IntelliBid Installation and Getting Started Guide

Contacts

Mailing and Shipping

592 Harvey Road
Manchester, NH 03103

Phone

Main Office	**603 437-9353**
Sales	**603 437-9353 ext 1**
Technical Support	**603 437-9353 ext 2**

Email

Technical Support	**support@conest.com**
Sales Department	**sales@conest.com**
Training Department	**training@conest.com**

Internet

ConEst Website	**www.conest.com**
Online Service Center for Download and Key Resets	**bbs.conest.com**

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Chapter 1

Installation

Introduction

From residential to heavy commercial, from structured cabling (voice/data) to industrial construction, ConEst IntelliBid provides all the technology tools you need to generate accurate, consistent, winning bids. IntelliBid allows you to prepare takeoffs, summaries and bids as you normally would, but in a fraction of the time it takes to do them by hand.

IntelliBid includes a number of key tools that go beyond the standard audit trail, estimate summary and creating bid features found in less powerful estimating software. IntelliBid is equipped to handle any size project from a few hundred dollars to multi-million dollar projects.

- Industry-smart database of over 125,000 electrical, data cabling (voice/data), high voltage and low voltage material items; more than 75,000 pre-built assemblies with built-in assembly options.
- The Structured cabling portion of the database has more than 50,000 structured cabling material items for your data and communication projects.
- In addition to the extensive database of materials and assemblies delivered with IntelliBid, you can customize the database by adding material items and assemblies specific to your business and type of construction.
- Update material prices from your supply house for your bid or the database over the Internet. (Subscription required for Epic, NetPricer or Tra-ser; sold separately through each company with participating vendors).
- Supports unlimited vendor pricing per item.
- With built-in Automatic Labor Factoring you can edit to reflect your experience in performing jobs under certain conditions will adjust labor installation time automatically for floor, elevations and multiples being installed or length of run (i.e. branch and feeder runs).
- Smart Substitution allows you to experiment with value engineering with built-in NEC tables that automatically resize conduit and wire in accordance with code requirements.
- Count Sheets provide an easy method of entering material quantities from drawings that can be entered into the Audit Trail.
- Temporary Assemblies can be created 'on-the-fly' during takeoff; later they can be saved to your permanent database or discarded.
- Submit Bid Proposals and Change Order Proposals from Bid Recap.
- Email and track RFIs, Transmittals, Proposals and memos in Journal Messaging.

Quick Reference

System Requirements

Workstation Specifications

Operating Systems

- Microsoft Windows 10™, Microsoft Windows 8.1™ or Microsoft Windows 7™ , both 32 and 64 bit supported for all operating systems with the latest MS service pack/security updates

Processor

- Intel Dual-core, AMD, or compatible, 2 GHz (minimum), quad-core or higher recommended

RAM

- 4 GB RAM (minimum), 8 GB or more recommended

Free Hard Disk Space

- If both database and client will be installed on a single computer – Allow 11.5 GB (minimum) for the installation.
- If the client will be installed on a single computer and the database will reside on a server - Allow 1 GB (minimum) or more for the installation +10GB on the server.

Note: Additional drive space recommended to store job files created in SureCount.

Software Application and Components

For installation when Microsoft SQL Server databases are client-hosted (workstation has both client and database installed)

- Microsoft SQL Server 2014 and Microsoft SQL Server 2012. 32 and 64 bit versions of Enterprise, Standard, or Express Editions supported.
- Color Screen resolution 1920 x 1080 or higher recommended (96DPI for best results)
- Laser or ink jet printer recommended

Database Server Specifications - For running on a client/server configuration

Operating Systems

- Microsoft Windows Server 2012. Both 32 and 64 bit supported for all operating systems. *With latest MS service pack/security updates*

Note: Any Windows OS after Vista can act as a server.

Processor

- Multi-core Intel (Core 2, i3, i5, i7 Pentium D, Xeon) or Multi-core AMD (Phenom, Athlon X2, A series, FX series, Opteron, Sempron x2, Turion 64 x2) 3GHZ minimum

RAM

- 8 GB RAM (minimum), 16 GB or more (recommended)

Free Hard Disk Space

- 15 GB minimum

Note: Additional drive space recommended to store drawing files created in SureCount.

Software Application and Components

For installation when Microsoft SQL Server databases are client-hosted (workstation has both client and database installed)

- Microsoft SQL Server 2014 and Microsoft SQL Server 2012. 32 and 64 bit versions of Enterprise, Standard, or Express Editions supported.

Note: **ConEst** programs include Microsoft SQL 2012 Express Edition, with latest MS service pack/security updates.

ConEst recommends a dedicated database server for installing and running Microsoft SQL Server. If the server will be running additional applications, the recommended specification should be increased accordingly.

Virtual Environments

ConEst Software products are supported on most virtual environments as long as they can run on supported platforms. (See supported server platforms above) Mac OS is not supported with ConEst software products unless a supported Windows operating system is installed on the Mac using virtualization software such as VMware Fusion or Parallels.

Note: Hardware and software specifications listed in this document are for the use of SQL Server with the ConEst Software versions that were available at the time of publication. As newer system versions are introduced, ConEst reserves the right to update and modify these recommendations.

Prior to the Install

The installation process is similar for the Full Install, Client Install, Upgrade and SQL Server Only. If prerequisite software is missing, it is automatically installed. If a reboot is required after the installation of one of these prerequisites, the reboot is prompted. After a reboot, the install automatically launches and resumes from the point of the reboot prompt. **Please be patient** — it may appear as if nothing is happening for a brief period after the reboot and prior to resuming the installation. The time it takes to resume the installation is dependent on the pc and programs/ services set to automatically launch.

Prerequisites that will be installed if not present on the pc:

- Windows Installer 4.5 (part of Windows 7 and Windows 8.1)
- PowerShell (part of Windows 7 and Windows 8.1)
- .NET Framework 4.0 (This is a core component for Windows 7 and usually enabled. It may or may not be present on Windows 8.1. If it is not, it will be automatically installed.)

Note: Be aware that performing a Full Install or a Client Install WILL REQUIRE A REBOOT. Plan the install on your server accordingly. In addition the SQL Server Only Install may require a reboot depending on the environment.

Note: If you are installing on Windows Server 2012 or Windows Server 2014, you need to access Control Panel > Turn Windows features on or off to enable ".NET Framework 3.5" prior to running the installation. This is a Windows feature on these server operating systems and cannot be installed separately, and are most likely NOT installed on a server by default.

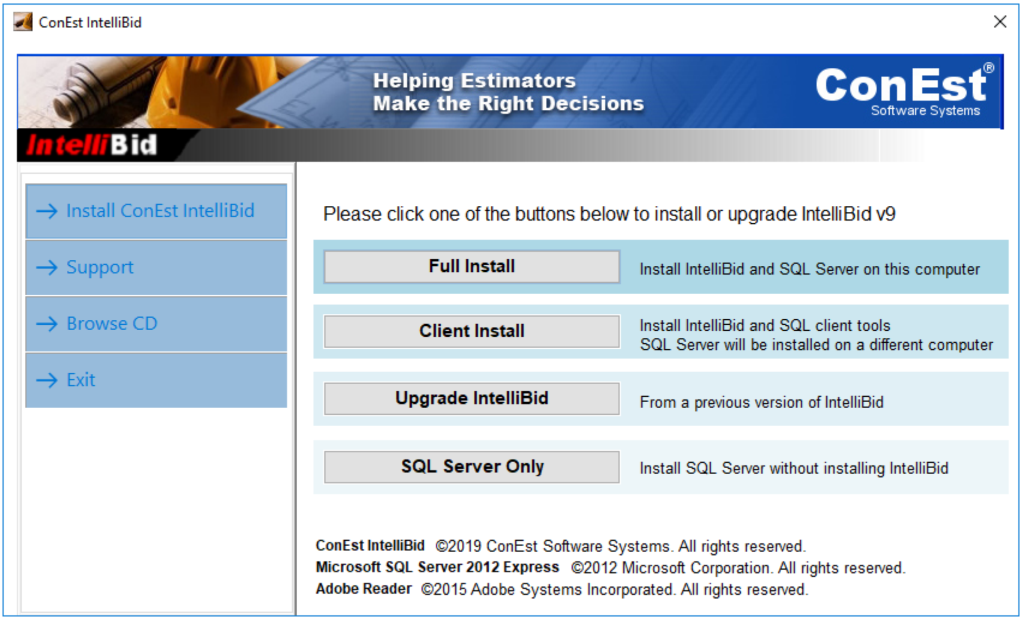
The software can be downloaded from the Online Service Center or you may have received a software package that includes an IntelliBid DVD. Customers can access the Online Service Center by creating an account.

Licensing is enabled using a software Server license. A USB key is available for single-license users who would like to run the software on more than one computer, for example on the office and a home computer.

Running the Install

1. Double-click IBLoader.exe from the download. IntelliBid. The IntelliBid installer launches automatically as shown in Figure 1-1.

FIGURE 1-1. IntelliBid Installer



2. Begin by selecting how you want to install SQL and the software:

- **Full Install** — Includes the required software, SQL Server 2012 and IntelliBid. Use this for single license installations. This will:
  1. Install SQL Server
  2. Update the system PATH variable so references to older versions of SQL will appear at the end of the list
  3. Install IntelliBid software

- **Client Install** — Includes the required software, SQL Client Tools and IntelliBid. Use this if you will be running IntelliBid on this computer and accessing the SQL database on a network server. This will:
  1. Install SQL Server Client tools
  2. Update the system's PATH variable so references to older versions of SQL will appear at the end of the list
  3. Install IntelliBid software

- **SQL Server Only —** Installs just the SQL Server. Use this to install the database on a network server for access from client computers.

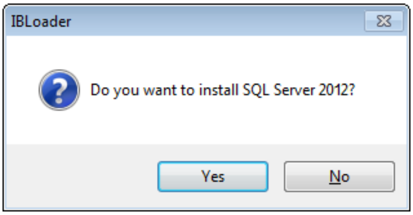
When you make your choice, the installation process for SQL starts. The Installation procedure checks for required software and installs the components it requires. At this point you should have selected **Full Install**, **Client Install** or **SQL Server only** from the Browser. Follow the instructions below for Full or Client Install.

Full Install

Installing **ConEst IntelliBid** checks for and installs *Windows Installer* and *Powershell* if either product is not present on your computer. If prompted to reboot, it is important to do so. The installation will restart at the next step.

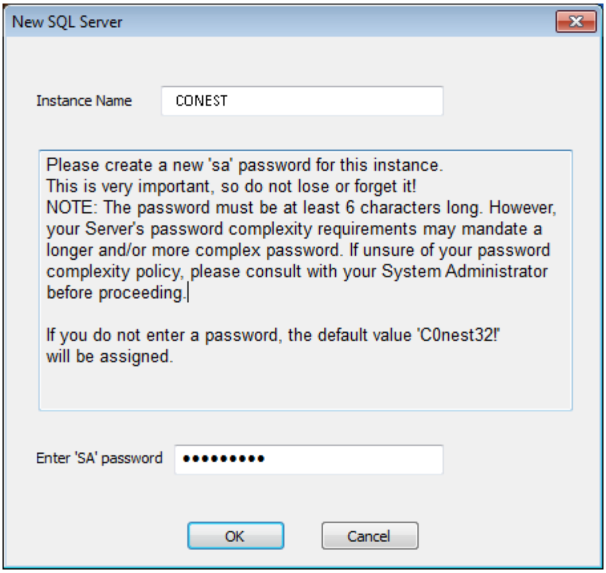
1. The *IBLoader* dialog box displays when SQL Server is not installed on your computer as shown in Figure 1-2.

FIGURE 1-2. IBLoader dialog box



2. If you need to install SQL Server, click Yes. This will display the *New SQL Server* dialog box as shown in Figure 1-3.

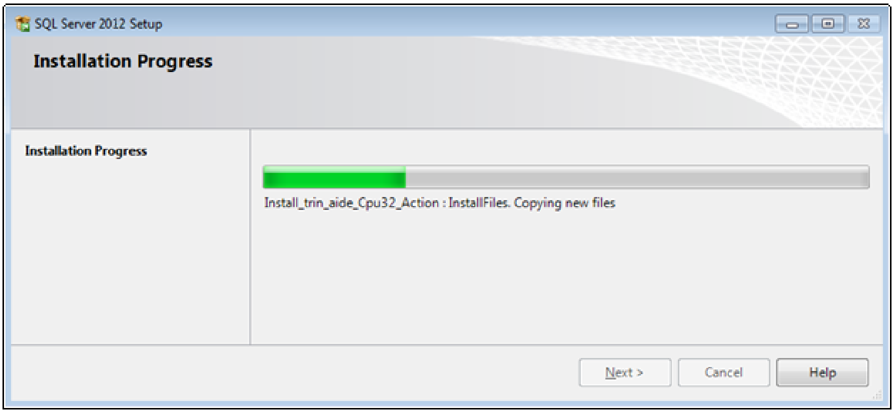
FIGURE 1-3. New SQL Server dialog box



Note: This is the 'sa' (system administrator) password. The password will be displayed one more time before the installation is complete. This password is important. Write it down and keep it somewhere safe. You WILL need it later.

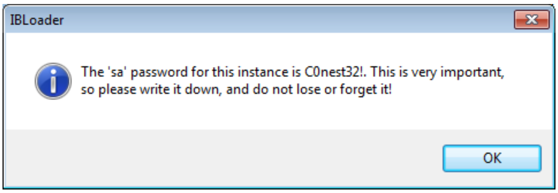
3. The SQL Install displays a series of SQL-related dialog boxes while installing SQL. No user input is required. The *SQL Server Setup* dialog box remains open during the installation as shown in Figure 1-4.

FIGURE 1-4. SQL Server Setup dialog box



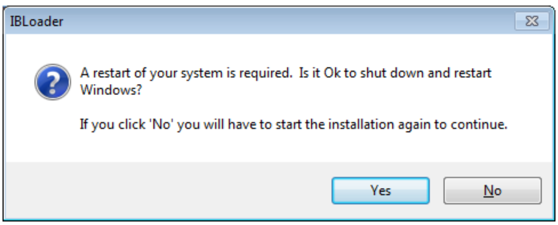
4. When the SQL Install is complete, the *IBLoader 'sa' password* dialog box is displayed one more time as shown in Figure 1-5.

FIGURE 1-5. IBLoader - 'sa' password dialog box



5. This provides a second chance to record the SQL 'sa' password. YOU WILL NEED THIS AGAIN, so make sure you keep it safe. Click OK. The *IBLoader - Restart Windows* dialog box is displayed as shown in Figure 1-6.

FIGURE 1-6. IBLoader - Restart Windows dialog box



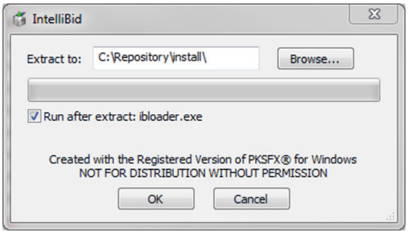
6. The Full Install requires a reboot. Click Yes. The pc will reboot. When the installation resumes, it will launch IBSETUP. This installs Crystal Reports, MadCap Help files and IntelliBid. Go to "Install Application Software" on page 1-12.

Full Install - Downloaded File

Installing **ConEst IntelliBid** checks for and installs *Windows Installer* and *Powershell* if either product is not present on your computer. If prompted to reboot, it is important to do so. The installation will restart at the next step.

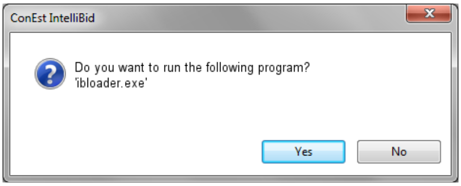
1. Double-click **IB_Full.exe**. This will display the *IntelliBid - Extract to* dialog box, as shown in Figure 1-7.

FIGURE 1-7. IntelliBid - Extract to dialog box



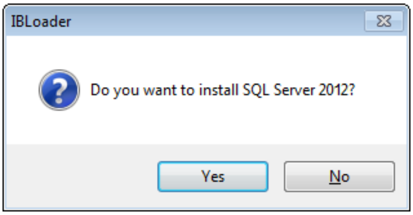
2. Click the Browse... button and navigate to the location to extract the file to.
3. To run the ibloader.exe after extract, click the Run after extract check box and click OK.
4. After the extraction has completed, the *IntelliBid - IBloader* dialog box is displayed as shown in Figure 1-8. Click OK.

FIGURE 1-8. IntelliBid - ibloader.exe dialog box



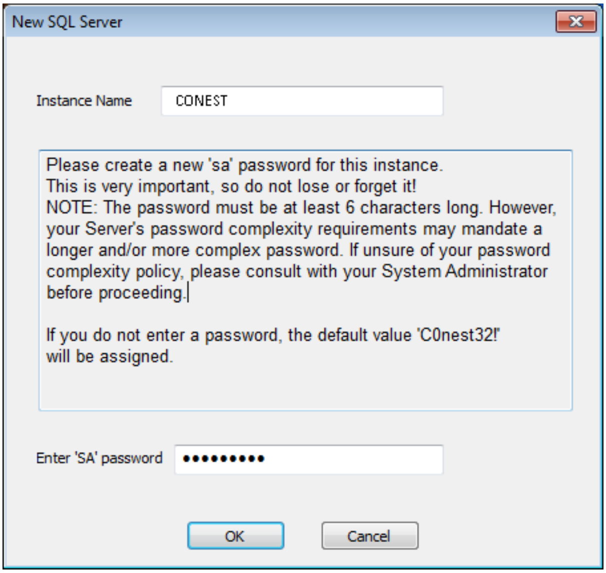
5. The *IBLoader* dialog box displays when SQL Server is not installed on your computer as shown in Figure 1-9.

FIGURE 1-9. IBLoader dialog box



6. If you need to install SQL Server, click Yes. This will display the *New SQL Server* dialog box as shown in Figure 1-10.

FIGURE 1-10. New SQL Server dialog box



Note: This is the 'sa' (system administrator) password. The password will be displayed one more time before the installation is complete. This password is important. Write it down and keep it somewhere safe. You WILL need it later.

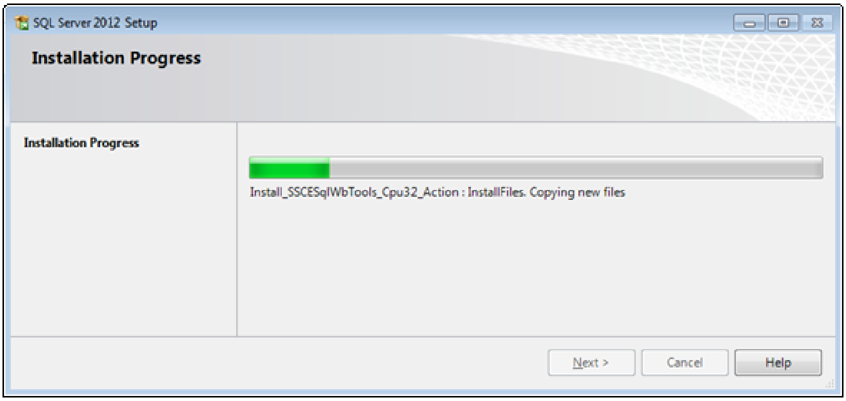
7. The SQL Install displays a series of SQL-related dialog boxes while installing SQL. No user input is required. The *SQL Server Setup* dialog box remains open during the installation as shown in Figure 1-4.

Client Install

Installing **ConEst IntelliBid** checks for and installs *Windows Installer* and *Powershell* if either product is not present on your computer. If prompted to reboot, it is important to do so. The installation will restart at the next step.

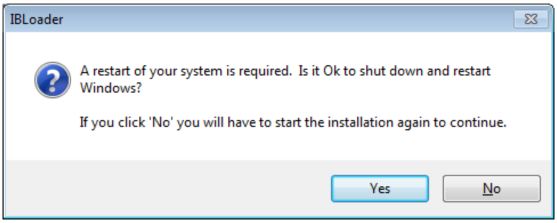
1. When SQL Server is **not** installed on your systems, the *SQL Server Setup* dialog box is displayed as shown in Figure 1-11. The Client Install displays a series of SQL-related dialogs while installing the SQL Client Tools. No user input is required. The *SQL Server Setup* dialog box remains open during the installation.

FIGURE 1-11. SQL Server Setup dialog box



2. When the SQL Install is complete, the *IBLoader - Restart Windows* dialog box is displayed as shown in Figure 1-12.

FIGURE 1-12. IBLoader - Restart Windows dialog box

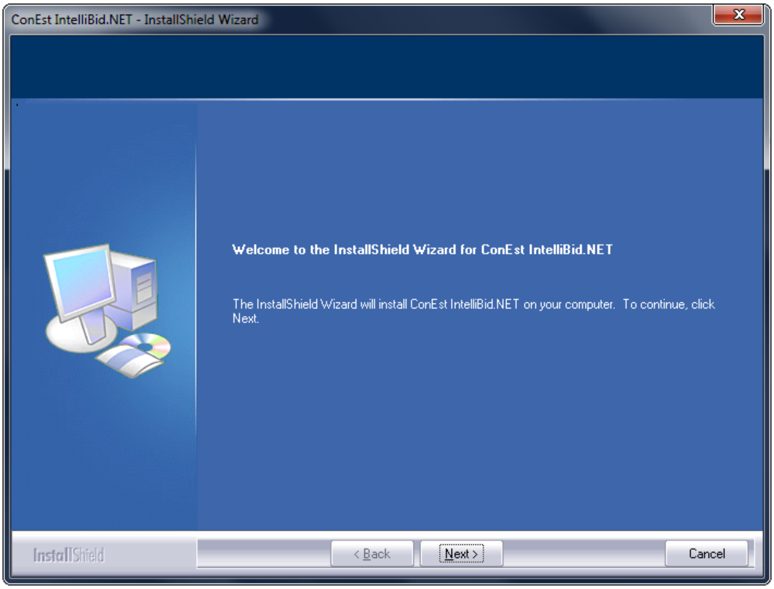


3. The Client Install requires a reboot. Click Yes. The PC will reboot. When the installation resumes, it will launch IBSETUP. This installs Crystal Reports, MadCap Help files and IntelliBid. You are now ready to install IntelliBid software.

Install Application Software

1. The software install will launch automatically and display the *IntelliBid.Net - InstallShield Wizard* dialog box as shown in Figure 1-13.

FIGURE 1-13. IntelliBid.Net - InstallShield Wizard dialog box

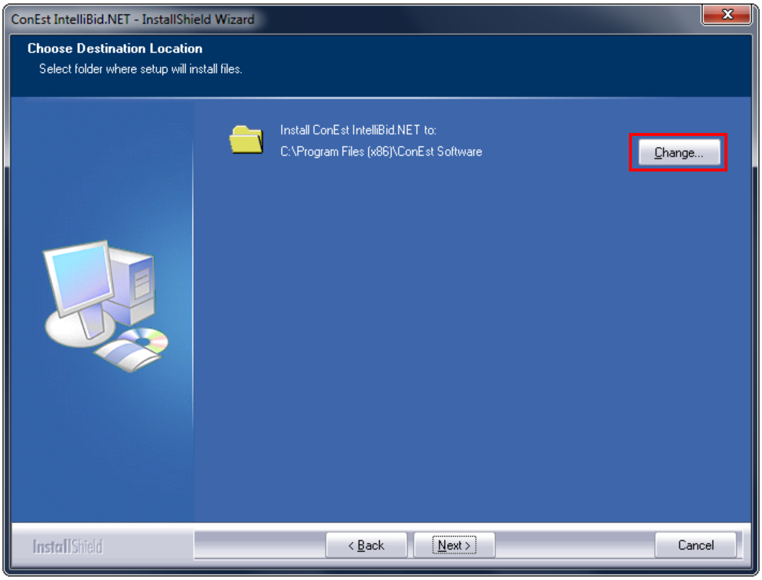


2. When you are ready, click Next.

3. Review the Software Agreement. Click the radio button to accept the terms of the agreement and click Next.

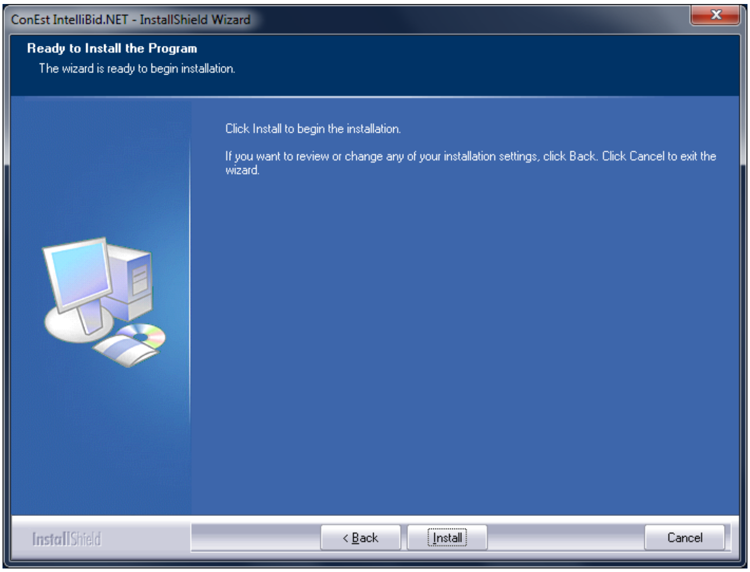
4. The Choose Destination Location dialog box is displayed as shown in Figure 1-14. Navigate to where the IntelliBid files will be installed. The default location is recommended, but you may change this to a location local to the PC only or any other destination folder by clicking the Change button and navigating to the location. The location is displayed as shown below. Once the location is determined, click Next.

