



## Esti-mate Training Course - Electronic Bill Import

### Introduction

This one 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 together with specific training on Importing and Pricing electronic Bills of Quantities/Schedules of Work.

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
- Import electronic files in various formats
- Backup and Restore Estimates

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

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.

<b>10:00</b>	<b>Start</b>
<b>11:15 – 11:30</b>	<b>Morning Break</b>
<b>13:00 – 13:30</b>	<b>Lunch Break</b>
<b>15:00 – 15:15</b>	<b>Afternoon Break</b>
<b>16:30</b>	<b>Finish</b>



## **Esti-mate Training Course - Electronic Bill Import**

### **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**

- Dimensions
- 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

## **Exercise 4 - Pricing an Imported Job**

### **Review**

### **Questions and Answers**