD Detail Management** .

2. Once placed, select the schedule using the **Select Objects**  tool, then click the **Open Object**  edit button.
3. On the **GENERAL** panel of the **Schedule Specification** dialog that displays:



- Specify the **Main Title** for the schedule.
- Select if objects from all floors should be included or a specific floor or room.

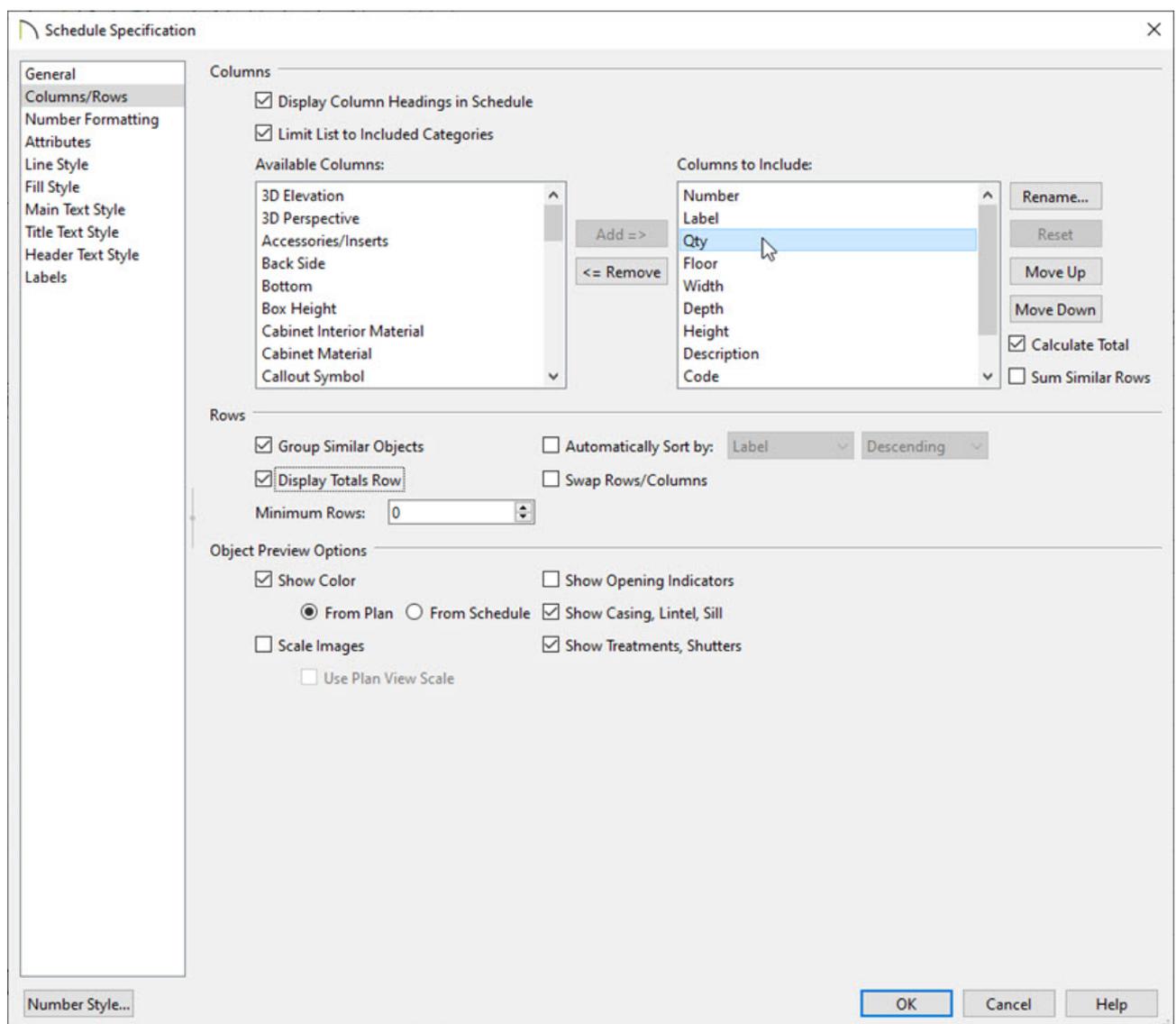
In X16 and newer, you can select multiple specific rooms.

- Pick and choose what categories you would like to include in the schedule.

In this example, we chose the "Kitchen Remodel" custom category that was created earlier in the article.

4. On the COLUMNS/ROWS panel of the **Schedule Specification** dialog that displays:

In X15 and prior versions, the column and row selections are on the **GENERAL** panel.



- Choose the Columns that you would like to be included in the schedule.

In X16 and newer, highlight an included column and choose to **Calculate Total** and **Sum Similar Rows**, if desired.

- Select to **Group Similar Objects** and **Display Totals Row**, as needed.
- If desired, check the **Swap Rows/Columns** box to swap the position of column headings with row headings.
- Make any other wanted adjustments to the Display and Object Preview Options. For more information on these options, click the **Help** button at the bottom of the dialog to open your program's documentation.

5. Navigate to the **MAIN**, **TITLE**, and **HEADER TEXT STYLE** panels to change the text properties associated with the schedule.

In legacy versions, only the **TEXT STYLE** panel is available, which affects all text within the schedule.

6. On the **ATTRIBUTES** panel, make adjustments as desired to the display of the Border and Grid Lines.

In X16 and newer, adjust the Alignment within the columns and rows.

7. Make any additional adjustments, such as to the **LABELS** or **FILL STYLE**, then click **OK**.
8. Any objects that were assigned to display in the custom category will now display in the schedule.

KITCHEN REMODEL SCHEDULE				
<i>NUMBER</i>	<i>LABEL</i>	<i>QTY</i>	<i>FLOOR</i>	<i>DESCRIPTION</i>
G01	R36"	1	1	DOUBLE DOOR REFRIGERATOR 1
G02	B48	1	1	BASE CABINET
G03	B24R	1	1	BASE CABINET
G04	DUPLEX	3	1	DUPLEX

Saving a schedule to the library*

*Applies to Chief Architect X16 and newer program versions.

1. Open the **Project Browser**  and expand the Schedules folder.
2. Right-click on the desired schedule and click the **Add to Library**  edit tool.

Related Articles

 [Creating a Plumbing, HVAC, or Appliance Schedule \(/support/article/KB-00929/creating-a-plumbing-hvac-or-appliance-schedule.html\)](/support/article/KB-00929/creating-a-plumbing-hvac-or-appliance-schedule.html)

 [Removing Duplicate Callout Labels \(/support/article/KB-02968/removing-duplicate-callout-labels.html\)](/support/article/KB-02968/removing-duplicate-callout-labels.html)



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