FIGURE 1-14. Choose Destination Location dialog box



5. The *Ready to Install the Program* dialog box is displayed as shown in Figure 1-15. When you are ready, click Install. A progress bar charts the installation. During this process you may see messages to install Crystal Reports, Madcap Viewer (for viewing Help files) and KeyLok. Respond OK or Yes to these messages.

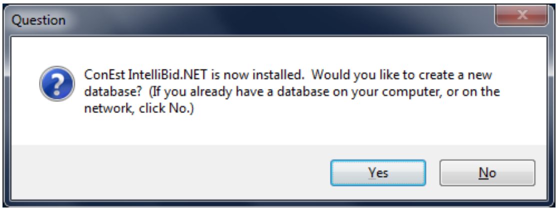
FIGURE 1-15. Ready to Install the Program dialog box



Create a New Database

6. When complete, the *Question* dialog box is displayed as shown in Figure 1-16.

FIGURE 1-16. Question dialog box



The next step is to creates a database.

Reply No when:

- You are installing a network version for multiple users. Skip this step on each user install and use the Admin Utility to create the database later, or
- You are running a current version of **IntelliBid** and plan on continuing with that database. (The database is upgraded when you launch the software.)

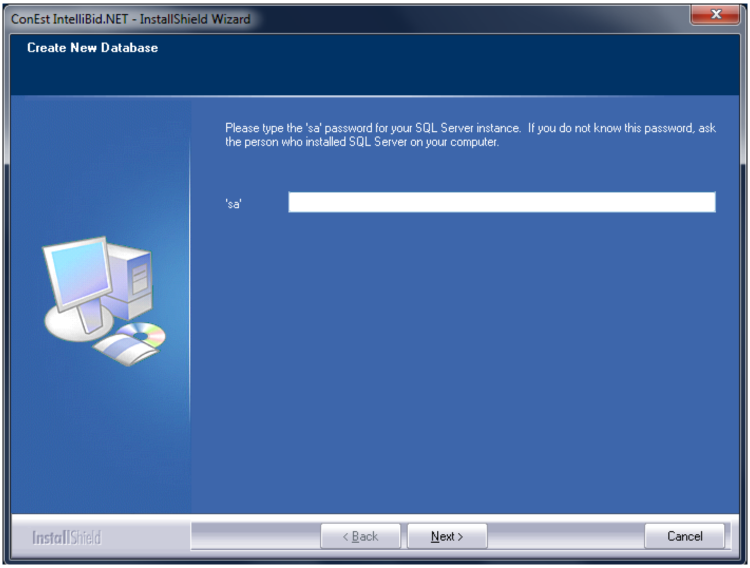
If you select No, skip to Step 22 on page 1-19.

Reply Yes when:

- This is a new install, or
- Your existing jobs will not be present in the new databases. If needed, they can be imported later.

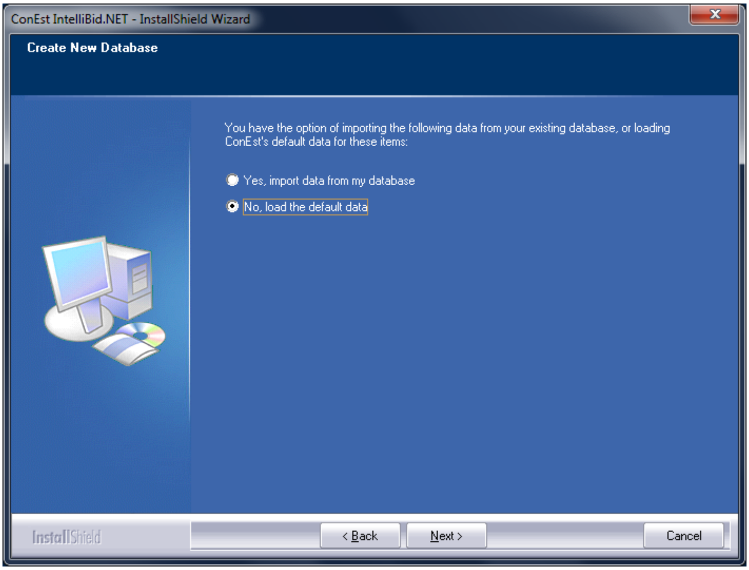
When you click Yes, the *Create New Database* dialog box is displayed as shown in Figure 1-17.

FIGURE 1-17. Create New Database dialog box



7. Enter the **'sa'** (system administrator) password. If you installed the SQL Server above, use the password you entered. If SQL was previously installed on your system, contact your system manager for the password. Click Next. The *Import Data - No, Load Default Data* dialog box is displayed as shown in Figure 1-18.

FIGURE 1-18. Import Data - No, Load Default Data dialog box



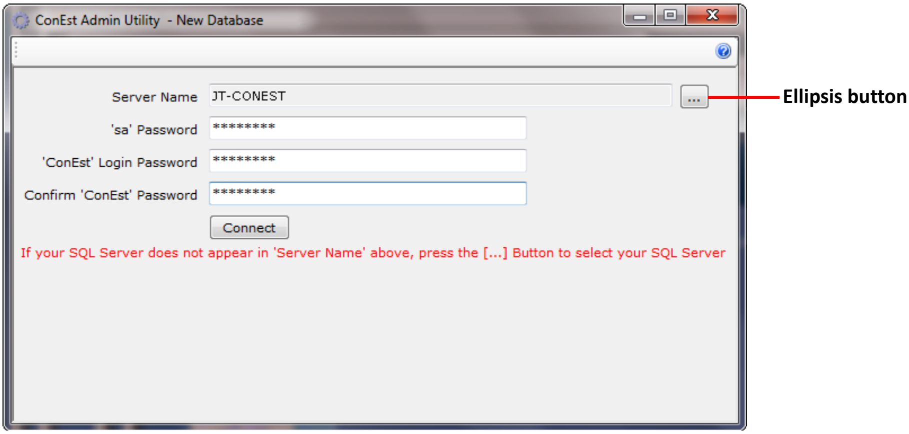
- **Yes, import data from my database** — Uses the content of version 6 IntelliBid Item database for the content of Items and assemblies in the SQL database. The new SQL database will **not include** the extensive additions and changes made to the latest IntelliBid Item database. If you want to continue with the Items exactly as they are in version 6, use this option.
- **No, load the default data** — Creates a new Item database. The latest version has been extensively updated with new items and assemblies. There is an import function in Item Maintenance to import items from your version 6 Item database, so you will be able to take advantage of the updates made to the IntelliBid database and retrieve work you have done in v6.

Note: If you have legacy ConEst products installed, either choice copies company, contact, quote vendor and resource information to the new database. **It does not copy job data**.

Note: If you plan on storing the SQL database on a network server, it will be faster if the ConEst legacy files are on the same server as the SQL database.

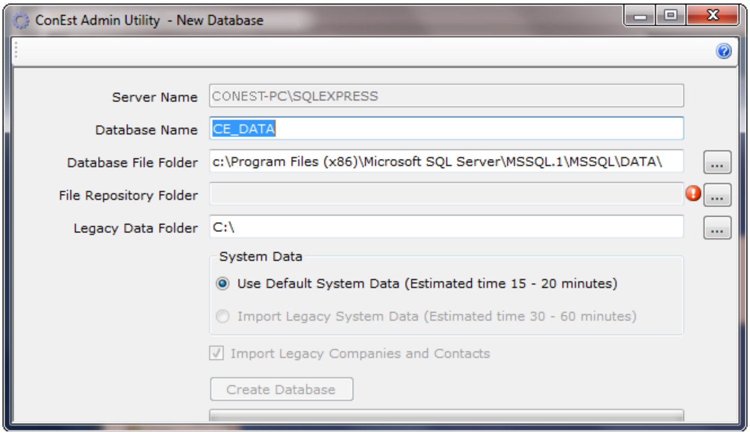
8. Select **No, load the default data** and click Next. The *New Database* dialog box is displayed as shown in Figure 1-19.

FIGURE 1-19. New Database dialog box



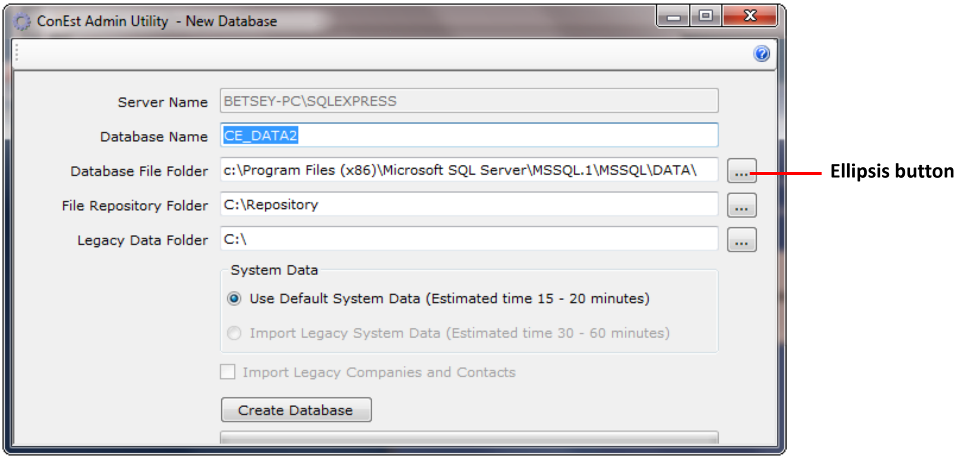
9. The SQL Server name should be displayed. If it is not, or not the correct one, click the **Ellipsis** button to display the *Browse for SQL Servers* dialog box. The dialog box lists the available SQL Servers on your network. Select the one you want to connect to and click OK.
10. The **'sa' Password** entered on the previous dialog box is used to populate the **'sa' Password** field.
11. Enter a *ConEst* password for the database. You are creating the password so **WRITE IT DOWN**. You WILL need this password later. This does not necessarily have to be the same as your 'sa' password.
12. Enter the password again to confirm the spelling.
13. Click Connect.
14. The default **Database Name** is CE_DATA. You can modify this name by typing in the **Database Name** field. Refer to Figure 1-20.

FIGURE 1-20. Database Name



15. The **Database File Folder** displays the drive location of the SQL data files on the SQL server machine. Refer to Figure 1-21.

FIGURE 1-21. Database File Folder

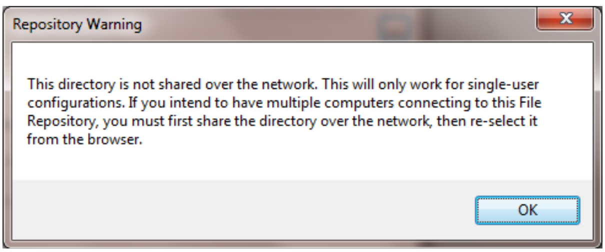


16. The **File Repository Folder** is for storing report files, Journal Messages and copies of attachments by job. Click the **Ellipsis** button and navigate to a location. You can create a New Folder there for the files. If you are sharing the database on a network, be sure to select a folder available to all potential users.

Note: Users accessing a shared Repository must have write as well as read access to this folder. Mapped drives will be resolved to a UNC path.

The *Repository Warning* dialog box displays when you select a folder on the local computer as shown in Figure 1-22.

FIGURE 1-22. Repository Warning dialog box



17. This is informational to remind you the folder is not a network folder and that if you planned on sharing the database, it may not be accessible to others. This may not be the case if you have applied the appropriate settings to the folder. Click OK to continue.

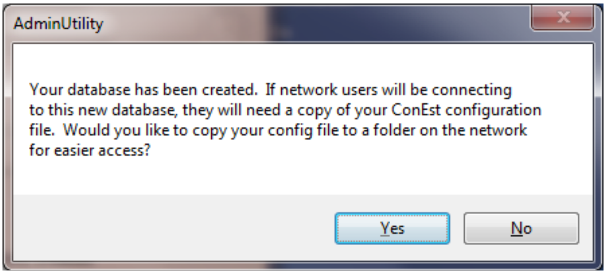
18. The **Legacy Data Folder** specifies where the legacy (version 6) **IntelliBid** and **Trac** product job files are located shown in Figure 1-21. If you will be importing data from IntelliBid or the legacy Trac products, make sure the Legacy Data Folder is set correctly.

Note: The Legacy choices are disabled when ConEst legacy products do not exist on your system as shown in the previous illustrations.

19. If you have legacy data on your system but **do not** want to include the Company and Customer records in those files, uncheck the **Import Legacy Companies and Contacts** check box. The check box will be disabled if there are no legacy files found.

20. When you are ready to start, click **Create Database**. The *Admin Utility* dialog box is displayed as shown in Figure 1-23.

FIGURE 1-23. Admin Utility dialog box

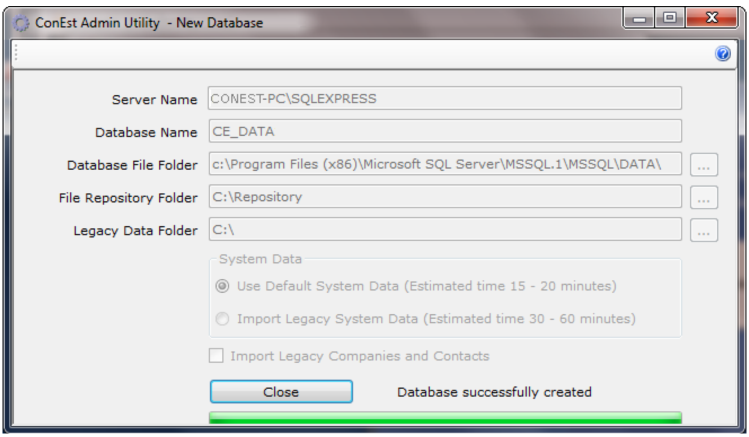


- On a reasonably fast computer, it takes about 5 minutes to create the default database. To import a legacy database, it takes about 10-15 minutes.
- If this is a network installation and you intend to allow multiple computers access to the database, each computer must have the ConEst config file on their hard drive.

21. Reply Yes to the *Admin Utility* dialog box and select a network location from the Browse window. A copy of the ConEst.config file will be placed there. As you install the software to each computer, you can use the Admin Utility to copy ConEst.config to each computer running the application (see “Connect Users to a Network Database” on page 1-23).

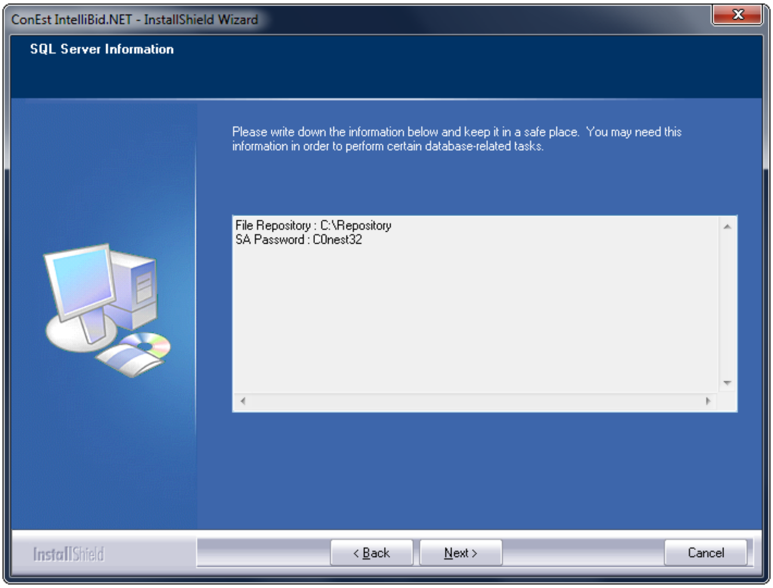
- If you are installing a single user version, click No.
- The *New Database - Database successfully created* dialog box is displayed as shown in Figure 1-24, affirming the database install was successful.

FIGURE 1-24. Database successfully created



22. Click Close. The *InstallShield Wizard* dialog box displays the location of the Repository File and the 'sa' password as shown in Figure 1-25. **Be sure you have the password recorded for future use.**

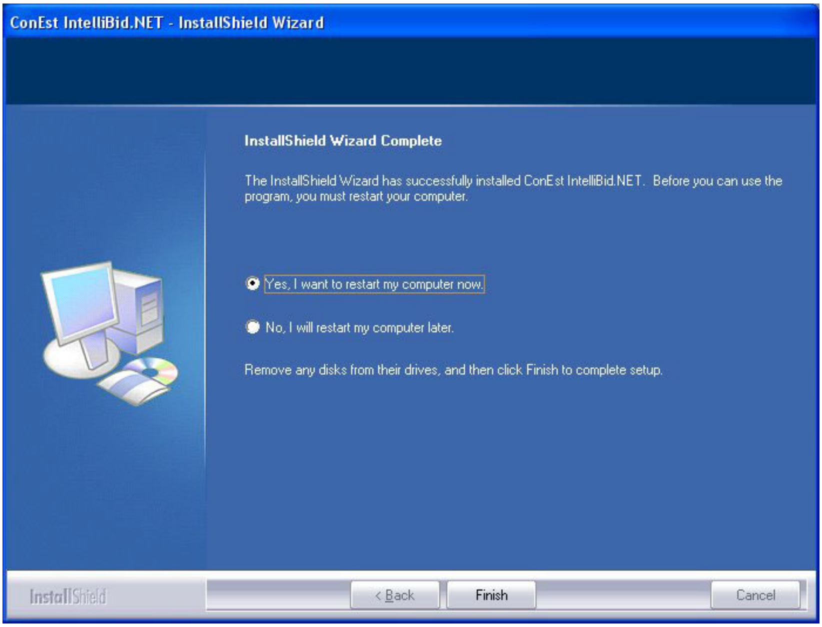
FIGURE 1-25. InstallShield Wizard



23. Click Next.

24. The *InstallShield Wizard* dialog box shown in Figure 1-26 asks to restart your computer. Select the radio button Yes, to ensure you do so before launching **IntelliBid**.

FIGURE 1-26. Restart my computer?



25. Click Finish to close the window and complete the Install. That completes the software install.

Following Up Steps

- If you have not created the SQL database yet, follow the instructions in “Create a Database” on page 1-21.
- If you are setting up a network version, each computer that will be accessing the database needs the config file stored on their computer. Follow the instructions in “Connect Users to a Network Database” on page 1-23.
- License the software:
    - If a USB key is included in your software package, follow the instructions in “Install a USB Key” on page 1-25.
    - If you are a current customer with an in-service single USB license key, you don’t have to do anything; your key will allow you to run this version of **IntelliBid**.
    - If you are a current customer and have an expired USB key (Local only), or key without IntelliBid enabled, follow the instructions in “Key Resets” on page 1-25.
    - If none of the above apply, follow the instructions in “Server License” on page 1-25.
- The final step for the Administrator is to set up the your company and contact information and the User IDs and accounts for employees running IntelliBid. See “Administration Setup” on page 1-28.

Create a Database

If you are installing the network version, you may have skipped the Create Database portion in the install earlier. Before you can license the software, you need to create the database. The Admin Utility has a function to create a new database.

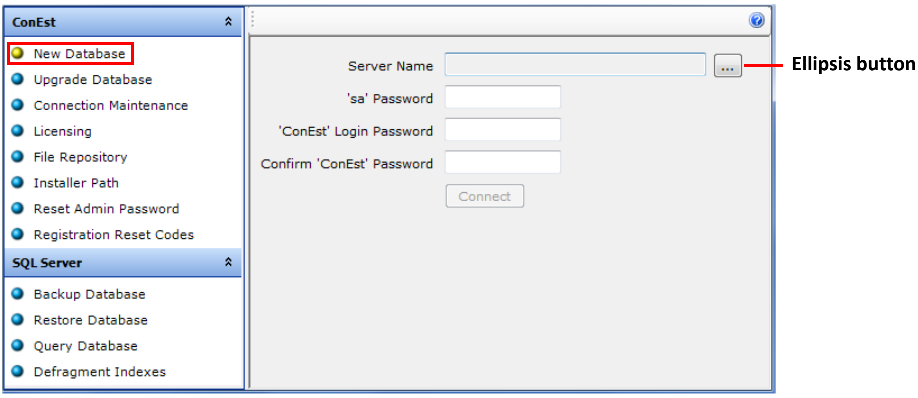
1. Click Windows Start > All Programs > ConEst Software >Admin Utility OR double-click the *Admin Utility* icon, as shown in Figure 1-27.

Note: The Admin Utility icon is not created on the desktop during the install.

FIGURE 1-27. Admin Utility icon

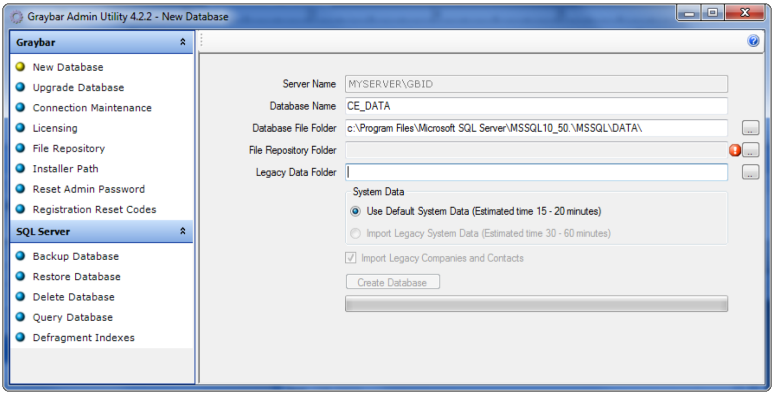
2. The *Admin Utility* window is displayed as shown in Figure 1-28. Select **New Database**.

FIGURE 1-28. Admin Utility window



3. Select the **Server Name** using the **Ellipsis** button. Admin Utility scans the network and lists any SQL Servers it locates. Click on the server name and click OK to return to the *Admin Utility* window.
4. Enter the **'sa' Password**.
5. Enter a **'ConEst' Login Password** for the database. Re-type the password to confirm the spelling and ensure you have it recorded for future reference.
6. Click Connect.
7. The **Database Name** defaults to CE_DATA as shown in Figure 1-29. If this name is in use, a number will be appended. You may change the name.

FIGURE 1-29. Admin Utility - Database name window

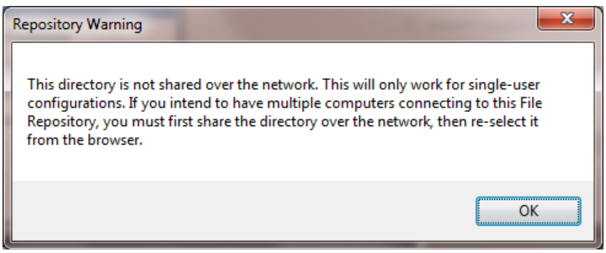


8. The default locations for program and job-related files are displayed in the next 3 fields. You may change any of the directories by clicking the **Ellipsis** button to open a browse window to navigate to the desired folders.

   - **Database File Folder** — The default location for the SQL **Database file** is the C:\Program Files\Microsoft SQL Server\MSSQL10_50.CONEST\MSSQL\DATA\ folder on the current computer. (The *Locate Folder* dialog box displays the folders on the SQL Server, which is not necessarily the computer you are running Admin Utility.)
   - **File Repository Folder** — Created for report files, Journal Messages and copies of attachments. Typically, the file Repository for a single-license user would be stored in a folder as C:\Repository. You can rename the folder. Click the **Ellipsis** button and navigate to the location or create a new folder. When this is a multi-license version, select a network folder available to all users. When a mapped drive is selected, it will be resolved to a UNC path.

Note: When you select a local directory, the Repository Warning dialog box is displayed as shown in Figure 1-30 informing you the directory is not shared over the network.

FIGURE 1-30. Repository Warning dialog box



   - **Legacy Data Folder** — Is set to the default location for IntelliBid v6 and the Trac products. If your databases are in a different location, ensure the Legacy Data Folder is set correctly.
   - **System Data** — What is loaded into your new database. When you have **ConEst** products installed, either method will retrieve company, contact, quote vendors and resource information. When you do not have ConEst products, the Legacy choice will be disabled (as shown in previous dialog boxes).

- **Use Default System Data** (recommended) — Select to take advantage of the new Item database. There is an Item import function to retrieve any custom items you have in existing current IntelliBid databases. Item Maintenance has a function to import items from a legacy database so you will be able to retrieve work you have done in the v6 Item database for the .Net version of **IntelliBid**.

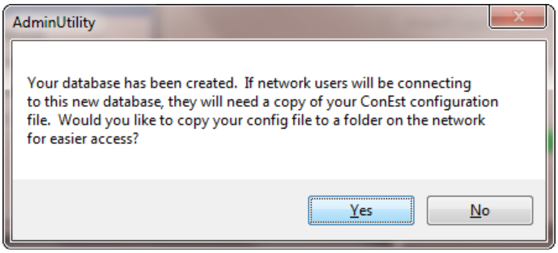
- **Import Legacy System Data** — When you wish to retain the Item database from v6, use this option. You will **not** get the latest Item database from ConEst.

Note: Elapsed time for the import varies depending on the amount of data in the database files and the speed of your computers. Allow approximately 5 minutes on i5 or i7 processors with 8 GB RAM (minimum) to create the default database and 10 to 15 minutes for the legacy data import.

