



Esti-mate Training Course

Introduction

This two day course is designed to provide the user with a broad overview and a basic understanding of the core functions on the use of the latest Esti-mate Estimating system as a tool in their everyday estimating duties.

The course is equally suited to those who have no prior experience of computer estimating and those who have previous experience of using other systems

The course will show the user how to:

- Prepare a project
- Take off quantities
- Price work Items
- Price using subcontractors and lump sums
- Import electronic files in various formats
- Calculate profit and overheads
- Print out reports
- Obtain detailed analysis reports
- Backup and Restore Estimates

Participation will equip users with the skills to prepare and complete an Estimate swiftly and accurately.

Intended for:

- Estimators, Quantity Surveyors and any other person that has a responsibility for estimating/costing for construction projects

Pre-requirements:

- Basic working knowledge and understanding of computers including basic keyboard and mouse skills
- Assumes working knowledge of Microsoft Windows.
- A good working knowledge of the principals of estimating is essential.

The following Schedule is to be used as a Guide Only. During the course it may be necessary to deviate from the order shown to add relevance to the content of the course.

The data used throughout this training course may differ from the data installed on your own systems.

During each day there will be Morning, Lunch and Afternoon breaks. These will be taken to suit the timing of the section or exercise being worked on. As an indication we will aim for the following times.

10:00	Start (9am on day 2)
11:15 – 11:30	Morning Break
13:00 – 13:30	Lunch Break
15:00 – 15:15	Afternoon Break
16:30	Finish



ESTI-MATE TRAINING - DAY 1

Overview

Logging On

Esti-mate Home Page with Project Register

Drop Down Menus

System Setup

- Selecting Utility Options

- General

- Profit

- Colours

- Units Map

- User Details

- Advanced

Creating a New Estimate

- Project Types

- Project Status

- Project Register

- Filtering

- Project Value

- Adding a New Estimate

- Estimate Details

- Versions

- Locking Clients BoQ

The Estimating Desktop

- The Desktop

- Hot Spots

- Menus and Icons

Bill Production

- Creating a New Bill

- Create New Section

- Adding Items from the Library

Exercise 1 - Creating a New Estimate

Item Types

- Priced Items (additional Item types)

- Text Only Items

Editing Bill Information

- Editing Bills and Sections

- Editing Item Text

- Change Item Types



Copying and Deleting, Items

- Copying Items
- Moving Items
- Deleting Items

Working with Marked/Flagged Items

- Copying Items
- Moving Items
- Deleting Items
- Flags
- Attaching/linking drawings & documents

Exercise 2 - Garage Take Off

Measurement

- Standard Dimensions Pad
- Global Dimensions
- On Screen Take-Off
- Copying Dimensions
- Deleting Dimensions

Priced Library Items

- Rate Build-up
- Constant
- Output
- Rate
- Value
- Item Quantity
- Item Value
- Waste
- Multiplier/Factor
- Substitute Resources
- Copy/Paste Rate Build Up

Resources

- Resource Groups
- Adding Resources to a Build-up
- Creating a New Resource
- ScratchPad Resources
- Non-Standard Resources
- Deleting a Resource

Backup and Restore

- Backup Estimates
- Restore Estimates

Other Item Types

- Composite Items
- Prime Cost Sums, Provisional Sums and Dayworks

Importing Electronic Bills of Quantities and Documents

- Importing an Excel or Text File (CSV, ASCII)



Copying Rates and Build-ups

- Copying Rates from the Pricing Library
- Copy Previous Build-up
- Copy Build-up from Other Items and Estimates

Other Resource Functions

- Bulk Allocate Resources
- Substitute Resources
- Removing Resources

Activities

- Creating Activities

Pricing an Imported Bill of Quantities

Exercise 4 - Pricing an Imported Job

Review of Day 1

Questions and Answers

End of Day 1



ESTI-MATE TRAINING - DAY 2

Re-cap of Day 1

Exercise 3 - Repeat Exercise 1

Subcontractor and Materials Enquiries and Comparisons

- Subcontractor Register
- Filtering
- Markup
- Creating enquiries when you don't have a BoQ
- Enquiries
- Sending the Enquiry
- Comparison
- Own Rates
- Analysis
- Trade discounts (MCD) and fixed price
- Updating the Estimate with S/C Rates
- Using Subcontractor Rates and Prices

Exercise 5 - Creating a Labour Only Subcontract Package

Analysis of Estimate

- Resource Adjustments and Markup
- Rates
- Waste Factors
- Buying Quantities/Rates

Find Items

- Finding and Pricing Items

Tender Adjudication and Tender Adjustments

- Measured Work Items
- Other Item Costs
- Recovery Element
- Contribution

Reports

- Standard Reports

Tender Adjudication

- Resourced Items
- Subcontractors
- Provisional Sums/PC Sums/Dayworks
- Preliminaries
- Margin
- Final Adjustments
- Applying 'on-costs' to the BoQ

Exporting Information

- Exporting to CITE
- Exporting to CSV



esti-mate

Library Maintenance
Overview

Review of Day 2

Questions and Answers

End of Day 2