9. **IntelliBid** will import company and contact records from the legacy JobTrac, T&M Billing Manager and BidTrac databases. If you do not want to import these records, uncheck the **Import Legacy Companies and Contacts**.

10. Click Create Database. The *Admin Utility* dialog box is displayed informing you the database has been successfully completed as shown in Figure 1-31.

FIGURE 1-31. Admin Utility - database created



Connect Users to a Network Database

When the database is located on a central server, each computer running the application needs a copy of the config file on its local drive. When the config file is missing or config file information has changed, such as the Admin password, this message will display on launching **IntelliBid**.

- During the Installation you had the option to create a database. When you have not done that yet, follow the steps in "Create a Database" on page 1-21.

- If the database exists, this computer may not have the config file in place. When the database is created, you have the option to copy the config file to a network location; one that would be accessible to all computers running IntelliBid. If you did that and remember where the file is located, you can connect each user from the Login dialog box in "I Know Where I put the Config File" on page 1-24.

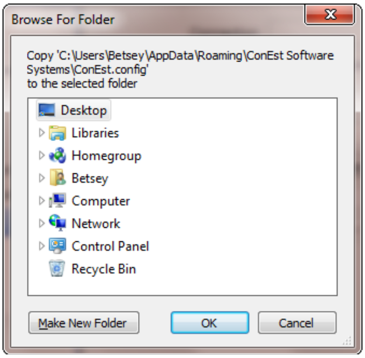
- If you did not copy the Config file or don't remember where it is, continue with the following section.

I Have a Database but I Don't Know if I Have a Config File or Where it is Located

1. On the computer that created the database, launch the ConEst Admin Utility (Windows Start > All Programs > ConEst Software > Admin Utility).

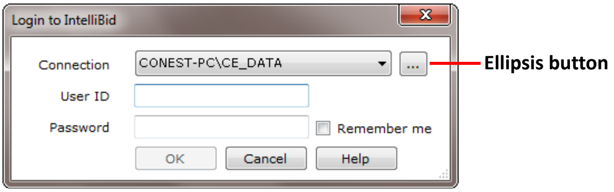
2. Select **Connection Maintenance** from the Navigation bar (menu list on the left).
3. Click Copy Config button. The *Browse For Folder* dialog box is displayed as shown in Figure 1-32.

FIGURE 1-32. Browse For Folder dialog box



4. Select a location accessible to the other computers running **IntelliBid** and click OK. This places a copy of the config file in the selected folder.
5. Close **Admin Utility**.
6. On each user's computer, launch **IntelliBid**. The *Login to IntelliBid* dialog box is displayed as shown in Figure 1-33.

FIGURE 1-33. Login to IntelliBid



7. Click the Ellipsis button. Navigate to the location where you stored the config file and open it. This copies the ConEst.config file to the user's computer.
8. Enter the **User ID** and **Password** and click OK. You will now be connected and logged into **IntelliBid**.

I Know Where I put the Config File

1. On the *Login to IntelliBid* dialog box, click the **Ellipsis** button.
2. Navigate to the folder where ConEst.config was copied. Select it, right-click and select **Open**. This copies the ConEst.config file to this computer's hard drive.
3. You should now be able to log into IntelliBid.

Note: You only have to do this once. The next time the user launches IntelliBid, the Server and Database name will be displayed and the user connected to the database.

Licensing the Software

After the software is installed either:

- Install the USB key **OR**
- Activate the software license using the Admin Utility.

Install a USB Key

If a key was included with your software package from ConEst, you can plug the key in now. The key needs to be plugged into a USB port on the computer that will be running **IntelliBid**.

1. Insert the USB key in the USB port on your computer.

CAUTION: **The key can only be installed one way. DO NOT FORCE THE KEY IN THE USB PORT. Your computer's Found New Hardware wizard will launch automatically.**

2. Click Next. The Install Wizard will complete the installation automatically.

3. Click Finish. If you are prompted, reboot the computer when the installation is finished.

4. The last step is to perform the "Administration Setup" on page 1-28.

Key Resets

If you are using a USB key for licensing you will need to reset the key. For security purposes, **IntelliBid** is shipped with a product registration expiration date set 30 days from the date of purchase. Warning messages will display starting 10 days prior to this expiration date. When you see this message, you need to reset the Registration codes for the USB key. The new expiration date will be set depending on your account status.

The following reasons explain why you may need to reset the codes:

- It has been 30 days since you purchased **IntelliBid**
- The payment schedule you elected requires a renewal code periodically, or for security purposes, you have chosen to reset codes annually
- Your trial version comes with a 30 day expiration
- Upgrades will sometimes require a reset code

If the registration has expired, you will not be able to run **IntelliBid**. When it is convenient during the 30-day period, either call Technical Support at 800 662-7687 ext 2 or use the Reset Key function in the Admin Utility. See "Registration Reset Codes" on page 2-12.

Note: You will need the key number displayed on the message (or on the key itself) when you call Technical Support or use the web-based utility.

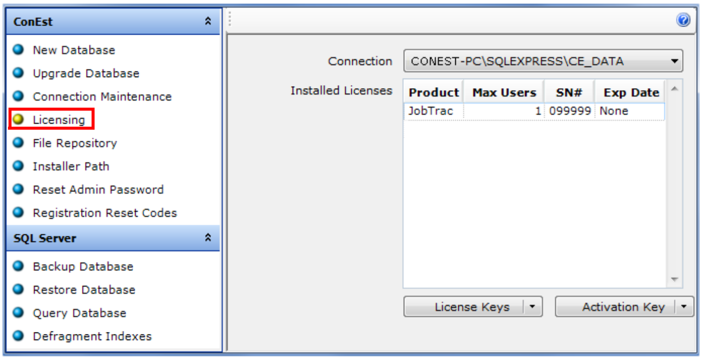
Server License

Note: If you have a valid single license ConEst USB key, you do not need to perform this step. If you have a network key for the pre-SQL version of IntelliBid you need to perform the following steps to set up the server license.

If you are running a network version or a single version but not with a USB key, you need to activate the server license. You have 30 days from the time of installation to license the software. This is performed using the Admin Utility with the License Key number included with your software package. It only takes a few minutes, but you will need to contact ConEst Technical Support. Please plan this during EST normal business hours.

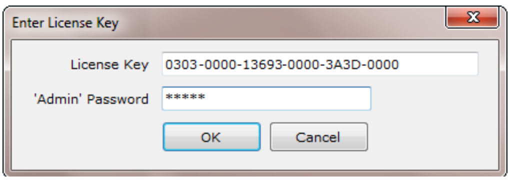
1. Open the Admin Utility. Click on the Windows **Start** button and then All Programs > ConEst Software > Admin Utility. This displays the *Admin Utility* window as shown in Figure 1-34.

FIGURE 1-34. Admin Utility window



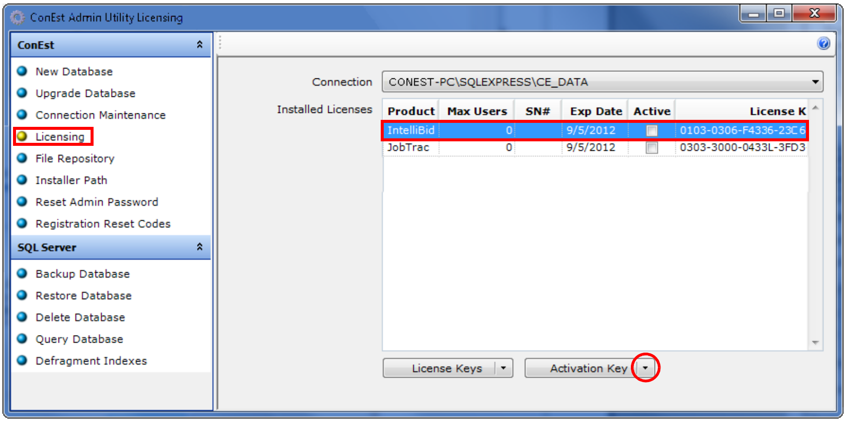
2. On the Sidebar menu, select **Licensing**.
3. Click the License Key drop-down and select Enter a License Key. The Enter License Key dialog box is displayed as shown in Figure 1-35.

FIGURE 1-35. Enter License Key dialog box



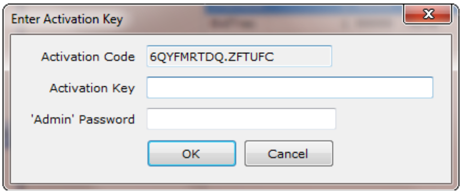
4. Enter the License Key number included with your software package and the Admin password. Click OK.
5. On the *Admin Utility - Licensing* window, select the row **IntelliBid** as shown in Figure 1-36.

FIGURE 1-36. Admin Utility - Licensing window



6. Click **Activation Key** drop-down arrow and select **Manual Activation**. The *Enter Activation Key* dialog box is displayed as shown in Figure 1-37.

FIGURE 1-37. Enter Activation Key dialog box



7. Contact Technical Support either by calling **603 437-9353 x2** or email **support@conest.com**. Please include your company name, contact information, License Key Number and Activation Code. A ConEst technician will supply the **Activation Key** code to enter into the field provided here.

8. Enter your Administrator password and click OK. Product, max number of users, serial number and expiration information is displayed. Licensing is complete.

9. Close Admin Utility.

Administration Setup

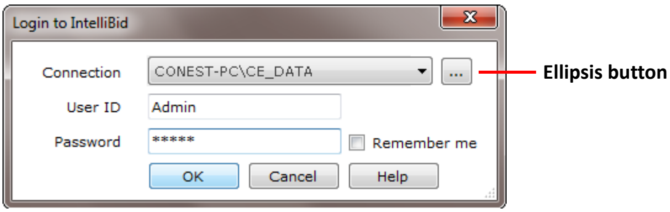
The last step is performed by the Administrator. At this point the software is installed, the database created and connected and the licensing complete. The Administrator logs into **IntelliBid** to set up User accounts for everyone who will using the software. The option to run a setup Wizard launches with the first login. It prompts for the required information to get started. If you choose not to use the Wizard, open the Help topic Administrator Setup under Getting Started for the steps you need to complete.

1. Double-click the ConEst IntelliBid icon as shown in Figure 1-38.

FIGURE 1-38. ConEst IntelliBid.NET icon

2. The *Login to IntelliBid* dialog box is displayed as shown in Figure 1-39. The Server and the database you created should appear in the dialog box. If not, use the drop-down list to select the database you need. If the database is not in the drop-down list, use the **Ellipsis** button to launch a file Explorer and locate a config file.

FIGURE 1-39. Login to IntelliBid dialog box

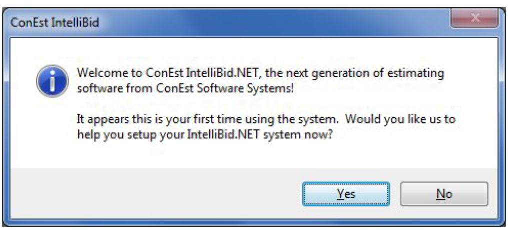


3. Enter **Admin** for the **User ID** and **Password**. Click OK.

Note: The Admin user is limited to maintaining User IDs, passwords, Email setup and company data. The Admin user cannot perform takeoff or any functions related to a job.

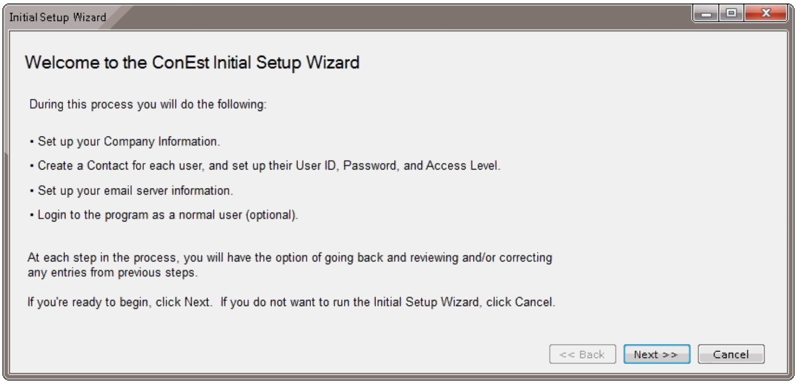
4. The ConEst IntelliBid - Setup dialog box is displayed as shown in Figure 1-40. It recognizes this is the first time you're launching the software and provides the option of performing the setup using the Wizard.

FIGURE 1-40. ConEst IntelliBid - Setup dialog box



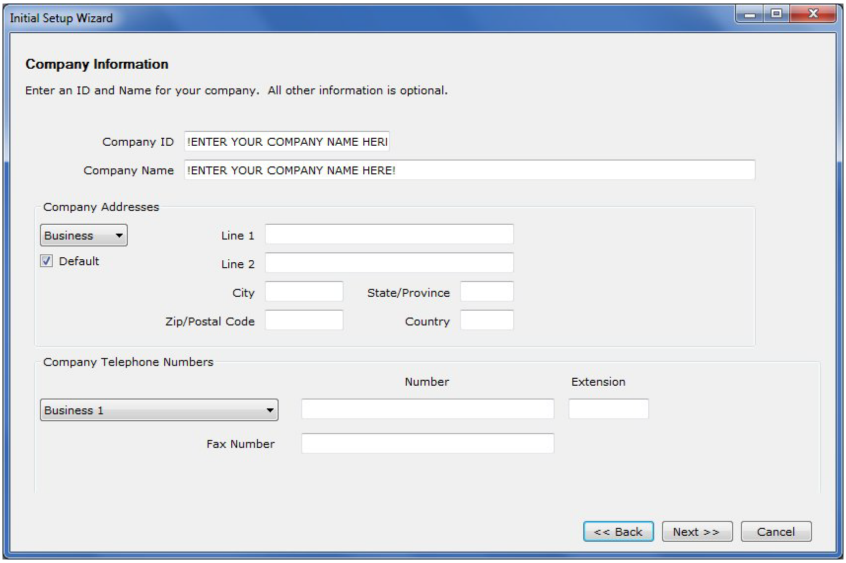
5. Click Yes to continue. The *Initial Setup Wizard* dialog box is displayed as shown in Figure 1-41.

FIGURE 1-41. Initial Setup Wizard dialog box



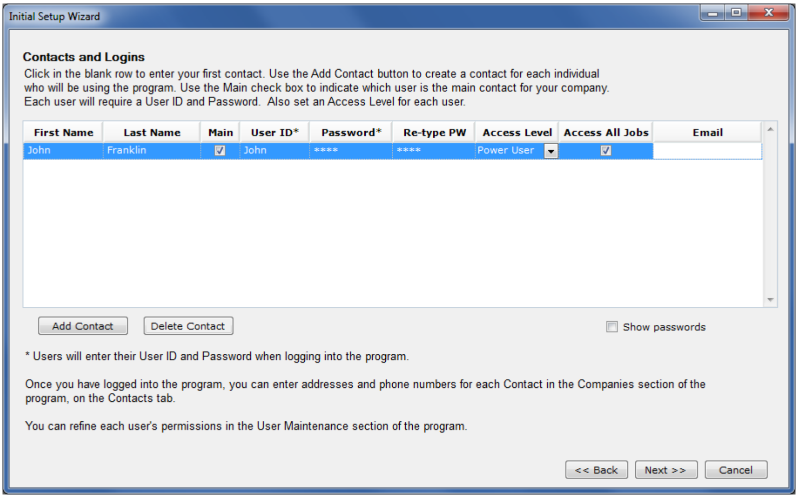
6. This dialog box lists the processes you will be performing in the Wizard. Click Next. The *Company Information* dialog box is displayed as shown in Figure 1-42.

FIGURE 1-42. Initial Setup Wizard - Company Information dialog box



7. If IntelliBid found ConEst legacy databases, company data will be displayed, otherwise it will appear as shown above. Enter an ID and the full name of your company. Enter Address and phone information. This information can be modified later in **IntelliBid**. Click Next. The *Contacts and Logins* dialog box is displayed as shown in Figure 1-43.

FIGURE 1-43. Initial Setup Wizard - Contacts and Logins dialog box



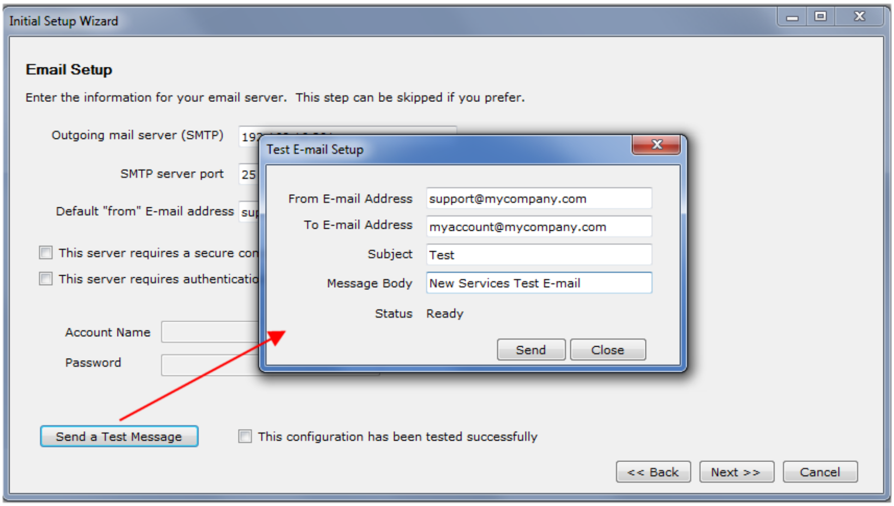
8. Follow the instructions by entering your first contact (i.e. user). Additional contacts can be entered by clicking Add Contact. If you're assigning accounts for multiple users, ConEst recommends you add your Admin contact now. ConEst recommends that the Administrator create a separate User account as a **Power User** (select under Access Level) which will provide access to all jobs.

Note: The Administrator is limited in what they can see and do.

This dialog box is an easy entry method for adding additional people who will be using IntelliBid. You can add them as contacts for your company. Set their Access Level to **No Access**.

9. Click Next. The *Email Setup* dialog box is displayed as shown in Figure 1-44.

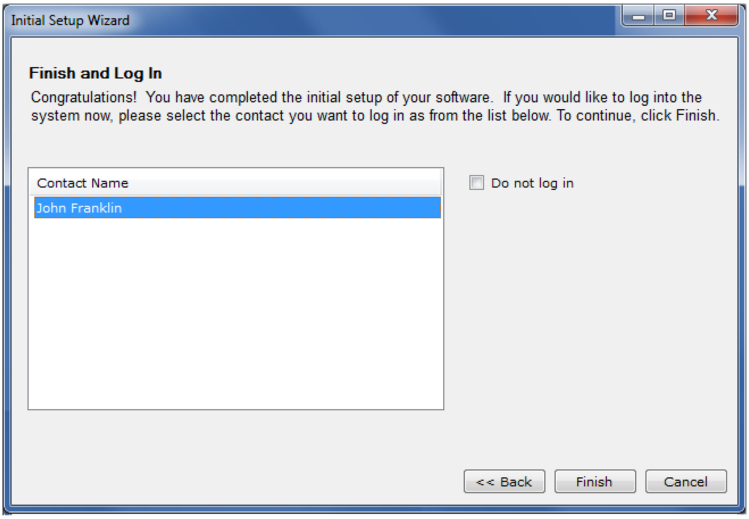
FIGURE 1-44. Initial Setup Wizard - Email Setup dialog box



10. Take advantage of the automatic log in for yourself (Admin). You can then go to Maintenance > User Access. This area gives you considerably more flexibility in assigning Access rights to each user. It also has a function to email User IDs and passwords to each user.

11. Email Setup information is necessary for sending email from IntelliBid. Enter the appropriate server information for your site. Test the Email setup by clicking Send a Test Message. Fill in the fields and click Send. A message will tell you if the email was successful. Click Close to return to the *Email Setup* dialog box. Click Next on the *Email Setup* dialog box to continue. The *Finish and Log In* dialog box is displayed as shown in Figure 1-45.

FIGURE 1-45. Initial Setup Wizard - Finish and Log In dialog box



12. This dialog box lists the users you have added. Select your name from the contact list and click Finish. This will log into your account giving you access. If you want to continue entering user accounts, go to Companies/Contacts and make sure the users are all listed as contacts for your company. Go to Maintenance and User Access to assign User IDs, passwords and Access Rights.

    You are now able to access the sections that the Admin user cannot. There is more information in the Online Help system. Use the **F1** key or click the **Help**  icon on the Toolbar (top - far right) when you are running IntelliBid.

Chapter 2

Utilities and Resources

Introduction

This section reviews the functions in the Admin Utility included with IntelliBid Lesson Guide, the Online Help system and use of the **ConEst** Online Service Center.

Quick Reference

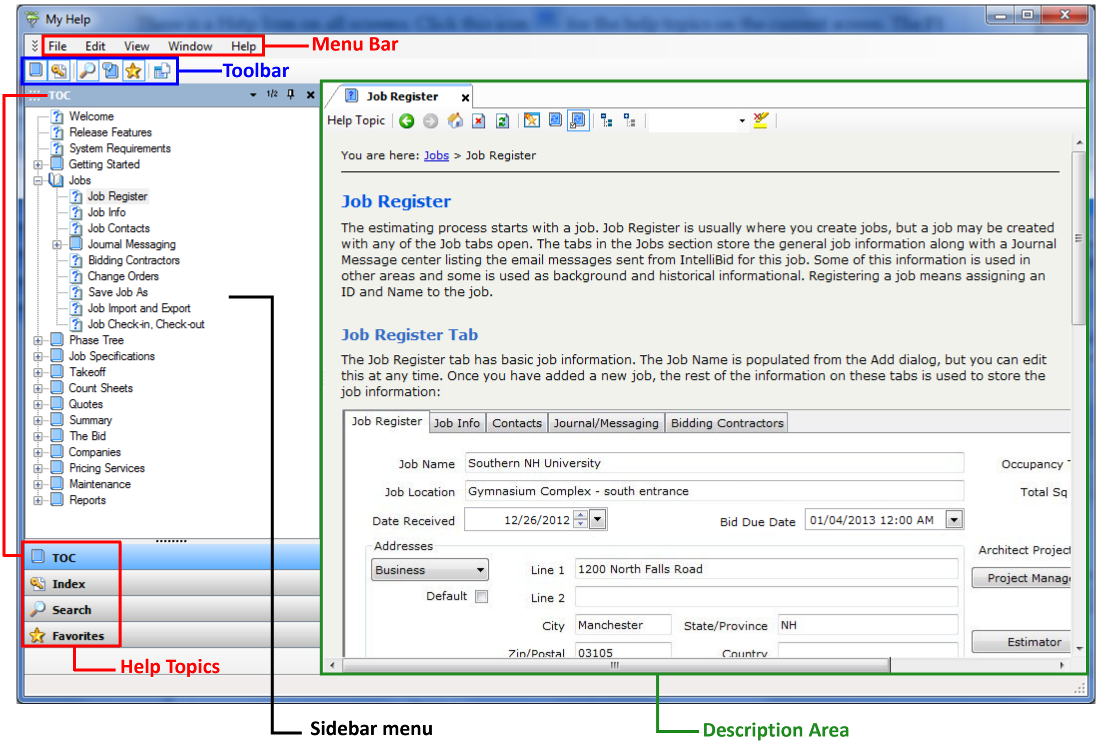
Online Help

IntelliBid comes with an Online Help system that you can use as a quick reference any time you need it. Search for information by using the table of contents, the index or by performing a word search. When you open Online Help from the menu bar, it opens to the topic based on the window that is currently open. There are three tabs in the window on the left that make searching for information easier.

Table of Contents

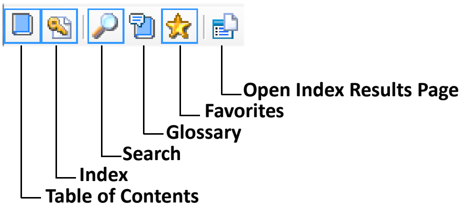
There is a Help Icon on all windows. Click the Help icon for help topics on the current window. The **F1** key also launches Help for the current window as shown in Figure 2-1.

FIGURE 2-1. Online Help window



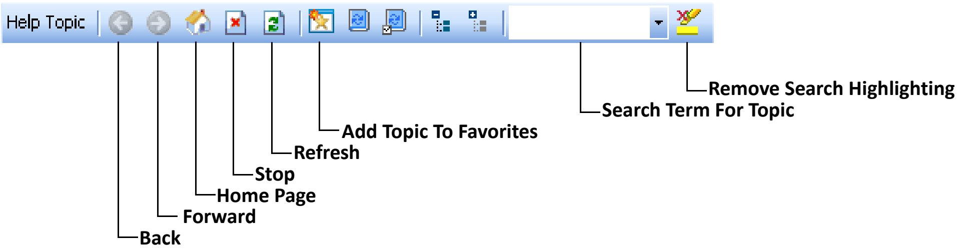
Help topic buttons are: Table of Contents, Index, Search and Favorites. When a help topic is selected, the Sidebar changes. The TOC is shown above. There are commands on the Menu Bar and Toolbar buttons below.

FIGURE 2-2. Help Toolbar



The icons above the Help Topic are controls for the topics:

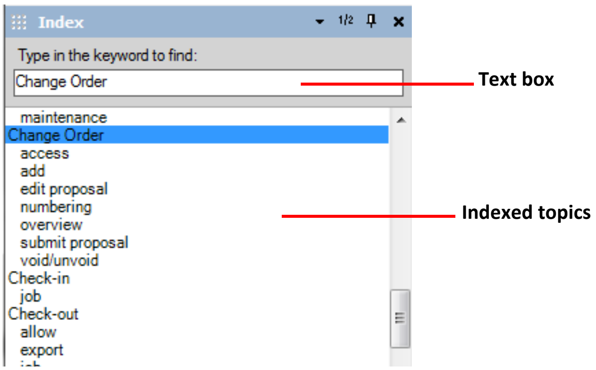
FIGURE 2-3. Help Topic Tool Bar



Index

Click the **Index** button. The Sidebar displays the Indexed topics as shown in Figure 2-4.

FIGURE 2-4. Index

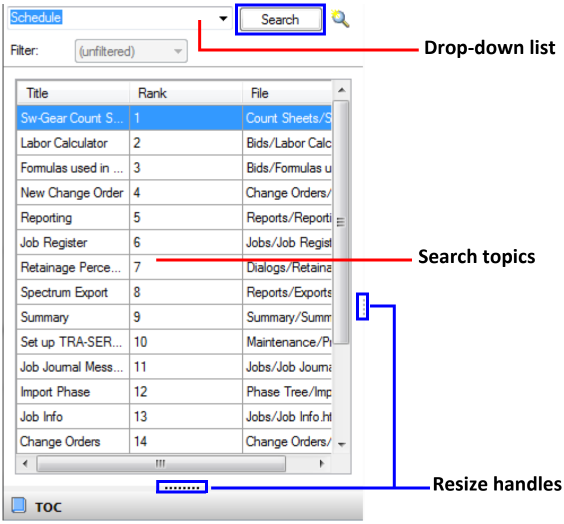


1. In the text box, type the first few letters of the topic you are looking for. The topic list scrolls down to find a match as you type.
2. Click on the topic you want to view. If there is one page for the topic, it will appear in the Description Area. If your topic can be found in multiple pages, a popup menu displays all the topic pages.
3. If you do not see the topic you need, try using the **Search** method.

Search

Click the **Search** button. The Sidebar displays the search topics as shown in Figure 2-5.

FIGURE 2-5. Search



1. Type keywords for what you are looking for into the drop-down list at the top.
2. Click **Search**. A list of search topics is shown. You can resize the Sidebar for a better display of the search topics.
3. Select a topic and the details appears in the Description Area.

Admin Utility

Admin Utility is included with the IntelliBid software install. We covered the "Create a Database" on page 1-21 and "Licensing the Software" on page 1-25. This section describes several functions for the operation of IntelliBid.

Click the **Admin Utility** icon (Figure 2-6) or use windows Start > All Programs > IntelliBid > Admin Utility.

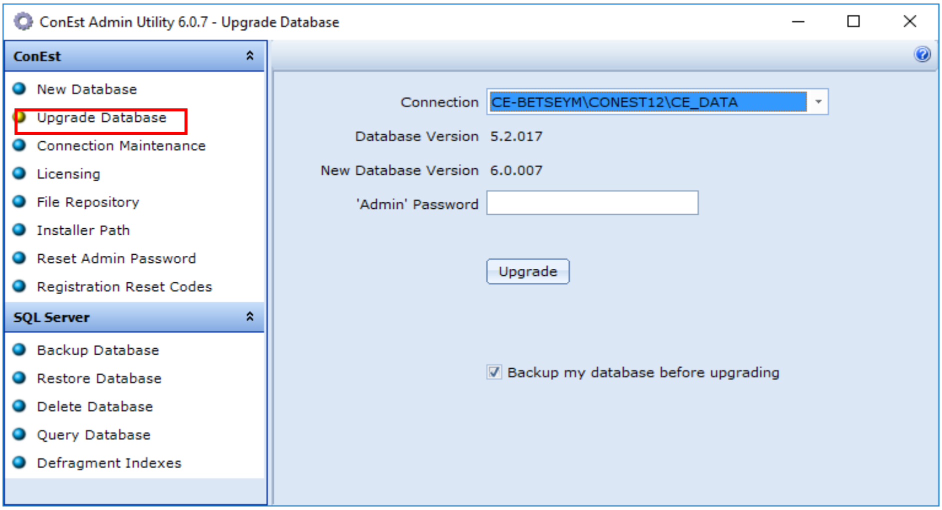
FIGURE 2-6. Admin Utility icon

Upgrade Database

The Upgrade Database option updates an existing database to the most recent version. When you first log in after a software upgrade, you will be prompted to upgrade the database. The Upgrade Database function is another way for an Administrator to update the **ConEst** database after a software upgrade. The upgrade performs a backup of the current database before upgrading it to the new version and it will prevent anyone from logging in during the upgrade.

1. Click **Upgrade Database** in the Sidebar menu as shown in Figure 2-7.

FIGURE 2-7. Upgrade Database



2. In the **Connection** drop-down list, select the server where the SQL database resides. The Database Version numbers are displayed.
3. Enter the **'Admin' Password** and click Upgrade. A progress bar displays the upgrade process starting with the backup. There will be a message to confirm the upgrade is complete.

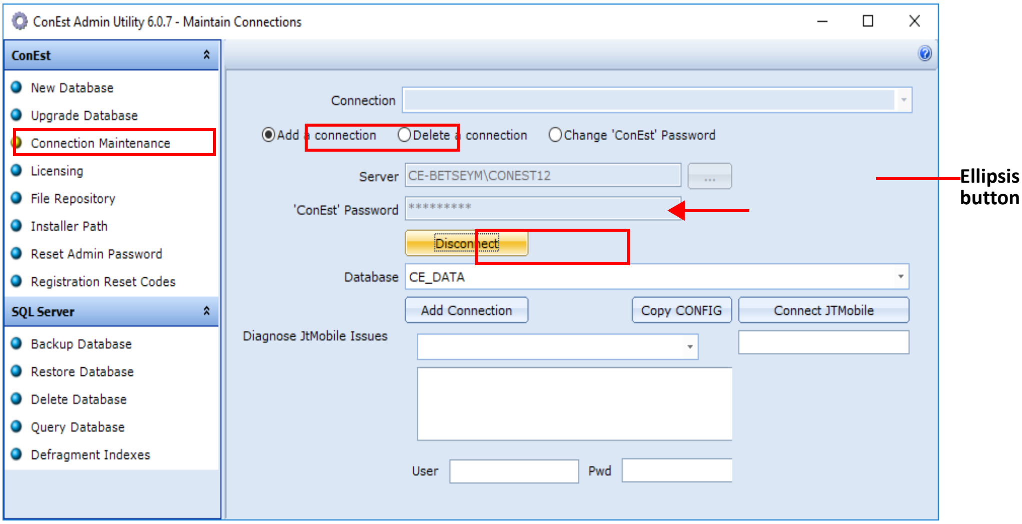
Connection Maintenance

Connection Maintenance is used to change or add connections to the database, to change the database password and to copy the config file to user's computer.

To Add a Connection

1. Click **Connection Maintenance** in the Sidebar menu as shown in Figure 2-8.

FIGURE 2-8. Maintain Connections



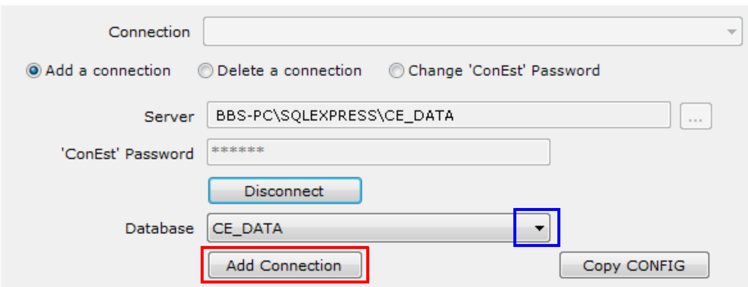
2. Select the **Add a connection** radio button.

3. Click the **Ellipsis** button and select the Server where the database resides.

4. Enter the '**ConEst' Password** and click Connect as shown in Figure 2-8.

5. Select the **Database** from the drop-down list and click Add Connection as shown in Figure 2-9. The database connection will now be available on the *Login* dialog box.

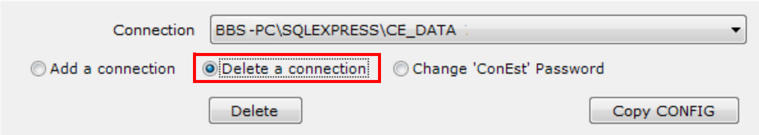
FIGURE 2-9. Select the database



To Delete a Connection

If you want to remove a connection to a database, select the Delete a connection radio button as shown in Figure 2-10.

FIGURE 2-10. Delete a connection



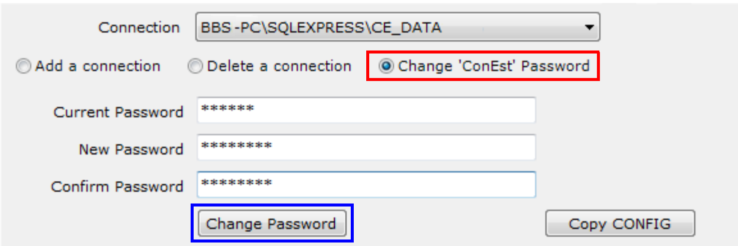
1. Use the **Connection** drop-down list to select the server where the database resides.
2. Click Delete. A message will confirm the connection has been removed.

To Change the Database Password

This function will allow you to change the password to the database.

1. Select the **Change 'ConEst' Password** radio button as shown in Figure 2-11.

FIGURE 2-11. Change 'ConEst' Password



2. Enter the current password.
3. Enter the new password.
4. Confirm the new password by entering it again.
5. Click Change Password. A message will confirm the password is changed.

Copy Config

If you are running a network version with multiple users, the config file created with the new database needs to be installed on each computer that will be accessing the ConEst database. The Copy Config button is here if you did not do this or if you neglected to write down where you stored the config file. Launch the Admin Utility on the computer that created the database and follow these steps. It will put a copy wherever you specify on your network. Then that file can be accessed from each computer.

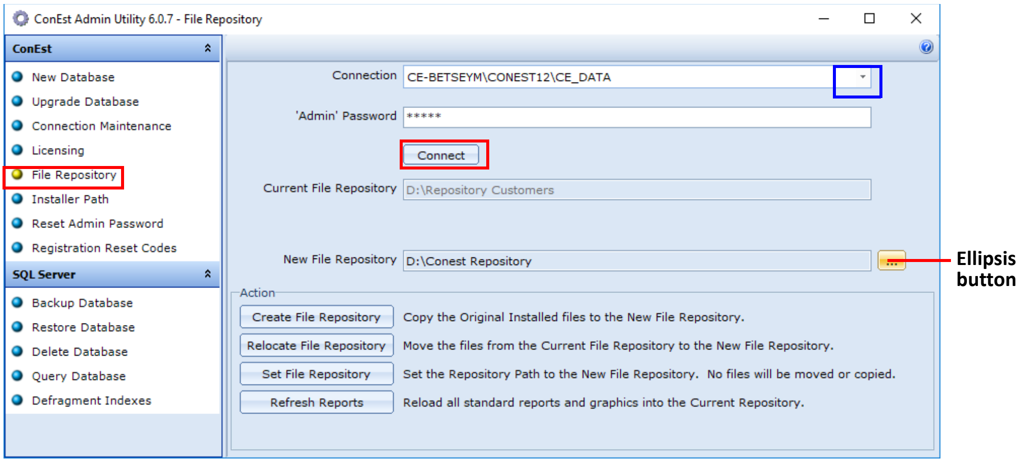
1. Click the Copy Config button. This opens a Browse window.
2. Select a folder on a shared drive that you can access from each computer and click OK. A copy of the config file will be placed in that directory.
3. Launch IntelliBid from each computer. On the login dialog box, click the Ellipsis button and navigate to the folder you selected in step 2. You should be able to log into IntelliBid from this computer now.

File Repository

File Repository is a directory location used to store common files, i.e. report files, journal messages, documents attached to the job as well as copies of email attachments and cut sheet files. Network users need to establish the File Repository on a central server and then point each IntelliBid user to the File Repository. The File Repository is stored on the user's computer for single licenses, but you can relocate it to a central server using this function.

1. Select **File Repository** from the Sidebar menu as shown in Figure 2-12.

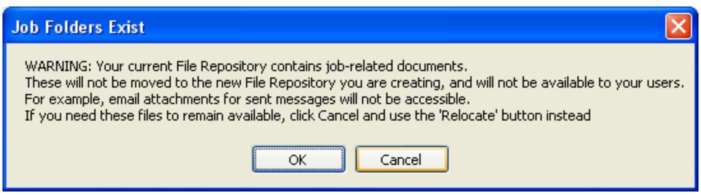
FIGURE 2-12. File Repository



2. From the **Connection** drop-down list, select the server and database you want to connect to.
3. Enter the Administrator password for the database and click Connect. If the password is correct for this file, the Admin Utility will be connected and will display the path for the File Repository currently assigned.
4. If you are creating a new File Repository:
   - **a.** Click the **Ellipsis** button next to the New File Repository field and navigate to the location you want to place the File Repository.
   - **b.** Click **Create File Repository**.

   When the Admin Utility finds a current File Repository with job folders and files, the *Job Folders Exist* dialog box is displayed as shown in Figure 2-13.

FIGURE 2-13. Job Folders Exist dialog box



Any files associated with your jobs in the current File Repository will no longer be available when you create a new repository. If that is what you intend, click OK and the File Repository will be created and this computer pointed to that location. If that's not what you intended, you probably want to relocate your File Repository.

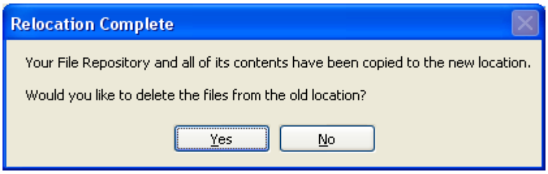
When the repository has been created, you will see a confirmation message.

5. If you want to move the current File Repository to a new location, perform the following: See Figure 2-12.

a. Next to **New File Repository**, click the **Ellipsis** button and navigate to the location you want to relocate the File Repository.

b. Click **Relocate File Repository**. This moves all files in the current File Repository to the new one. When the move is finished, the *Relocation Complete* dialog box is displayed as shown in Figure 2-14.

FIGURE 2-14. Relocation Complete dialog box



c. If you want the old Repository deleted, click Yes. The Relocation is complete.

6. **Set File Repository** — Used in a network environment. First create the File Repository and then point each user's computer to access the Repository on a central server. See Figure 2-12.

a. Next to **New File Repository**, click the **Ellipsis** button and navigate to the File Repository on the network.

b. Click **Set File Repository**. When the process is complete, the fields will be cleared and the buttons disabled.

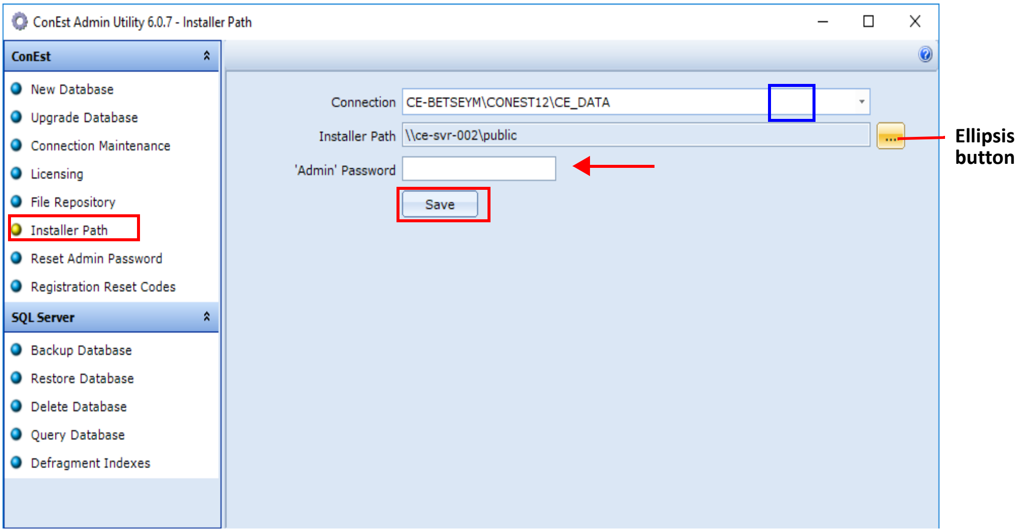
Installer Path

The Installer Path function allows the Administrator to establish a central network location to store ConEst software upgrades. When upgrades are available, the files can be downloaded to this location. As users log in, if the database has been upgraded to a new version, the user is notified that an upgrade is available and prompts them to run it.

Specify the path for IntelliBid to check on launch:

1. Select **Installer Path** from the Sidebar menu as shown in Figure 2-15.

FIGURE 2-15. Installer Path



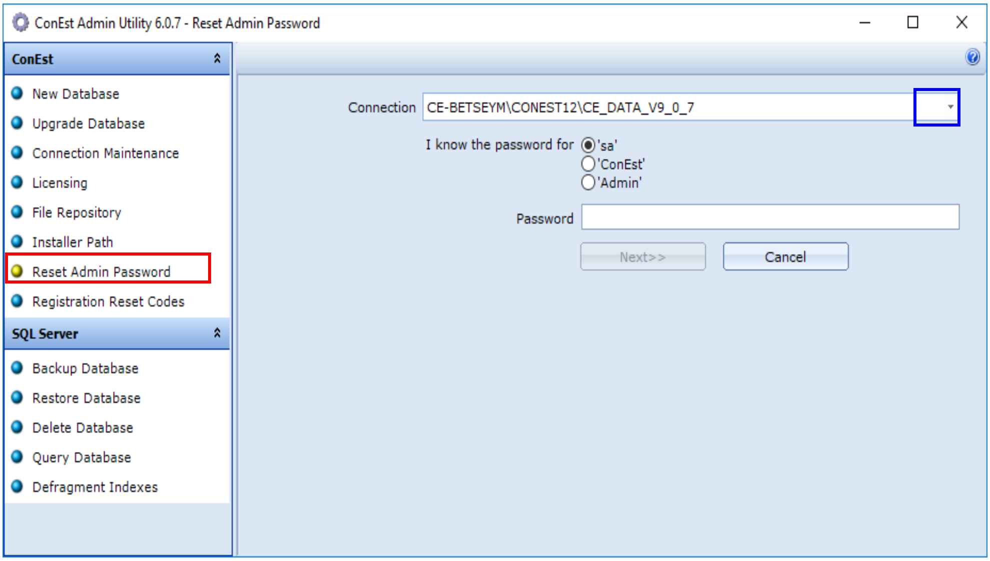
2. From the **Connection** drop-down list, select the SQL_Server you want to connect to.
3. Next to **Installer Path**, click the **Ellipsis** button and navigate to the folder where you will store upgrade files.
4. Enter the **'Admin' Password** and click Save.

Reset Admin Password

It is important to maintain security and reset the Administrator password. The software is delivered with the Admin password set to **admin** but the Administrator should change this soon after installing and setting up the users.

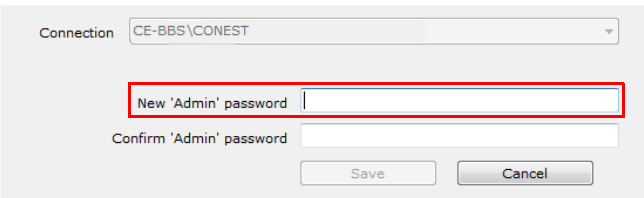
1. Select **Reset Admin Password** from the Sidebar menu as shown in Figure 2-16.

FIGURE 2-16. Reset Admin Password



2. From the **Connection** drop-down list, select the SQL_Server and database connection you want to connect to.
3. The Admin Utility allows you to change the Admin password as long as you know:
   - **'sa'** or SQL Server administrator password.
   - **'ConEst'** or the password set when the database was created.
   - **'Admin'** password which is the Administrator account password.
4. Select one of the radio buttons and enter the password. Click Next.
5. Enter the **New 'Admin' password** as shown in Figure 2-17.

FIGURE 2-17. New Admin password



6. Confirm the new password by entering it again and click Save.

Registration Reset Codes

This utility is used to reset the security codes for the USB Key. If your software included a USB key that you plugged into your computer during installation, this utility resets your access codes. The reasons why you may need to reset the codes are:

- You have just installed one of the ConEst products; all ConEst programs require one reset

- The payment schedule you elected requires a renewal code periodically or for security purposes, you have chosen to reset codes annually
- Occasionally, upgrades require a reset code

When you see a message indicating that you need a reset code, you can reset the codes yourself using the online Web Reset utility, available 24 hours a day, 7 days a week. Launch the web app by using the Home > Key Resets menu entry in the IntelliBid Sidebar menu or open the ConEst web site at www.conest.com/reset.asp (requires an current service contract) or call ConEst Technical Support at 800-662-7687 x2 during normal business hours (Monday through Friday, 7:30 am to 6 pm Eastern Time).

It is very important that you follow this procedure to ensure a successful reset of your key:

1. Ensure your computer is set to the correct date. The computer providing the reset codes is set to US Eastern Time zone. The time does not have to be the same, but you need the same date. Australian users may have to set their computer date back a day until after the reset is complete.

   The following link is a good site to check the date. Ours is the same as the 'Boston' time. http://www.timeanddate.com/worldclock/

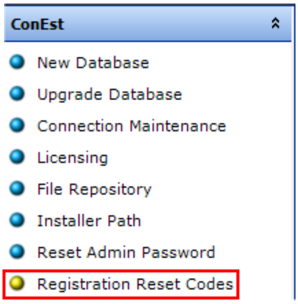
2. Have the correct key serial number. You can check the reset message or look on the key itself for the number. We will show you where to find this number in the instructions that follow.

3. Be sure to follow the reset code process completely until it logs you off. This will ensure you get all the resets available. Also, if you close the window before providing the confirmation codes, your account is temporarily disabled for resets and you will have to call 800-662-7687 x2 for Support and ask them to reset it for you.

Reset Code Instructions

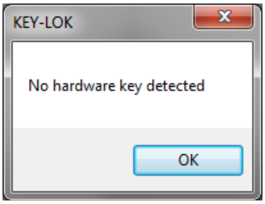
1. From Windows select Start > All Programs > ConEst Software > Admin Utility.
2. Select **Registration Reset Codes** from the Sidebar menu as shown in Figure 2-18.

FIGURE 2-18. Registration Reset Codes



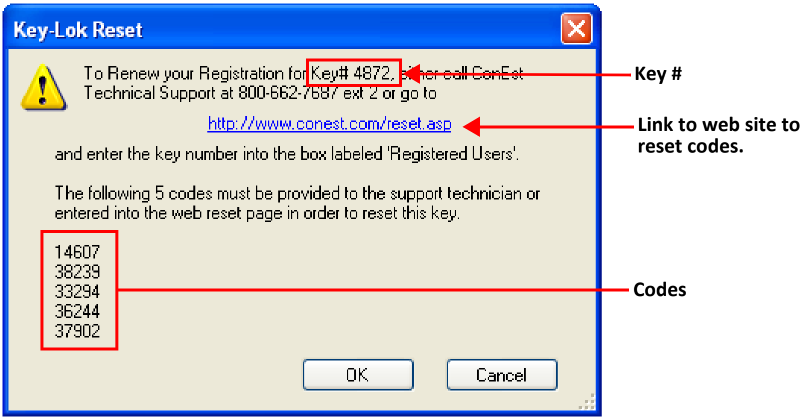
If the Admin Utility **cannot** locate a key, the *Key-Lok - No Hardware Key Detected* dialog box is displayed as shown in Figure 2-20. Click OK and contact **ConEst** Technical Support by calling 800-662-7687 x2 X2.

FIGURE 2-19. No Hardware Key Detected



3. If the key is not expiring or already set to *permanent*, a message will ask if you still want to proceed.
   - Click Yes to continue. When a key is located, the *Key-Lok Reset* dialog box is displayed as shown in Figure 2-20.

FIGURE 2-20. Key-Lok Reset dialog box



You will need the **Key #** and the **5 Codes** shown to proceed. This process only takes a few minutes to complete. The easiest method is to click the link to the **ConEst** website to reset your codes yourself or you can call Technical Support during normal business hours.

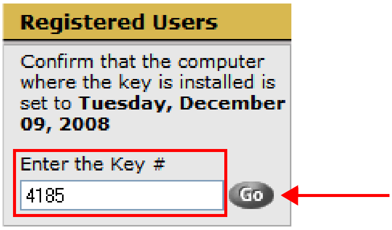
We will step through the internet web reset procedure.

1. Click the web page link shown in the *Key-Lok Reset* dialog box by or start your Internet browser and go to the site specified in this dialog box. This opens the web site to the Reset page in a separate window. This page also has complete instructions for preparing to reset keys. Read the web page before proceeding.

   You will be working with both the web page and the Admin Utility for this procedure. It will be easier if you resize and position the windows so you can see both.

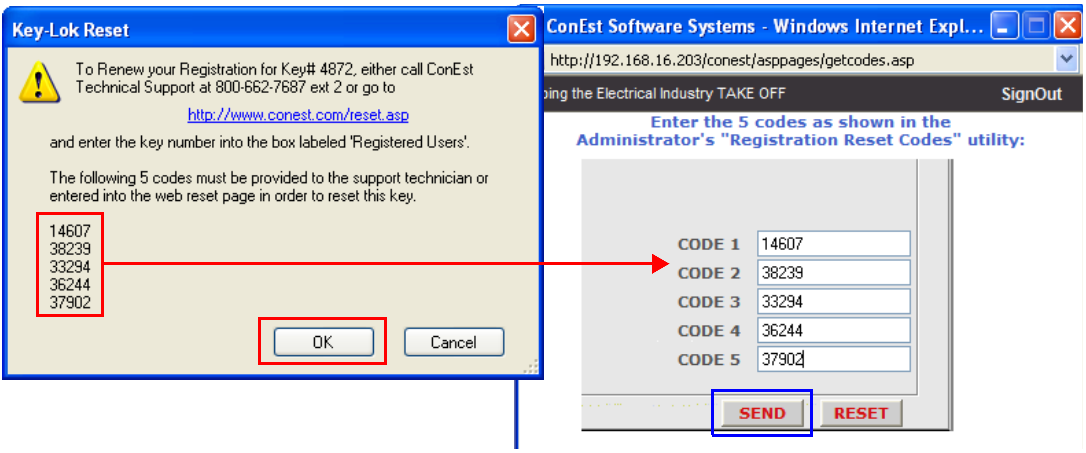
2. Enter your **Key #** in the box on the web site page and click Go as shown in Figure 2-21.

FIGURE 2-21. Registered Users



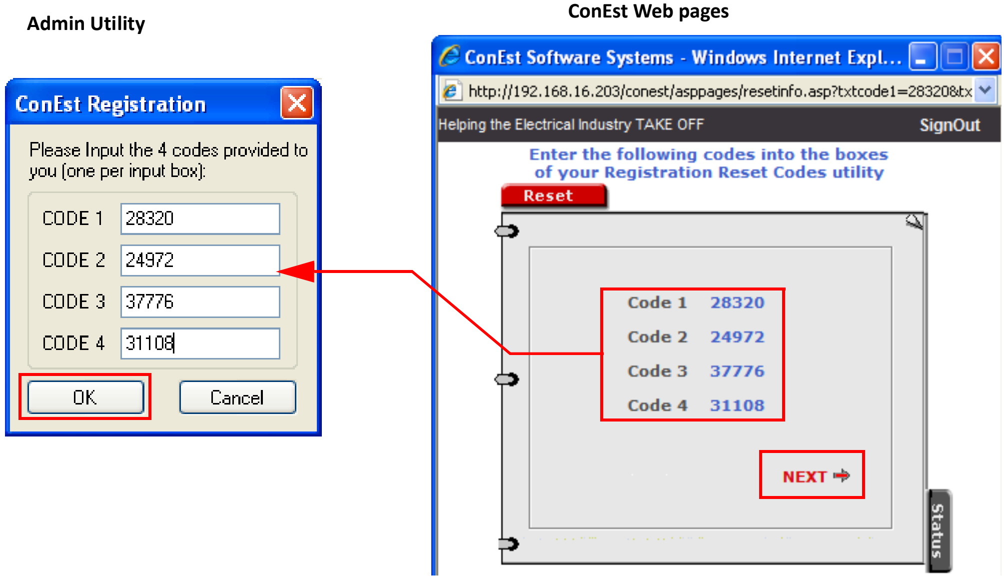
3. This displays a *ConEst Web page* dialog box with fields to receive the 5 codes listed in the Admin Utility as shown in Figure 2-22.

FIGURE 2-22. Admin Utility and ConEst Web page dialog boxes



4. Enter the 5 codes from the Admin Utility window into the web dialog box.
5. Click OK in the *Key-Lok Reset* dialog box and click **Send** on the *ConEst Web page* dialog box.
6. The web page displays a *Reset* dialog box with 4 codes and a *ConEst Registration* dialog box to receive those 4 codes. Enter the four codes from the web page into the Admin Utility dialog box as shown in Figure 2-23.

FIGURE 2-23. 4 Codes entered into ConEst Registration



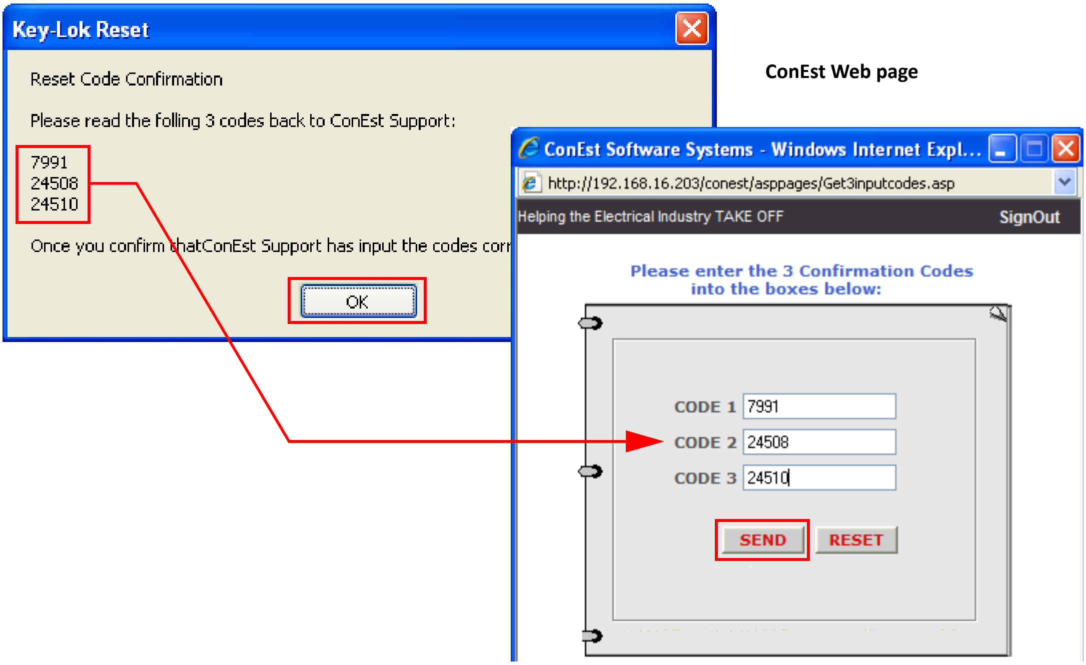
7. Click **OK** in the *ConEst Registration* dialog box and Next on the ConEst web page.

8. The Admin Utility displays the *Key-Lok Reset* dialog box with 3 codes which you type into the *ConEst Web page* dialog box shown in Figure 2-24.

FIGURE 2-24. 3 Codes entered into ConEst Web page

Admin Utility

ConEst Web page



9. Click OK in the *Key-Lok Reset* dialog box and **Send** on the ConEst Web web page dialog box.

10. The web site returns a reset successful message. It will also tell you if there are additional codes that need to be reset. If there are, we highly recommend you do this now. Continue by clicking on Yes on the web page and re-starting the Registration Reset Codes in Administration Utility.

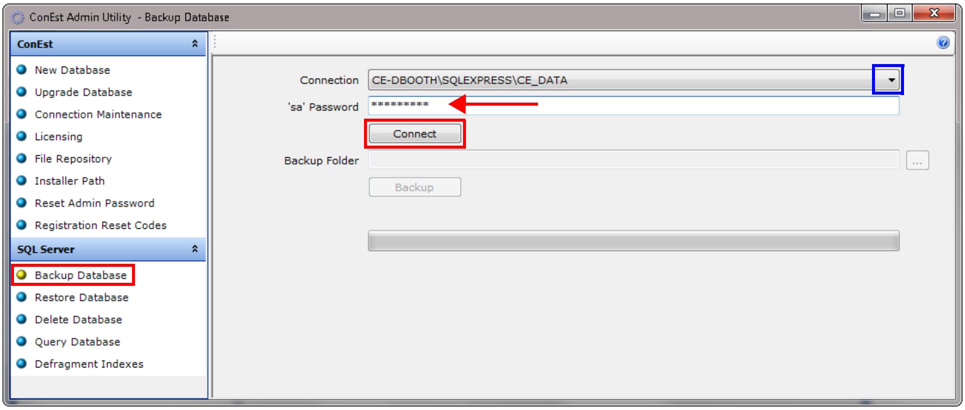
Note: If you have other keys that need resetting, you will have to do the reset from the workstation they are attached to or you can move the key(s) to your workstation, reboot and then reset the key. Remember to reboot when you move the key back to the original computer.

Close Admin Utility and launch IntelliBid.

Backup Database

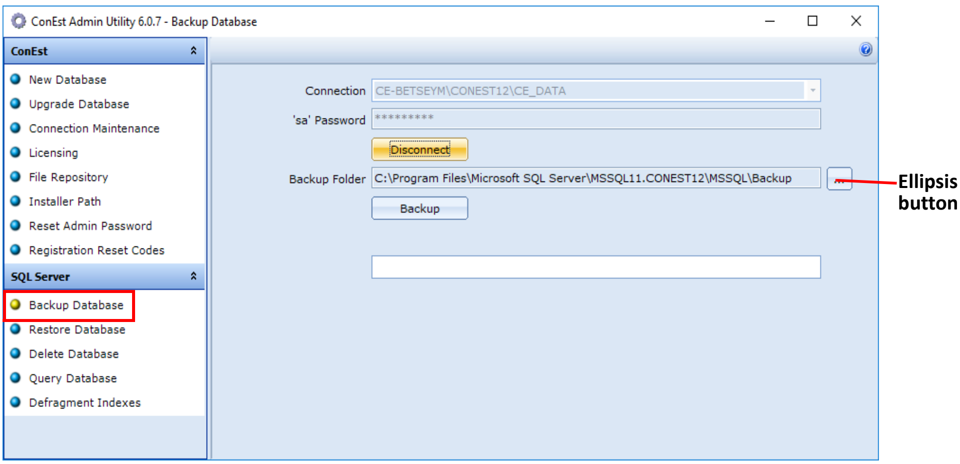
To create a backup of the database, open *Admin Utility* and select **Backup Database** from the Sidebar menu as shown in Figure 2-25.

FIGURE 2-25. Backup Database



1. From the **Connection** drop-down list, select the SQL_Server and database you want to back up.
2. Enter the **'sa' Password** and click Connect.
3. If the connect is successful, the default backup folder is displayed in **Backup Folder** as shown in Figure 2-26. If you want to change this, click the **Ellipsis** button and navigate to the directory you want to use. Click **OK**.

FIGURE 2-26. Backup Folder

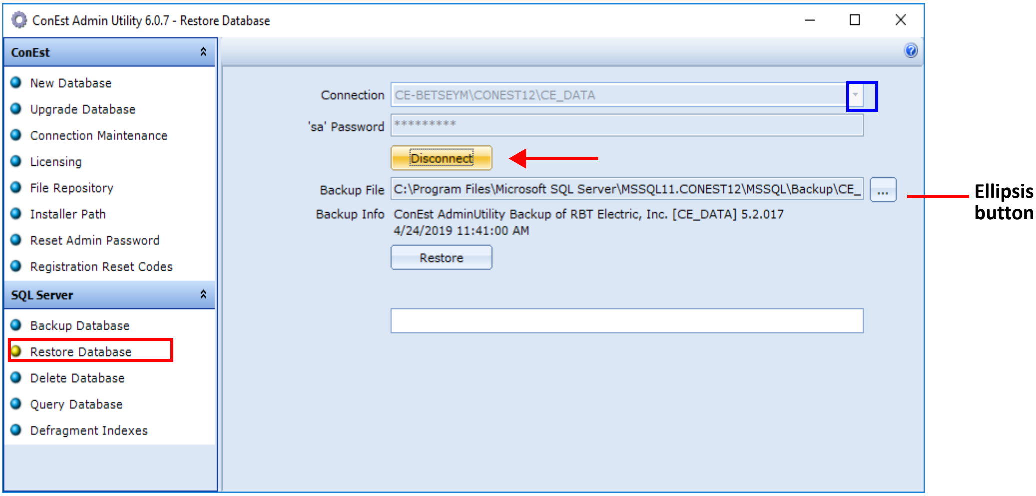


4. The folder where the Admin Utility will place the backup file is displayed. When ready, click the Backup button to begin the file backup. The bar below the button is a progress bar for the time remaining. A message will confirm the backup was successful.

Restore Backup

To restore a backup database file to the current directory, click **Restore Database** in the Sidebar menu as shown in Figure 2-27.

FIGURE 2-27. Restore Database



1. From the **Connection** drop-down list, select the SQL_Server and database you are restoring.
2. Enter the **'sa' Password** and click Connect (the button label changes to Disconnect).
3. If the connect is successful, the default backup file is displayed in the **Backup File** field. If you want to change this, click the **Ellipsis** button and navigate to the directory that contains the backup file you want to use. The file date is also displayed for information. Click Restore.
4. The bar below the button is a progress bar for the time remaining. A message will confirm the restore was successful.

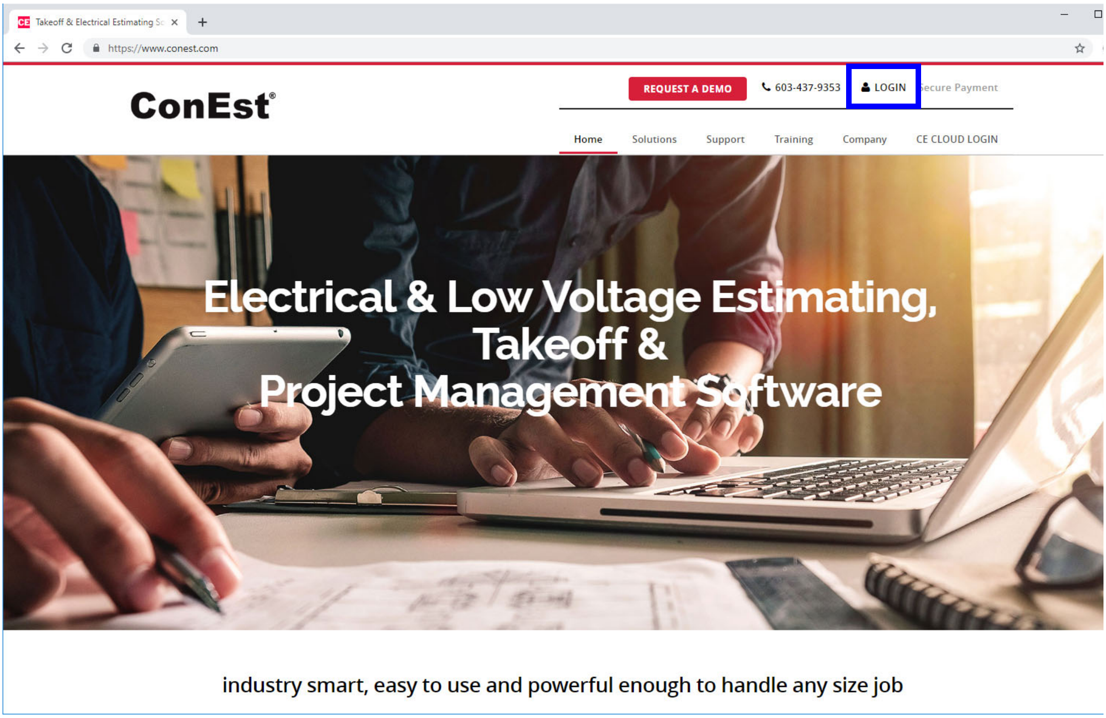
Online Service Center

The **ConEst Online Service Center** is an Internet bulletin board service developed and maintained by **ConEst Software Systems** and provided to all **ConEst** customers at no charge. You will find it most useful for downloading upgrades to IntelliBid as well as free technical support via email. All customers have access to Tech Support through the Online Service Center for the life of their customer status with **ConEst Software Systems**.

Online Service Center - ConEst web page

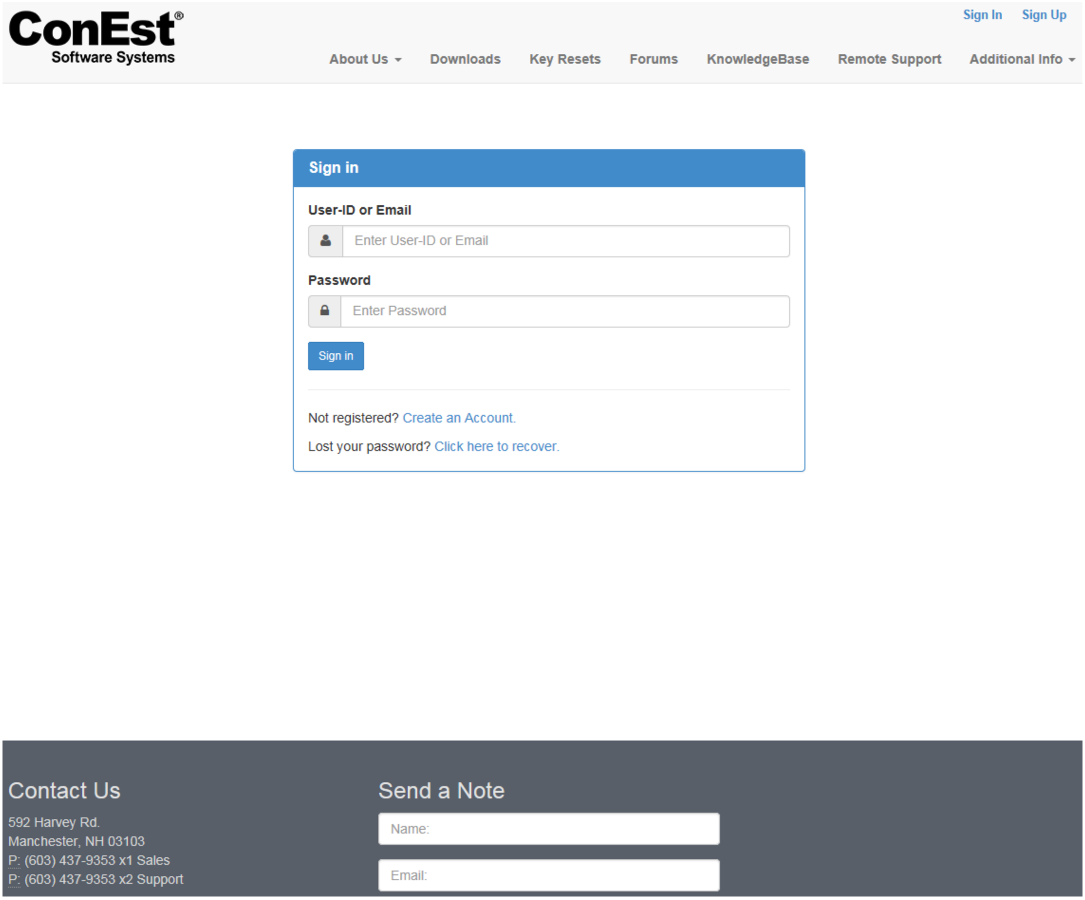
1. To access the **Online Service Center** please visit **www.conest.com** shown in Figure 2-28. The Customer Login button is located in the upper right corner of the home page.

FIGURE 2-28. ConEst web page



2. On the **ConEst** web page, click **Login**. The Customer Login web page is displayed as shown in Figure 2-29.

FIGURE 2-29. ConEst Customer Login web page

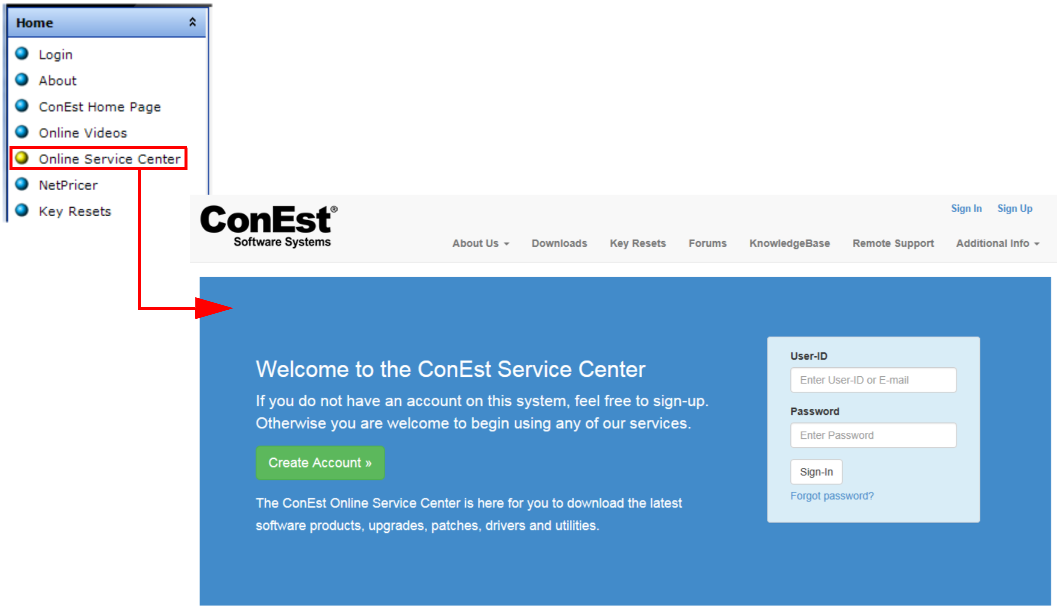


3. Sign up for a User account by clicking **Create an Account**.

Online Service Center - IntelliBid

4. In IntelliBid, select **Home** and click **Online Service Center**. The *ConEst Service Center web page* is opened as shown in Figure 2-30.

FIGURE 2-30. ConEst Service Center Web Page



5. Sign up for a User account by clicking **Create an Account**.

Sign Up

Fill in all of the fields and click the **Sign Up** button at the bottom of the page. Sign up is free, but you must have an account to access the functions of the Online Service. A current service agreement is required to download software.

After you complete the information on this screen and click the **Sign Up** button, you are automatically logged into a restricted account and notification is sent to ConEst Technical Support to authorize your account. During normal business hours, this takes only a few minutes. If you sign up after hours, your account will be authorized the next business day.

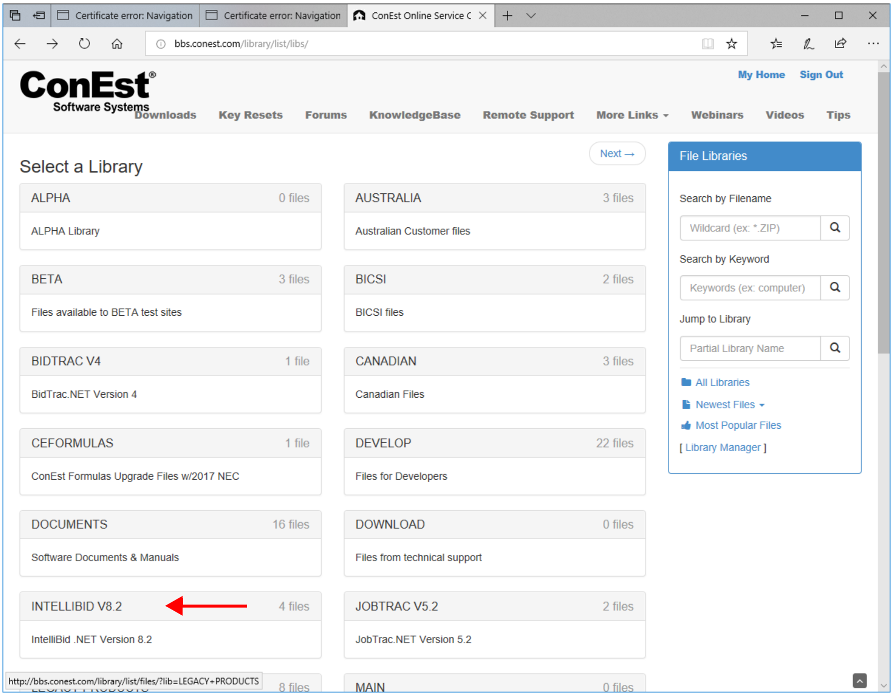
Once you have an account, click Login and enter the User ID and password you specified when you created the account.

You are now successfully logged into the Online Service Center. Use the buttons in the Toolbar to access the pages to download the latest product versions, reset your hardware key, view Frequently asked questions, etc.

Download Software Updates

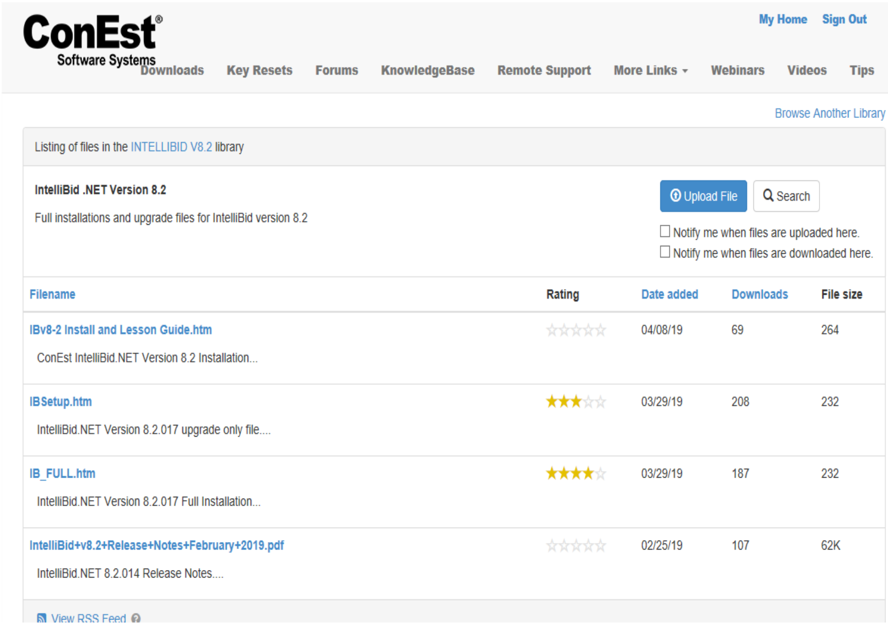
From the Toolbar, click the **Download** button. This opens the list of libraries with download files. All **ConEst** products are available from this download utility. The libraries are listed alphabetically with a short description of the files found in that library under the library name. To see the latest files on the site, click **List Newest Files** button. The **Most Popular Files** are listed with the number of times they have been downloaded as well.

FIGURE 2-31. File Libraries



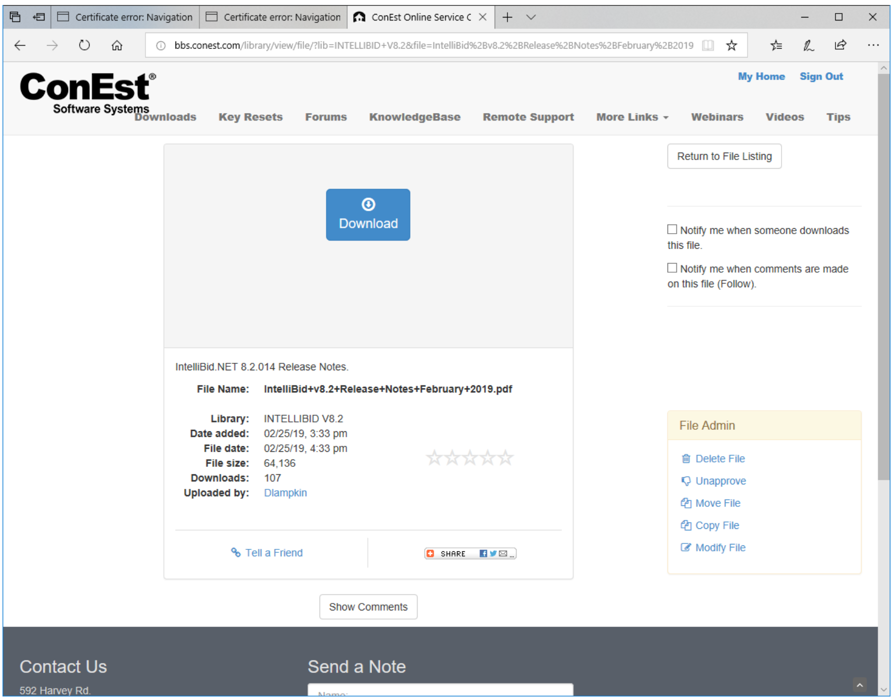
IntelliBid files are located in the library file named **IntelliBid V8.2**. Scroll through the list until you find this library. Click the IntelliBid library to display the files available for download.

FIGURE 2-32. IntelliBid v8 Library



Click the file you are interested in downloading.

FIGURE 2-33. IntelliBid v8 File Library



This tells you what is included in the download of this file. If this is what you are looking for, click the **Download Now** link. Your web browser will prompt you to either run the file from its current location or to save it to your computer. It is recommended that you save the file to your computer and run it from there.

Chapter 3

Lesson Guide

Introduction

The purpose of these lessons is to introduce the basic methods and functions for estimating a job and creating a bid in **ConEst** IntelliBid. Completing the lessons provides the background and experience needed to continue learning the full features available in IntelliBid and sets a solid base to take advantage of the ConEst one-on-one training sessions included with your purchase or when you participate in any of our on-line topic seminars or attend a training workshop.

We recognize there are many different methods of electrical estimating; this lesson is based on a standard method, but the software is designed to easily adapt to your personal style of estimating.

We cannot cover every aspect of IntelliBid in these pages. Consult the Online Help system for detailed information while you work and don't forget to take advantage of **ConEst Software Systems**' excellent training programs.

Reference

Overview

IntelliBid is an Electrical Estimating software package that helps you prepare takeoffs and bids as you normally would, but in a fraction of the time it takes to do them by hand, and increasing your efficiency and accuracy.

IntellliBid can generate an estimate for any type of electrical project, plus it has many advanced features that help you prepare the *winning bid*. These features go above and beyond the standard *audit trail*, *estimate summary*, and *create bid* features found in less powerful estimating software. IntelliBid's Smart Estimating performs labor adjustments automatically based upon installation conditions. Smart Substitution using built-in NEC tables will help *value engineer* the estimate and Advanced Breakout allows you to unit-price items or assemblies to arrive at a retail cost per unit.

Who Should Use this Lesson Guide?

Anyone who will be using IntelliBid and would like to learn quickly, from the novice estimator right on through to the veteran estimator and project manager.

How to Use this Lesson Guide

There are two practice takeoffs in the Takeoff sections. The first takeoff demonstrates navigating libraries and using takeoff settings. The second takeoff is more detailed and shows how to use phasing and how to format your bid.

The Bid Section will use Bid Template Maintenance to set up a bid template with the rates and values you commonly use. This will provide the basic default bid template for your future jobs. We will then use this template to demonstrate how to create multiple bids using the last job you created in the Takeoff.

Prerequisites

The lessons start with IntelliBid installed and set up for your installation and users:

- The system administrator has installed, set the licensing and created the database
- The administrator has assigned and you have received your User ID and Password
- Your company information has been entered along with your company's employees.

See "Administration Setup" in the IntelliBid Installation Guide for more information.

Note: There will be differences in screens and values if the steps presented in these lessons are not followed exactly or there have been upgrades to the software. You should still be able to follow and make selections based on your knowledge and experience in the industry.

Other Sources of Help Information

If you have any questions about IntelliBid beyond this Lesson Guide, here are some other sources of assistance:

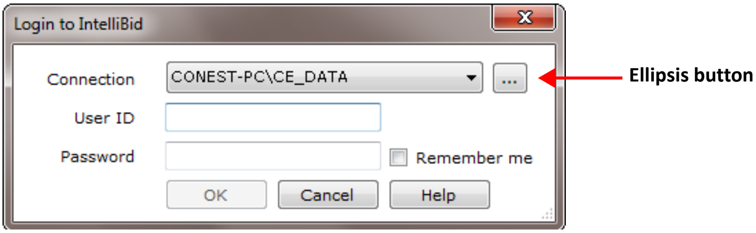
- If you have a question related to the use of Windows, refer to your Windows manual or Online Help (http://support.microsoft.com). Many useful Windows reference books are at your local book or computer store.
- Check the website, www.conest.com, for the schedule of our Online Training seminars that focus on specific topics.
- For information on how to contact our Technical Support team, refer to page ii in the front of this manual.

Start Up

Launch IntelliBid by clicking on the desktop icon (or Start > Programs > ConEst Software Systems > ConEst IntelliBid.NET**)**.

The *Login to IntelliBid* dialog box lists the connection to your SQL Servers with the User ID and Password as shown in Figure 1-1.

FIGURE 1-1. Login to IntelliBid dialog box

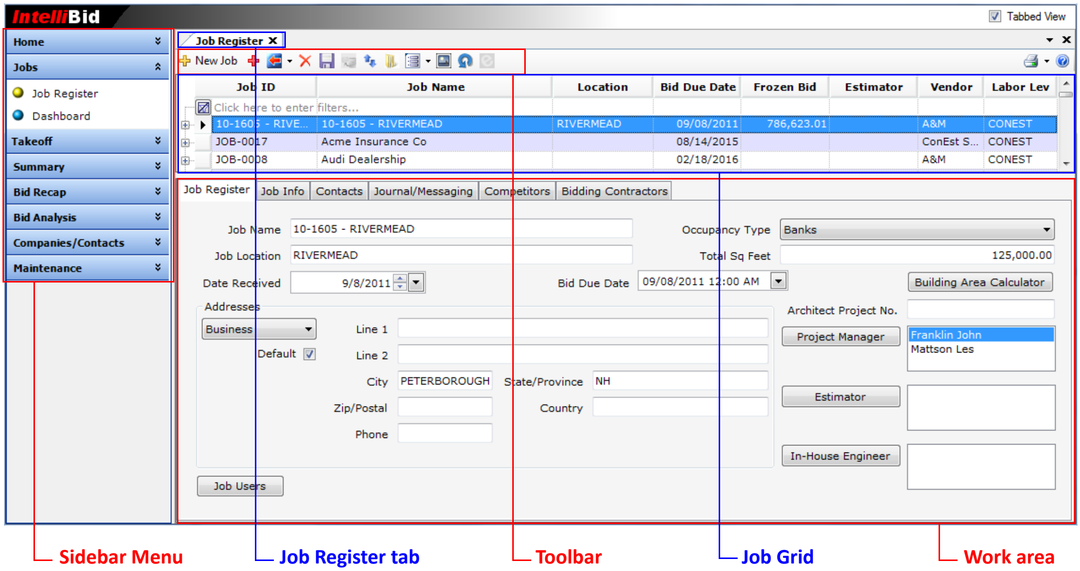


1. Select your SQL server from the Connection drop-down list. If a server is not listed here, use the Ellipsis button to the right of the drop-down list to select the server where the database is located (your administrator will have this information).

Note: You will see the Ellipsis button throughout the software. It represents a Browse function for locating a file on your network.

2. Enter the **User ID** and **Password** set up for you by the administrator. Click OK to log in.
3. The IntelliBid window opens to the Jobs > Job Register tab as shown in Figure 1-2.

FIGURE 1-2. IntelliBid Job Register window



Sidebar Menu

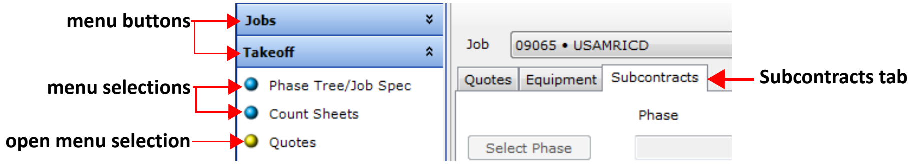
Sidebar Menu - The Sidebar Menu buttons are on the left side of the work area. Clicking the arrow on a button opens the menu selections associated with the button without changing the current tab open to the right. Clicking the blue menu buttons opens the default selection. See Figure 1-3.

FIGURE 1-3. Sidebar Menu

Clicking on the yellow menu selection will open that selection and display it as a tab above the Toolbar.

We use the notation Takeoff > Quotes > Subcontracts tab to refer to the selection and tabs, in this example: Takeoff button, **Quotes** selection and the Subcontracts tab. See Figure 1-4.

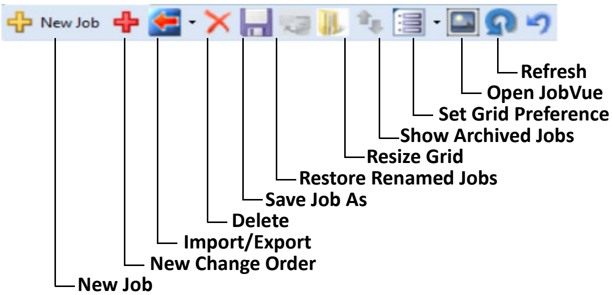
FIGURE 1-4. Notation



Toolbar

Toolbar - The Toolbar contains the operations for the current selection. The toolbar will change based on the Sidebar Menu button selected. Tool tips are displayed when the mouse is paused over these buttons. See Figure 1-5.

FIGURE 1-5. Jobs Toolbar

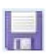


 **New Job** — Adds a New Job to the system. It displays a dialog box to add Job ID, Job Name, Assign a Bid Template, a Bid Name and to Link the tax rate.

 **New Change Order** — Adds a new Change Order to the selected Job. Change Orders are handled the same as a job - with all the same functions and capabilities; they are just linked to the parent job to consolidate the information.

 **Import, Export and Archive Jobs** — This function will import, export, check-in and check out and archive jobs.

 **Delete** — Removes the selected record(s) from the active list.

 **Save As** — Copies the selected job allowing you to select categories of job data and saves it to a new job file.

 **Restore Renamed Jobs** — Adds a New Job to the system. It displays a dialog box to add Job ID, Job Name, Assign a Bid Template, a Bid Name and to Link the tax rate.

 **Show Inactive Jobs** - Lists the jobs that have been archived or checked out.

 **Set Grid Preferences** - Click the arrow to display a check box for **Display all grid columns within the visible area**. Columns in most grids can be resized. The positions are automatically saved for the next time the selection opens. If you want to keep the column widths you set, <u>uncheck</u> this preference. This setting applies only to the open window; it is not a global setting.

Some of the common tools used on other toolbars:

JobVue - Provides a place to load pictures and other images related to this job.

Refresh - Performs a re-calculation of the takeoff values displayed in the screen.

Resize grid displays the grid full window. This makes working with the Takeoff (for example) easier by allowing you to view more of the selection records at once. Click the Resize grid button again to return the view to the default.

Show Archived Jobs appears in Jobs and Companies. These records are archived rather than completely removed and retained in your database for historical analysis and calculations. To view the list of archived records, click this button. Click the button again to display the active records.

Find displays a dialog box to locate specific records, notably Items in Takeoff, Summary, and Item Maintenance.

Restore archived changes the status of the selected archived record to *active* status. This button is enabled when viewing deleted records (see the Show Deleted function).

Print report lists the reports available in the open section. The arrow next to the icon displays the list of reports available on this screen. Click the button to run the default report. The Print Preview preference has been set on as a default which displays a preview of the report.

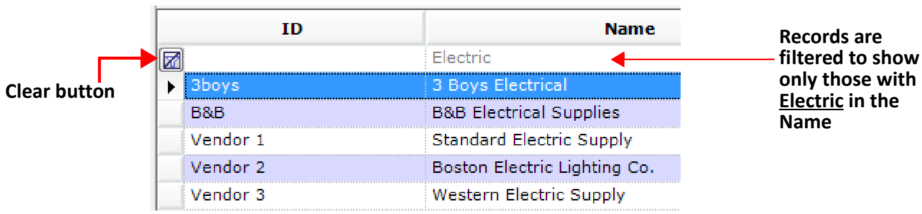
Grid functions - There are a few common grid functions:

- The grid space can be resized. Move the cursor over the bar between the grid and the tabbed section until the cursor changes to . Left-click and drag the boundary to the position you want.
- The columns in most grids can be resized. Move the cursor over the column divider in the header until the cursor changes to . Left-click and drag the column to the width you want.
- **Sort -** Most columns can be sorted in ascending (^) order by clicking on the column header. To sort descending (v), click the column label a second time. See Figure 1-6.

FIGURE 1-6. Sort function

- **Filter -** Most grids have a filter function. The first row of each grid has a row with a Clear button and the text <u>Click here to enter filters....</u> Click a field in this row, type a phrase and press **Enter**. The grid displays only the records that contain that phrase. See Figure 1-7.

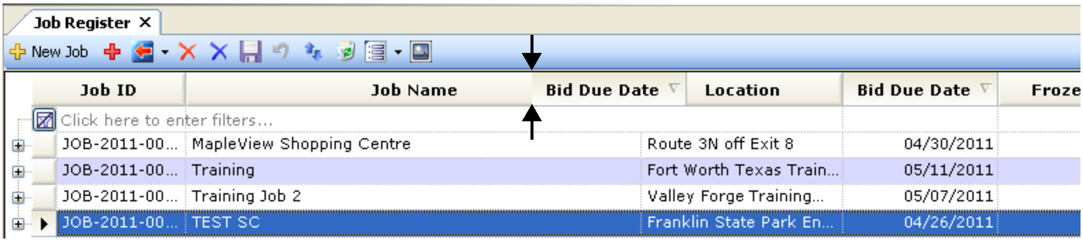
FIGURE 1-7. Filter & Clear button



To display all the records again in the grid, click the **Clear** button at the beginning of this row.

The columns in some of the grids can be moved or reordered. Left-click on a column header and drag it to the location you want. For example, the **Bid Due Date** in the Job Register is being moved so it appears after the **Job Name**. See Figure 1-8.

FIGURE 1-8. Moving a Column



Left-click on the **Bid Due Date** column header and drag it to the left. When it gets to a position it can be moved to, the 2 arrows appear. Release the mouse and the column will be *dropped* in the new location.

Note: The columns in Bid Recap and Quotes cannot be moved.

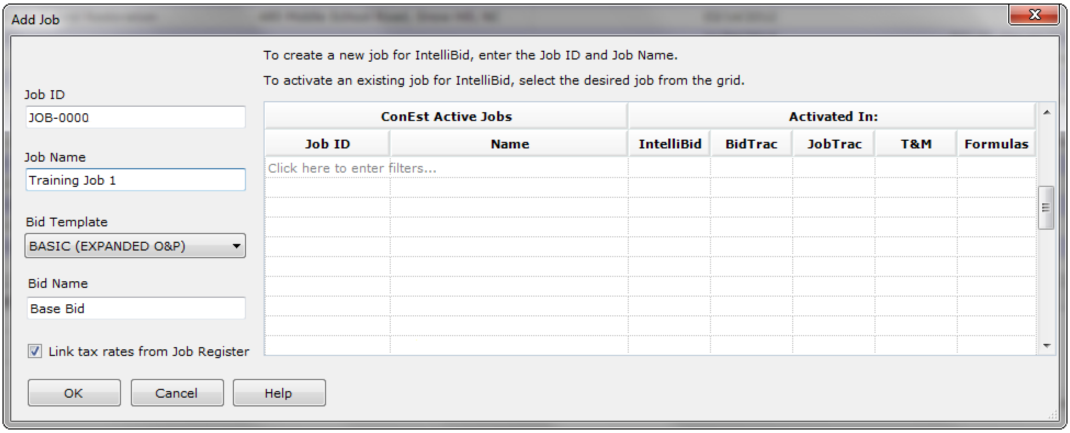
Lesson 1 — Jobs

This is the starting point for estimating a job. All you need is the Job ID and Job Name to get started.

Creating a Job

1. On the **Sidebar Menu**, click **Jobs** to open **Job Register**.
2. On the Toolbar above the Job Grid, click the New Job button. The *Add Job* dialog box is displayed as shown in Figure 1-9.

FIGURE 1-9. Add Job dialog box



3. Enter a Job ID. IntelliBid is delivered with the Job ID preset to <Autonumber> and JOB-0000. If your Job-ID field is blank, enter JOB-0000. Refer to “Job ID Auto-Numbering” on page 1-12 for more information.
4. Enter a Job Name. The name your enter needs to be descriptive enough for you to identify with since it appears on reports and proposals.
5. Leave **Bid Template** set to **Basic**. Use the drop-down list to select a different template as the job requires.
6. The **Bid Name** is set to **Base Bid** as a default. You can edit the default bid name by typing your own. You can also change the default Bid Name in Maintenance > Preferences > Names tab. Click OK.

   The job is added to the Job Grid. The work area has fields for the job information in tabs.
7. Click Contacts tab. Select Companies that you will be working with on this job. This is an important step because only companies assigned to this job will be listed in drop-down lists while working on this job.

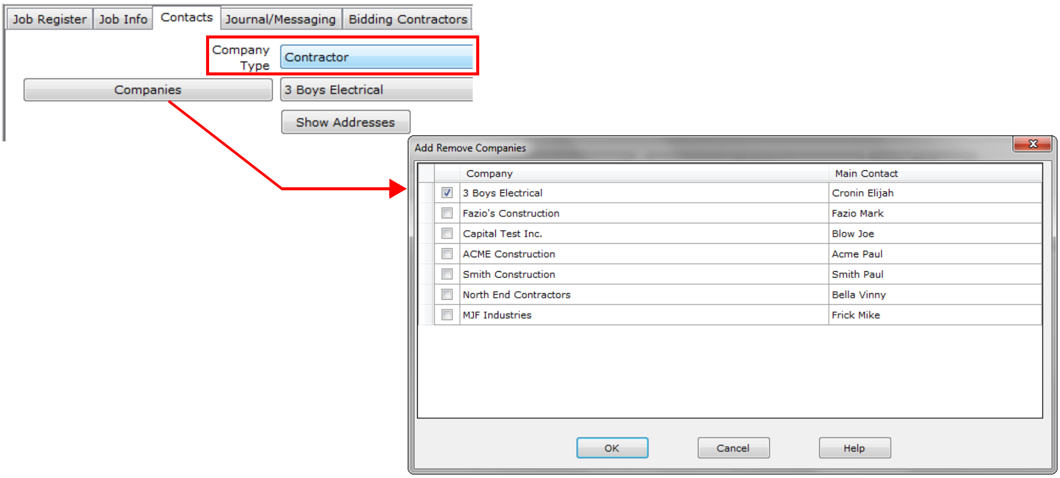
Note: If no Companies have been entered, go to “Lesson 6 — Adding Companies & Contacts” on page 1-51, add companies & contacts and return to step 7.

8. On the **Company Type** drop-down list, select a **Contractor** you will bid this project to as shown in Figure 1-10.

9. Click the Bidding Contractors tab. The contractor you selected in step 8 should appear in the list. Click the **Bid** check box so this contractor will receive the proposal you create. Click the Contacts tab.

10. Click Companies to display the *Add Remove Companies* dialog box as shown in Figure 1-10. A list of the companies that have been assigned as a Contractor is shown.

FIGURE 1-10. Add Remove Companies dialog box

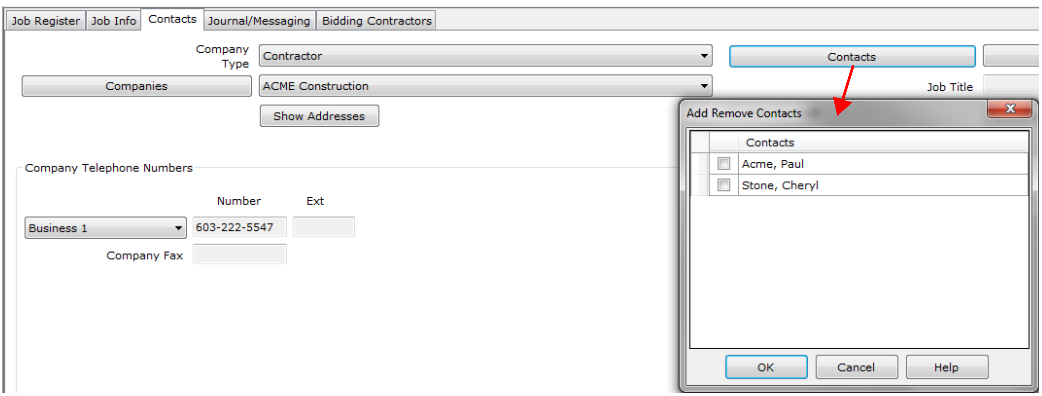


Note: If you do not see the company you are looking for, the Company may not have been added in the Companies/Contacts section yet, it may have a different Company Type or no company type was assigned. Return to the Companies tab to verify company and company type.

11. Click the check boxes to assign companies to the job. To remove a company, uncheck the box. Click OK.

12. Click the Contacts button to display the *Add Remove Contacts* dialog box as shown in Figure 1-11.

FIGURE 1-11. Add Remove Contacts dialog box



Select contacts for the Companies that are displayed in the **Companies** drop-down list. If only one contact was entered for a company, that contact is automatically selected. When there are multiple contacts, check the contacts working on this job.

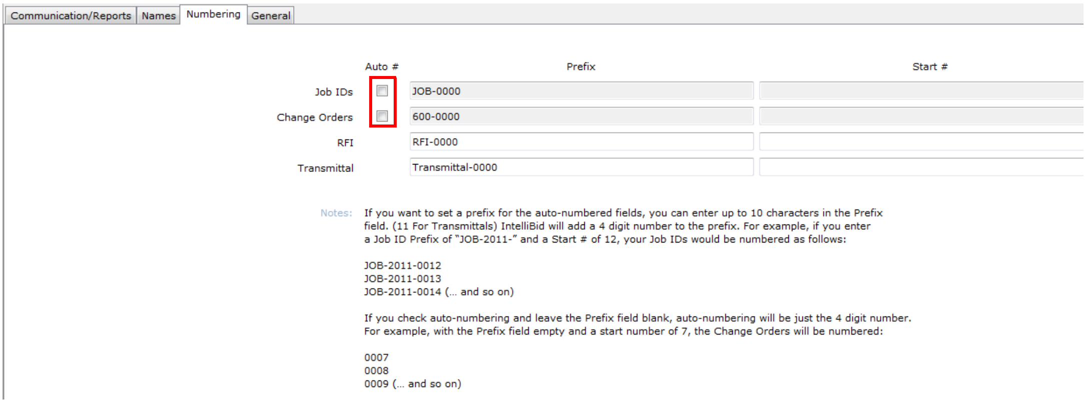
Repeat this procedure for each company on this job. Change the **Company Type** from the drop-down list and select other companies types (i.e. Material Vendor, Engineer, etc.) for this job.

For Bidding Contractors, if you plan to send an email copy of the bid to the contact, be sure an email address was entered. Refer to “Companies/Contacts” on page 1-51 for more information.

Job ID Auto-Numbering

Job ID autonumbering is on as a default setting when you first receive the software. This automatically sets the Job ID to a sequential number with the format JOB-00001. The ID format can be changed as well as turning off the preference if you want to enter your own Job IDs. On the **Sidebar Menu**, select Maintenance > Preferences and then select the Numbering tab as shown in Figure 1-12. To turn off or change the auto-numbering for jobs, click the check boxes.

FIGURE 1-12. Numbering tab



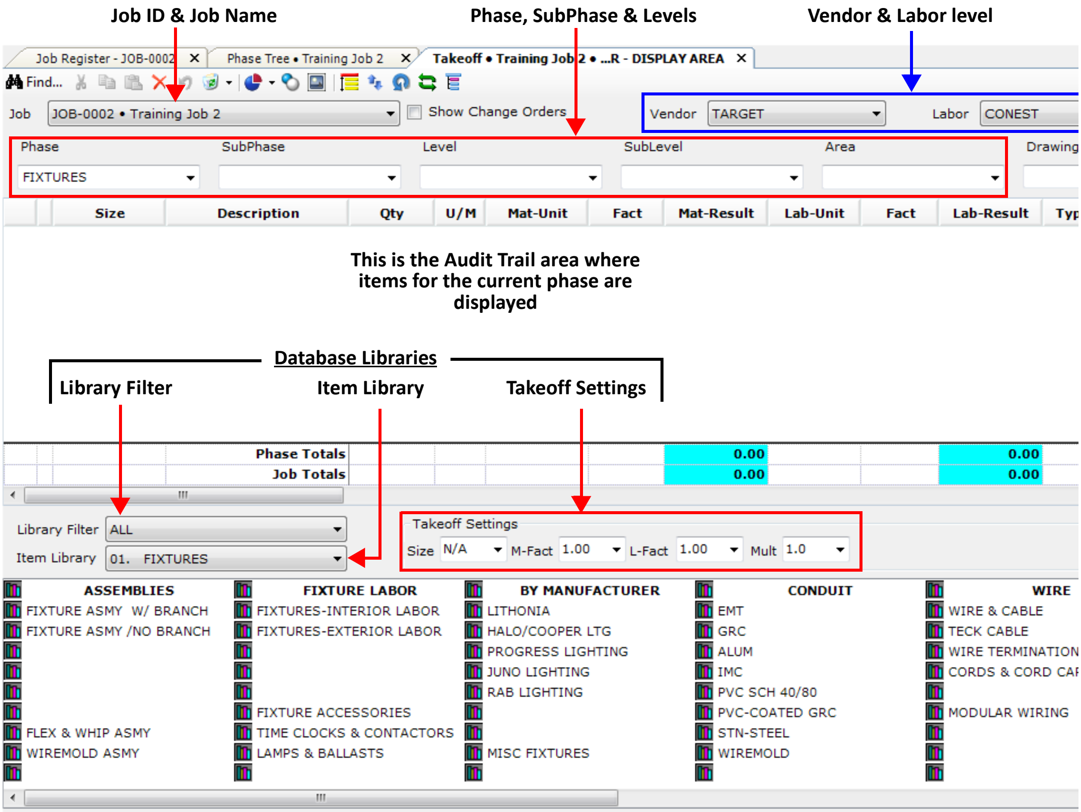
The Prefix for Autonumbering is set to JOB-0000 and will increment by 1 from that point forward. There are a variety of ways to set up your job numbering sequence. Another suggestion is to create a prefix of Jan 2015 and start the numbering at 0000 to track all jobs bid in January, then reset in February; Feb 2015-0000, to record and track number of jobs bid month-to-month.

Lesson 2 — Basic Takeoff Procedures

The Takeoff window is where you build the estimate. We will start with a very basic takeoff to describe the use of the libraries. On the **Sidebar**, select **Takeoff** with the phase **FIXTURES** displayed at the top. Refer to Figure 1-13.

1. The Takeoff tab contains an area which is referred to as the Audit Trail. A Job Grid is created with a list of items you choose from the data libraries.
   - **Job ID & Name** — The selected job is displayed in the **Job** drop-down list.
   - **Phase, SubPhase, Level, SubLevel & Area** — Indicates the Phase you are currently working in. There are also drop-down lists so you can easily change phases while you work. Phase breakdown labels can be changed to meet your own preferences for a job or all jobs: i.e, Phase, Building, Floor, Systems, Sheets (drawing) etc. can be changed in Phase Tree > Job Spec or in Maintenance > Master Phase Tree.
   - **Vendor & Labor Level** — Selections are displayed in drop-down lists. Default settings may be selected in Maintenance > Preferences > General tab.
   - **Database Libraries** — Located at the bottom of the window. Select items and assemblies for takeoff from these libraries. The **Item Library** shown is 01. FIXTURES which has been set as the default library for the Fixtures phase. There are *many* libraries available using this drop-down list.
   - **Takeoff Settings** — Allows setting the Takeoff conditions for material to appear on the Audit Trail. If 2" pipe is to be used, **Size** can be set to 2 for 2" pipe and all associated fittings. **M-Fact** sets a multiplier to the cost of material, **L-Fact** sets a multiplier to the Labor. **Mult** is used to take off an incremental amount of material, i.e if set to 2, taking off 100' of pipe would show 200' on the Audit Trail.

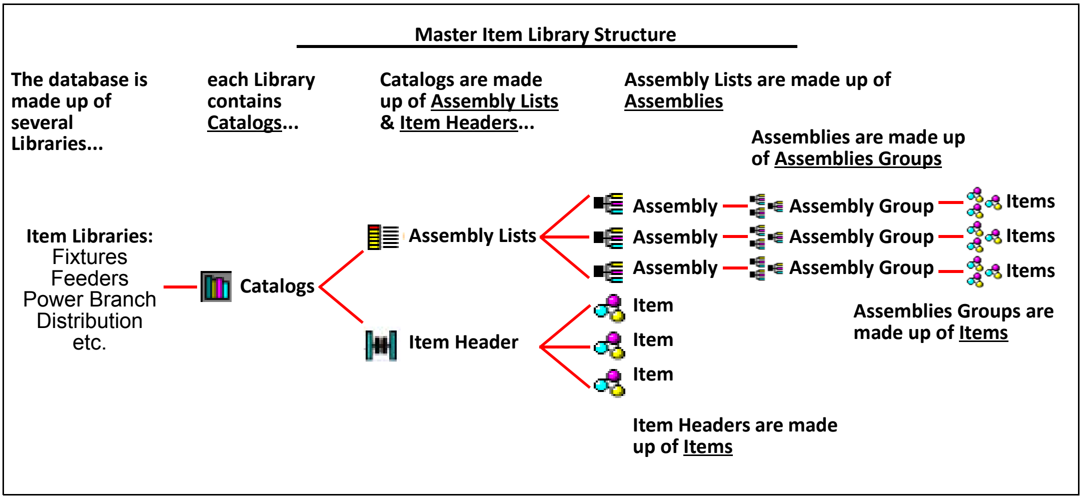
FIGURE 1-13. Takeoff work area



Item Database Structure

Finding material in the IntelliBid database is easy as it is organized around Libraries and Catalogs that contain commonly used material for that portion of the estimate. The Item Library database is organized in levels that you drill-into to find the required material or assembly. It's a collection of 39 libraries organized by Electrical, Voice/Data Cabling, Residential, Low Voltage and Medium/High Voltage items. Each **Item Library** is made up of **Catalogs,** and each Catalog may contain **Headers** and/or **Assembly Lists.** Each Header contains any number of **Items** and each Assembly List contains any number of **Assemblies** which contain any number of items as shown in Figure 1-14.

FIGURE 1-14. Master Item Library Structure

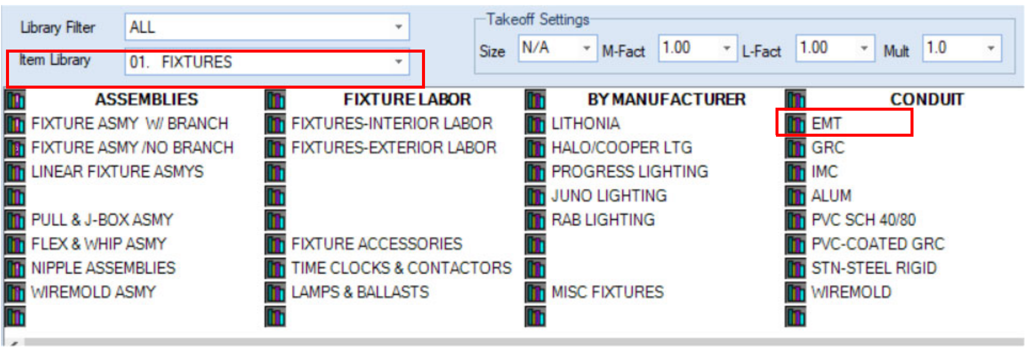


Currently you are viewing catalogs for the FIXTURES Library in the Takeoff window as shown in Figure 1-15. We'll start by performing a single item take off run of EMT.

Single Item Take off

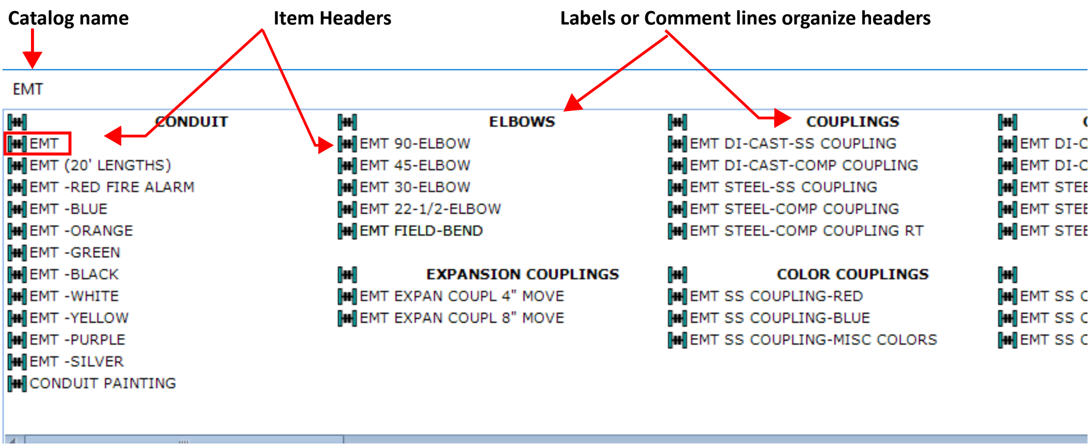
2. Click the Catalog item **EMT** as shown in Figure 1-15.

FIGURE 1-15. Select EMT



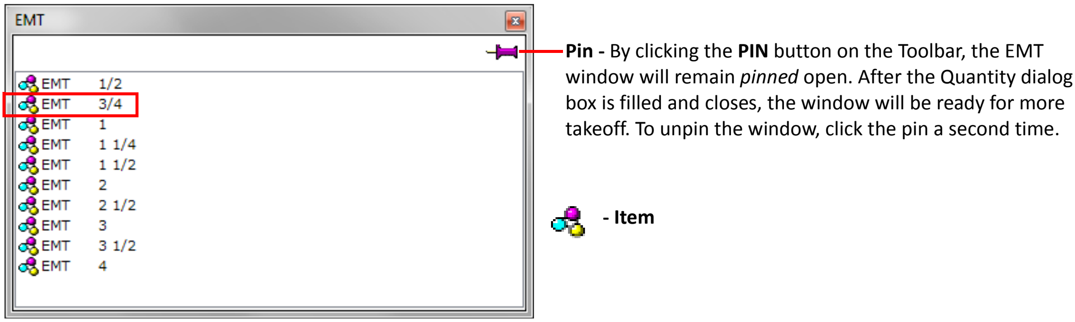
3. This will display the *EMT* item header window as shown in Figure 1-16. Under CONDUIT, select **EMT**.

FIGURE 1-16. EMT item header window



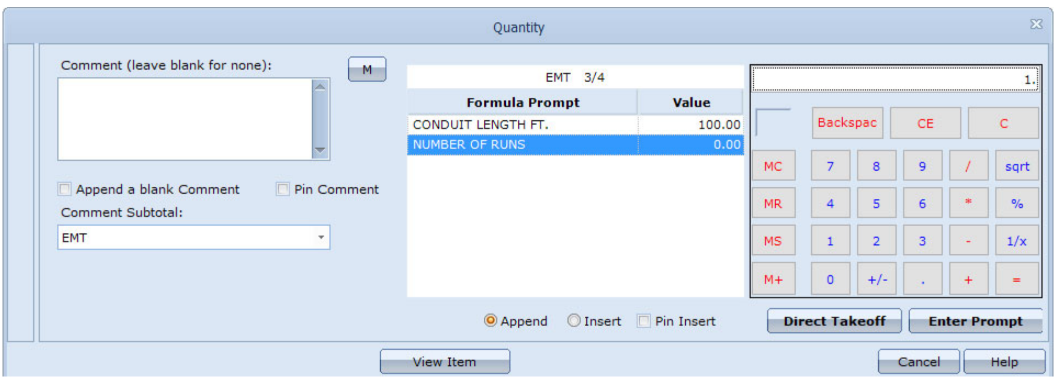
4. This displays the *EMT* item window and lists items by size. Select **EMT 3/4** as shown in Figure 1-17.

FIGURE 1-17. EMT item window



5. This will display the *Quantity* dialog box as shown in Figure 1-18. Enter information needed to calculate the correct quantities for takeoff. For a run of EMT, we need to know the Conduit Length.

FIGURE 1-18. Quantity dialog box



6. CONDUIT LENGTH is selected by default. Enter the number **100** by mouse-click, type on the calculator key-pad or type on the keyboard.

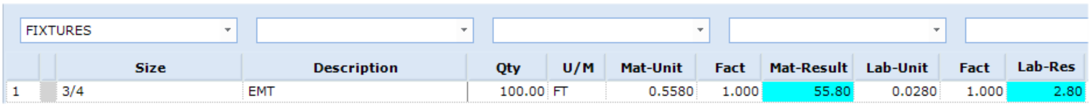
7. Press **Enter** or mouse-click the Enter Prompt button after each entry. The cursor automatically selects the next Formula Prompt on the list.

   - **Direct Takeoff** — Pressing this button accepts the entry, skips the remaining Formula Prompts and places the result in the Audit Trail.

   - **Enter Prompt** — Accepts the value enter and moves the highlight to the next Formula Prompt for entry.

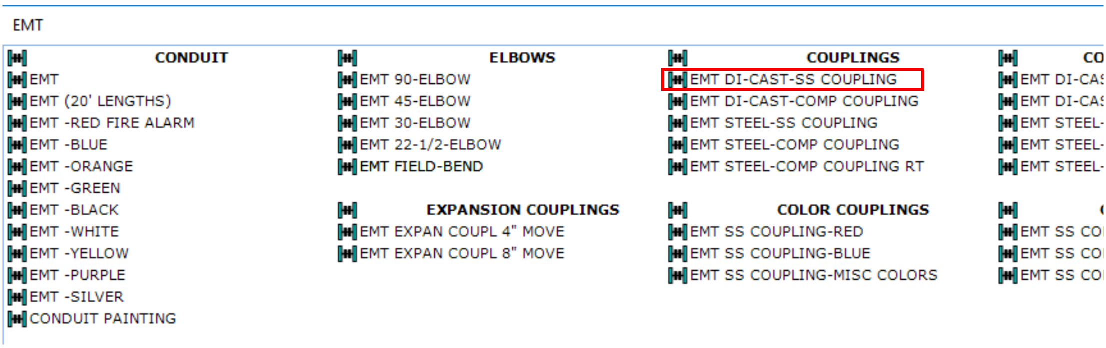
8. Notice NUMBER OF RUNS is already selected. Enter **1**. The *Quantity* dialog box closes and **EMT** is added to the Audit Trail as shown in Figure 1-19.

FIGURE 1-19. Audit Trail entry



9. The *EMT* item header window should still be open. If closed, click **EMT** from the FIXTURES library again. Select **EMT DI-CAST-SS COUPLING** as shown in Figure 1-20.

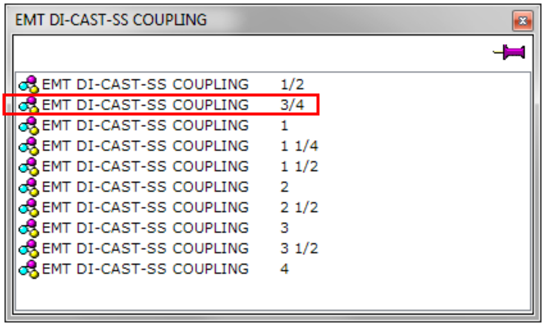
FIGURE 1-20. EMT item header window - EMT DI-CAST-SS COUPLING selection



Note: When you return to the Takeoff window and your dialog box is not displayed, press Alt/Tab to locate and re-display the dialog box or window you were working on.

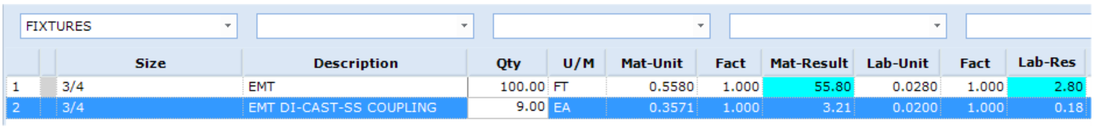
10. This will display the *EMT DI-CAST-SS COUPLING* item window as shown in Figure 1-21. Select **EMT DI-CAST-SS COUPLING 3/4**.

FIGURE 1-21. EMT DI-CAST-SS-COUPLING item window - 3/4 selection



The **EMT-DI-CAST-SS COUPLING** is added to the Audit Trail as shown in Figure 1-22.

FIGURE 1-22. Audit Trail addition



FIXTURES

	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Res
1	3/4	EMT	100.00	FT	0.5580	1.000	55.80	0.0280	1.000	2.80
2	3/4	EMT DI-CAST-SS COUPLING	9.00	EA	0.3571	1.000	3.21	0.0200	1.000	0.18

The quantity of Di-Cast Couplings is not a required entry because couplings have a built-in formula that specifies 1 coupling for each 10’ of pipe. The 100’ length entered for the EMT is stored in memory and the number of couplings is calculated based on the 100’ **as long as you are in the same catalog**, i.e. the EMT Catalog. If you had closed the EMT catalog, the *Quantity* dialog box would open and ask for the conduit length again.

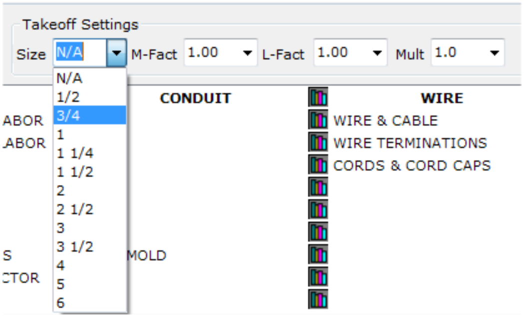
11. The EMT Catalog window should still be open. Close the <u>EMT Catalog window</u>.

Notice with both of the previous items, we chose the 3/4” size from a list of all sizes. There is a <u>Size</u> setting you can use to simplify the takeoff. Use this when the job requirements specify a size; it will save time.

In the center- bottom of the Takeoff area there is **Takeoff Settings**.

12. Click the Size drop-down list and select **3/4** as shown in Figure 1-23. The Takeoff Settings selected will apply <u>only</u> to this phase for this session. This will reduce the number of key strokes required when entering material related to the setting (in this example 3/4” pipe). All related installation material couplings, connectors and supports will automatically default to 3/4".

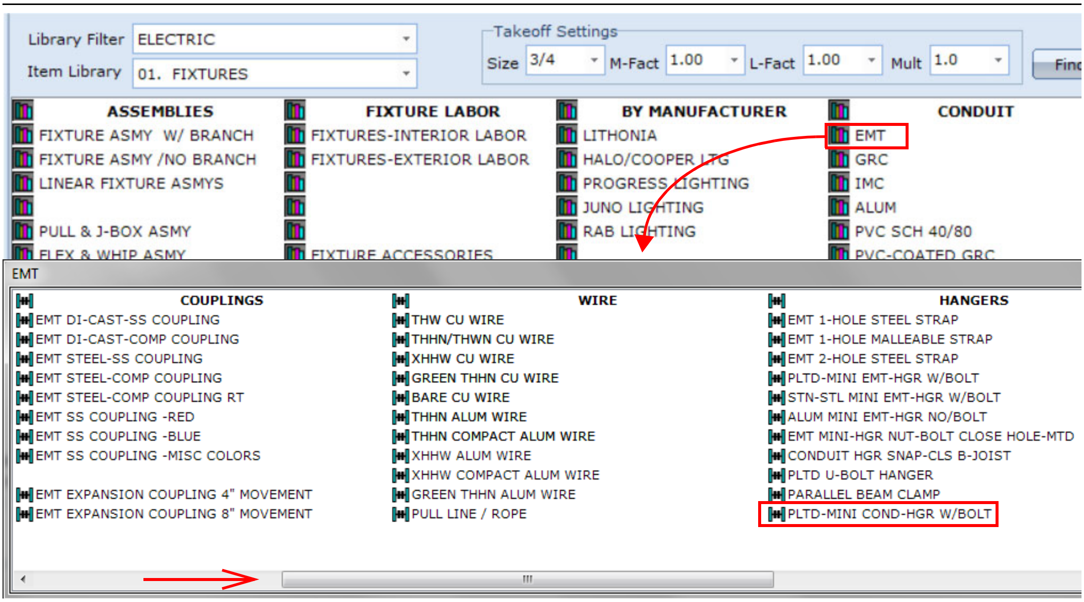
FIGURE 1-23. Takeoff Settings - Size



There are other methods to pre-set values for Takeoff. Refer to topics on Job Specifications in the Online Help files.

13. Using the same steps as before from the FIXTURES library, select **EMT**, then scroll the EMT item header window to the right to HANGERS and select **PLTD-MINI COND-HGR W/BOLT** as shown in Figure 1-24.

FIGURE 1-24. Select PLTD-MINI COND-HGR W/BOLT



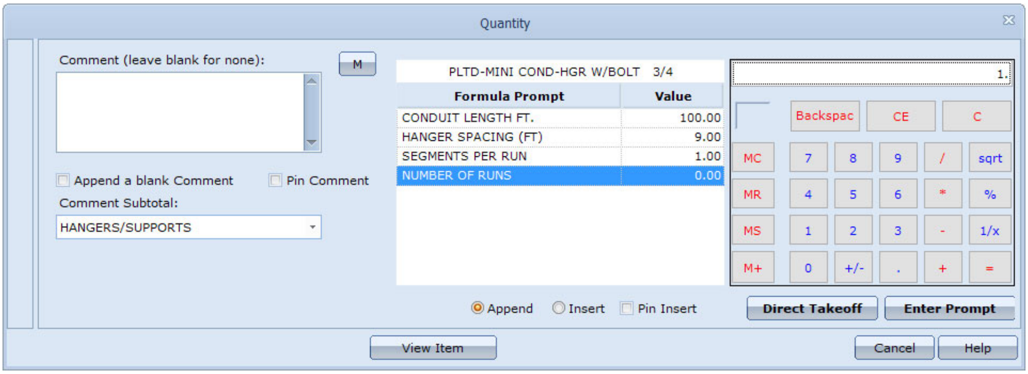
This time 3/4" was automatically selected based on the <u>Size</u> setting on the Takeoff area and went directly to the *Quantity* dialog box.

14. Enter the following values. Press **Enter** or click Enter Prompt after each entry. Refer to Figure 1-25.

- **100** for CONDUIT LENGTH (FT)
- **9** for HANGER SPACING (FT)
- **1** for SEGMENTS PER RUNS

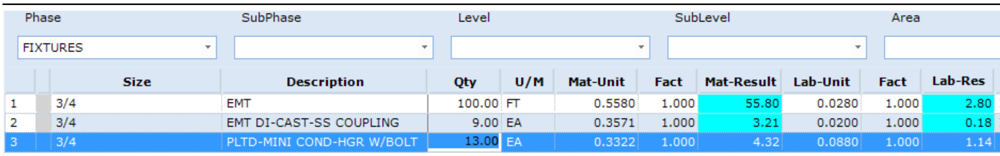
- **1** for NUMBER OF RUNS

FIGURE 1-25. Quantity dialog box



15. The Audit Trail area shows the conduit, couplings and hangers. Notice the quantity for the hangers is 11 for the 100' of wire spaced 9' apart. The calculation 100/9 yields 11.1, so IntelliBid rounds up to a whole number since you cannot have a fraction of a hanger. Refer to Figure 1-26.

FIGURE 1-26. Audit Trail - item selections



Phase: FIXTURES | SubPhase | Level | SubLevel | Area

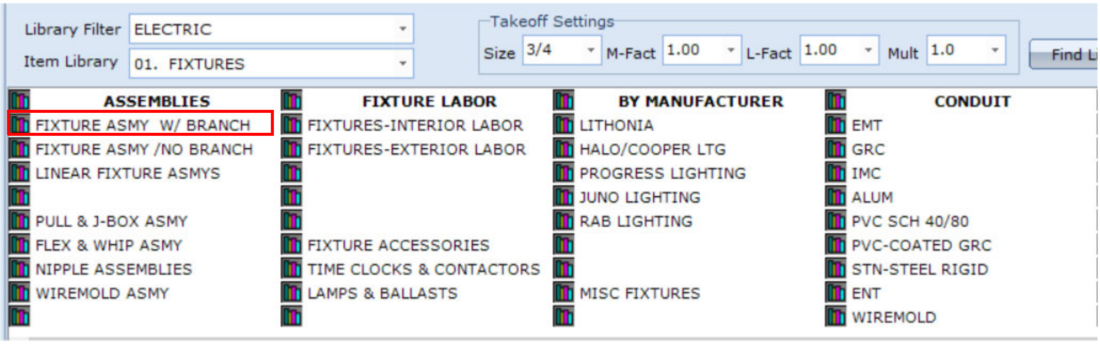
	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Res
1	3/4	EMT	100.00	FT	0.5580	1.000	55.80	0.0280	1.000	2.80
2	3/4	EMT DI-CAST-SS COUPLING	9.00	EA	0.3571	1.000	3.21	0.0200	1.000	0.18
3	3/4	PLTD-MINI COND-HGR W/BOLT	13.00	EA	0.3322	1.000	4.32	0.0880	1.000	1.14

16. Close the EMT Catalog window by clicking the x in the red box in the upper right hand corner of the window.

Take off an Assembly

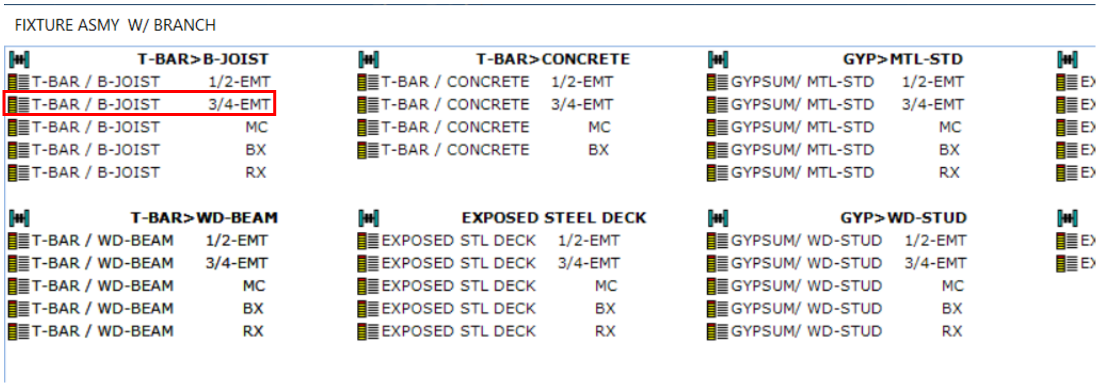
17. Each Item Library in the database has thousands of pre-built assemblies for you to choose from. These assemblies are grouped together for a particular type of assembles that have items and grouped items that offer selections at the time of take off, i.e, selecting the type of coupling to use for EMT installations. Select catalog **FIXTURE ASMY W/ BRANCH** as shown in Figure 1-27.

FIGURE 1-27. Select FIXTURE ASMY W/ BRANCH Catalog



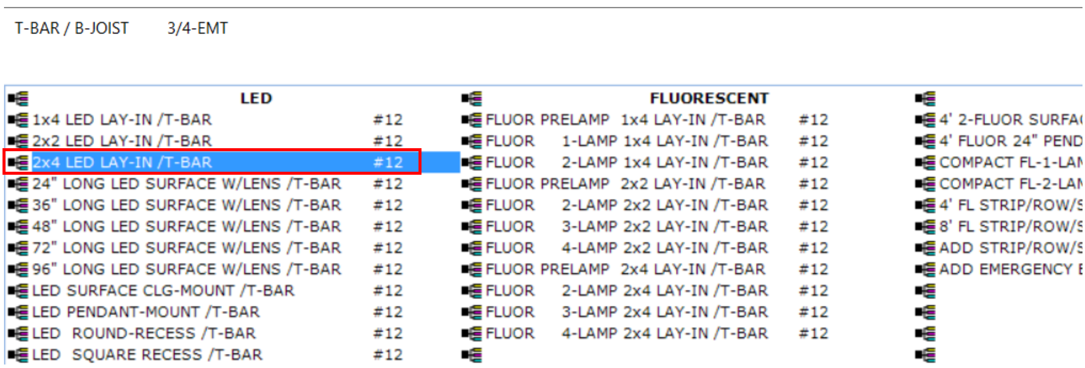
18. This will display the *FIXTURE ASMY W/BRANCH* item header/assembly list window. Select **T-BAR / B-JOIST 3/4 EMT** as shown in Figure 1-28.

FIGURE 1-28. FIXTURE ASMY W/BRANCH Assembly List Window - Select T-BAR / B-JOIST 3/4 EMT



19. This will display the *T-BAR / B-JOIST 3/4 EMT* assemblies window. Select **LED 2x4 LAY-IN /T-BAR #12** as shown in Figure 1-29.

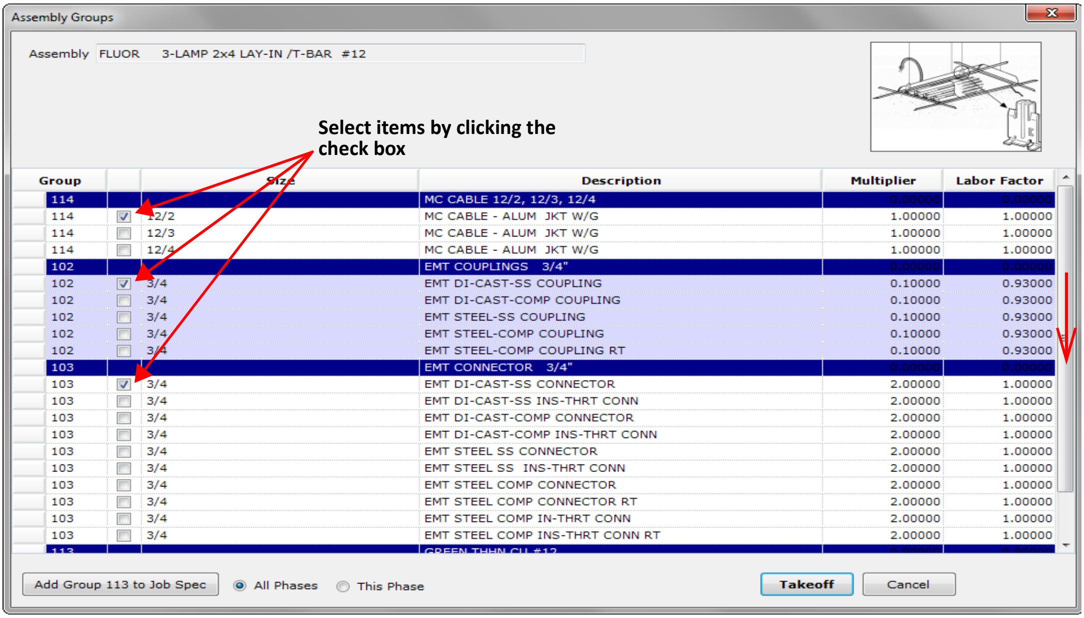
FIGURE 1-29. T-BAR / B-JOIST 3/4 EMT window - Select LED 2x4 LAY-IN /T-BAR #12



An *Assembly Group* dialog box contains *at least* one group of items. A group consists of multiple types or sizes for a particular item. This is displayed during takeoff allowing you to select the specific item eliminating the alternative of a specific assembly for each type or size.

20. This will display the *Assembly Groups* dialog box as shown in Figure 1-30. Select **DI-CAST-SS COUPLING** and **CONNECTOR** by clicking their check boxes. Scroll down to Group 113 and select **12. Green THHN CU (GRD 20A)**.

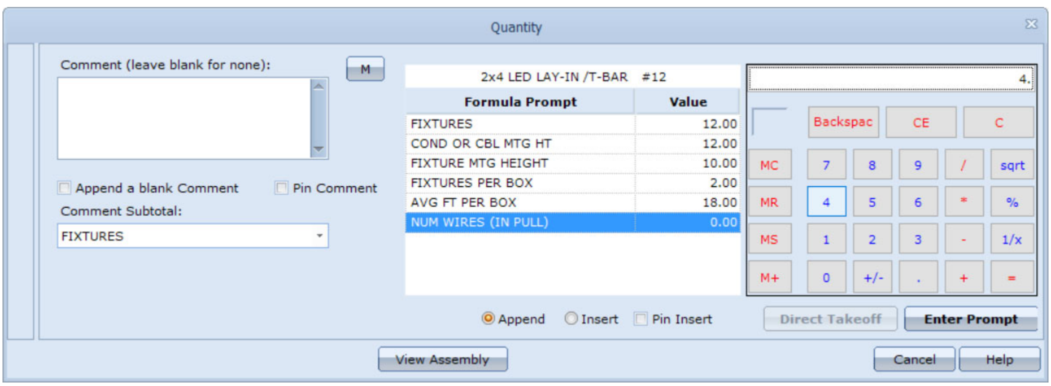
FIGURE 1-30. Assembly Groups dialog box



If you do not make a selection, that item will not be included in the takeoff. It is also possible to choose more than one item per group.

21. Click Takeoff. The *Quantity* dialog box is displayed as shown in Figure 1-31.

FIGURE 1-31. Quantity dialog box



Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **12** for FIXTURES
- **12** for COND OR CBL MTG HT
- **10** for FIXTURE MTG HEIGHT
- **2** for FIXTURES PER BOX
- **18** for AVG FT BETWEEN BOXES
- **4** for NUM WIRES (IN PULL)

22. Close the *T-BAR / B-JOIST 3/4 EMT* and *FIXTURE ASMY W/BRANCH* library windows. Scroll bar the **Audit Trail** area to the top of the list.

Assemblies are set up to add all items required, i.e. a Fluorescent fixture as shown in Figure 1-32.

FIGURE 1-32. Audit Trail - Fluorescent fixture

FIXTURES

	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Res
1	3/4	EMT	100.00	FT	0.5580	1.000	55.80	0.0280	1.000	2.80
2	3/4	EMT DI-CAST-SS COUPLING	9.00	EA	0.3571	1.000	3.21	0.0200	1.000	0.18
3	3/4	PLTD-MINI COND-HGR W/BOLT	13.00	EA	0.3322	1.000	4.32	0.0880	1.000	1.14
4	#12	2x4 LED LAY-IN /T-BAR	12.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
5	2 x 4	LED T-BAR LAY-IN FIXTURE	12.00	EA	0.0000	1.000	0.00	0.3600	1.000	4.32
6	#18 to 10	WIRE-NUT SML -YELLOW	12.00	EA	0.0857	1.000	1.03	0.0350	1.000	0.42
7	#18 TO 8	WIRE-NUT MED -RED	36.00	EA	0.1448	1.000	5.21	0.0420	1.000	1.51
8	515A	LAY-IN T-BAR CLIP UPTURNED...	24.00	EA	0.2861	1.000	6.87	0.0300	1.000	0.72
9		DROP WIRE (COLORED)	120.00	FT	0.0162	1.000	1.94	0.0100	1.000	1.20
10	1-1/2"D	4"SQ CMB-KO NO BRKT	6.00	EA	1.0371	1.000	6.22	0.1200	1.000	0.72
11		4"SQ BLANK COVER	6.00	EA	0.2893	1.000	1.74	0.0300	1.000	0.18
12	3/8 PLAIN/THREAD ROD	COMB BOX & 1/2 > 3/4" SNP-...	6.00	EA	4.0051	1.000	24.03	0.0300	1.000	0.18
13	1/4" FLANGE	HAMMER-ON FLANGE CLIP - 1/...	6.00	EA	0.8749	1.000	5.25	0.0300	1.000	0.18
14	1/4-20	WASHER NUT 1/4-20	6.00	EA	0.1466	1.000	0.88	0.0200	1.000	0.12
15	#12 SOL	8" PIGTAIL W/GRD SCREW	6.00	EA	0.9873	1.000	5.92	0.0420	1.000	0.25
16	12/2	MC CABLE - ALUM JKT W/G	60.00	FT	0.4360	1.000	26.16	0.0182	1.000	1.09
17	3/8 (38AST)	AC/MC SNAP 2-IT INSUL	24.00	EA	0.7883	1.000	18.92	0.0500	1.000	1.20
18	7"	TIE-WRAP	24.00	EA	0.1524	1.000	3.66	0.0200	1.000	0.48
19	3/4	EMT	108.00	FT	0.5580	1.000	60.26	0.0280	0.930	2.81
20	3/4	COND HAMMER-ON HGR 1/4-F...	18.00	EA	1.2428	1.000	22.37	0.0320	1.000	0.58
21	3/4	EMT DI-CAST-SS COUPLING	6.00	EA	0.3571	1.000	2.14	0.0200	0.930	0.11
22	3/4	EMT DI-CAST-SS CONNECTOR	12.00	EA	0.3505	1.000	4.21	0.0360	1.000	0.43
23	12	THHN/THWN CU (STR)	476.00	FT	0.1141	1.000	54.29	0.0042	1.000	2.00
24	12.	GREEN THHN CU (GRD 20A)	119.00	FT	0.1141	1.000	13.57	0.0042	1.000	0.50
		Phase Totals					**328.01**			**23.13**
		Job Totals					**328.01**			**23.13**

Note: You may notice differences in the Material Unit prices and Labor units for the items you have taken off. This is due to database changes that may have occurred since these pages were updated. The values on your window will be the most recent.

Let's look at the Audit Trail area. When we added the Fluorescent fixture, several items were added at the same time. The fluorescent fixture is an assembly which is a predefined group of items that belong together. You see that couplings, connectors, brackets, etc. have been added along with the fixture. This makes it easy to take items off and ensures you do not forget anything. IntelliBid has great flexibility in grouping items together in assemblies to fit any situation. Be sure to explore the Assembly Group feature later. The Item database has thousands of assemblies already defined plus you have the ability to add, delete or change existing assemblies to fit your estimating style.

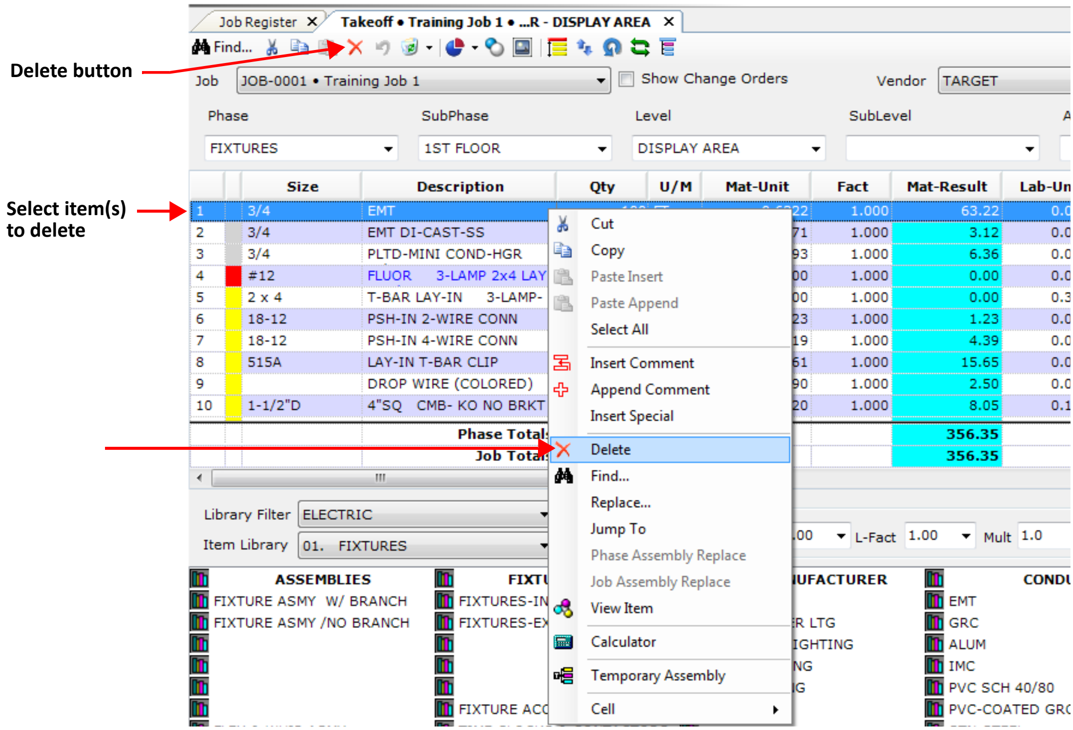
In the Audit Trail area, colors are used as identifiers. An assembly title is identified with a red block and blue text in the **Description** column. Individual assembly items have a yellow block. If you change a value in the Job Grid, it will appear in red to indicate the value has been manually changed. Blue numbers indicate the values are changed by IntelliBid. For example on Pricing Service updates; Labor Factor values on some of the takeoff materials are adjusted to reflect a change based on the National Electrical Code or as a result of using the Auto Labor setting.

Delete Items

There will be times when you need to remove items from a job.

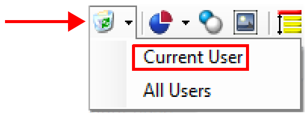
23. With the Audit Trail area displayed, select **EMT** as shown in Figure 1-33. Click the Delete button on the Toolbar or right-click and select Delete from the popup menu. Reply **Yes** to the confirm message to remove the item from the Audit Trail. You can remove more than one item by holding the CTRL key and selecting the line item or click and drag the mouse, on the Audit Trail.

FIGURE 1-33. Audit Trail - EMT delete



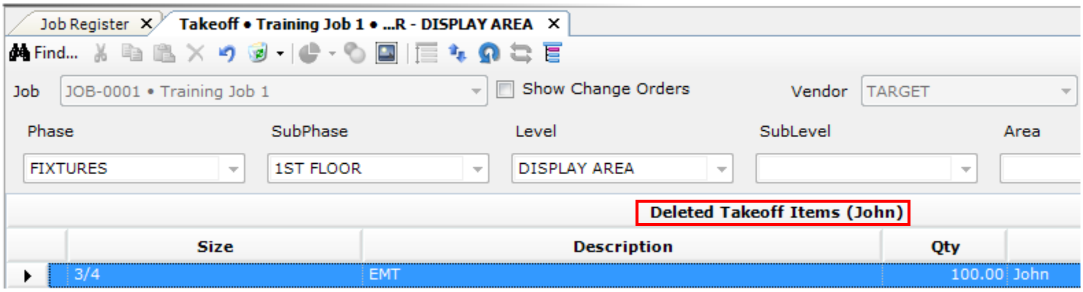
24. You can view and retrieve any items deleted from a job. Click the arrow on the Show deleted items button in the Toolbar and select Current User as shown in Figure 1-34.

FIGURE 1-34. Show deleted items button



Show deleted items - Current user lists the items you deleted from the job as shown in Figure 1-35. In a network version, **All users** shows items deleted by others as well as yourself.

FIGURE 1-35. Show deleted items - Current user

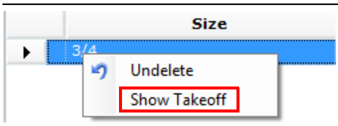


As shown above, the grid title displays your User Name in parenthesis to indicate you are looking at the items you deleted (in a multi-user environment, others working in this job can delete items). Most of the buttons on the Toolbar are disabled and the screen color is muted as a visual reminder you are not in the normal Audit Trail.

This provides you a way to track any items that may have been removed from the estimate. Items can be restored to the regular Audit Trail. Select the item(s) you want to restore. Multiple items are selected by using the Ctrl + mouse-click or Shift + mouse click to select items. Use the right-click context menu and select Undelete to restore items to the Audit Trial or click the Undelete selected items button on the Toolbar. The Audit Trail is re-displayed and the selected items have been replaced in their original position in the Audit Trail.

25. When you are not restoring an item, return to the active Audit Trail by clicking the Show deleted items button on the Toolbar again or by right-clicking any item in the Deleted Takeoff Items grid and selecting Show Takeoff as shown in Figure 1-36.

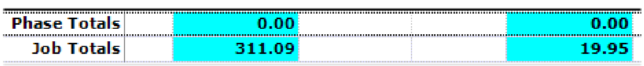
FIGURE 1-36. Show Takeoff



Job & Phase Totals

In the Takeoff tab, the last 2 rows of the Audit Trail record the Totals for Material and Labor by the current phase and for the job (comprising the total of all phases with takeoff material). This provides a job total while working on the estimate. This is just an example. Refer to Figure 1-37.

FIGURE 1-37. Phase and Job Totals



Lesson 3 — Takeoff

In this lesson we will perform a takeoff using the Takeoff window, creating a Fixture Schedule and adding items to several phases.

A Fixture Schedule is not shipped with the application since the Fixture Schedule depends on the designations the architect decides to use and these vary widely from job to job. This will show you how to set up your own Fixture Schedule.

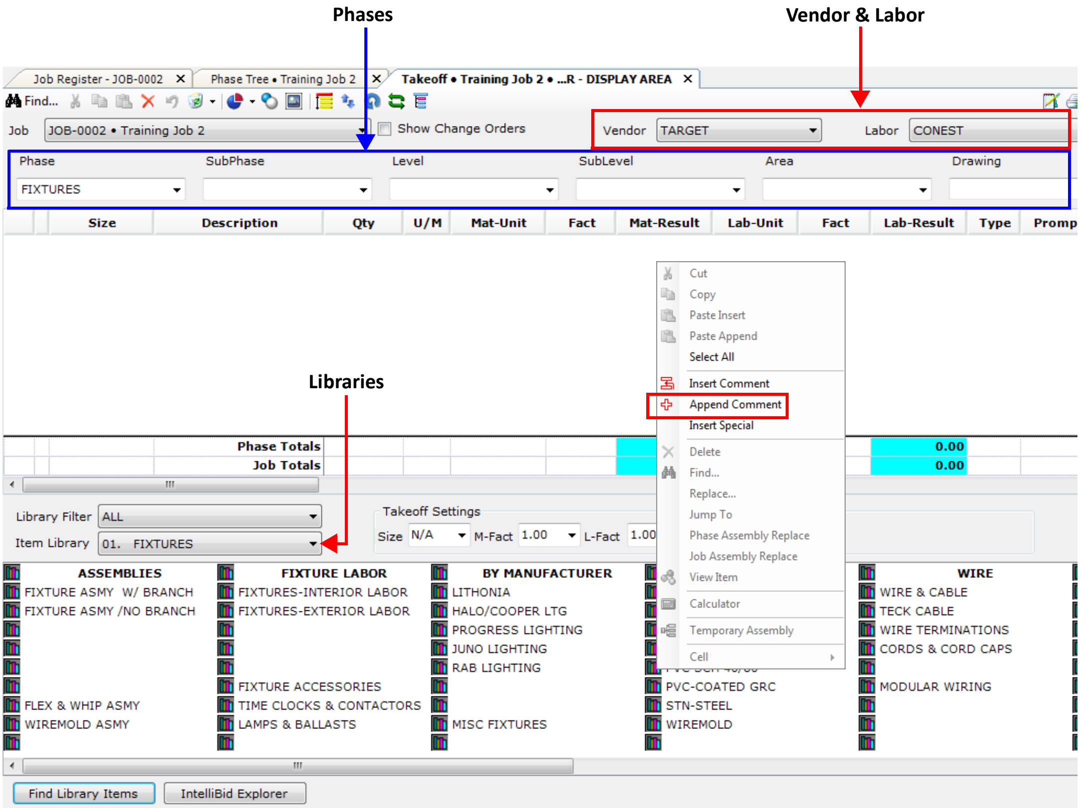
There are two different methods we will demonstrate. Comment Row Fixture Schedule and Special Item Fixture Schedule.

Comment Row Fixture Schedule

This method organizes fixtures with Comment lines. This has the advantage of automatically setting up Quote Breakdown for pricing.

1. Create a new job called **Training Job 2** in the Jobs section. Refer to Figure 1-38.
2. Open **Takeoff** to start the estimate. The phase **FIXTURES** is open as a default.

FIGURE 1-38. Takeoff tab window



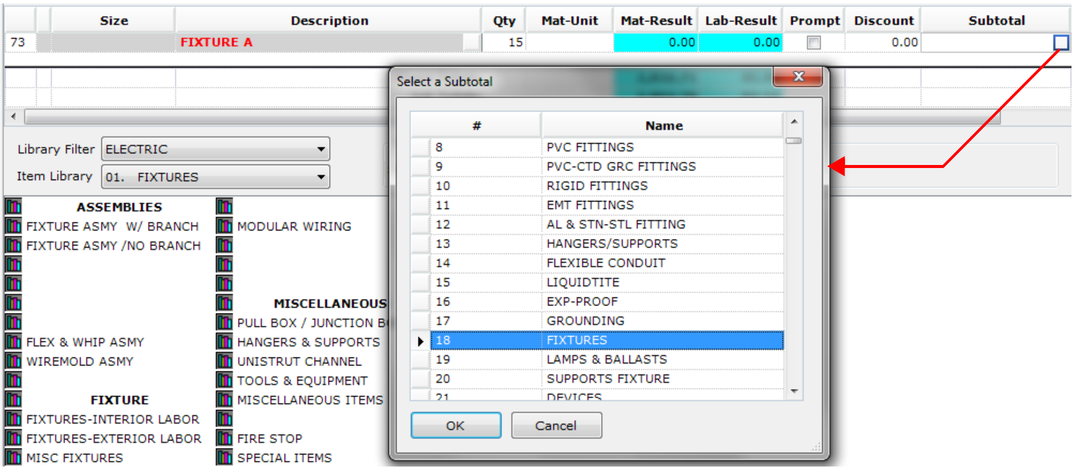
3. Right-click mouse in the Audit Trail area and select Append Comment from the popup menu as shown in Figure 1-38.

Note: Right-click popup menus keep frequently used functions at your finger tips. Try this function while working in any window for the shortcuts to functions used in that area.

4. **Append Comment** adds a line to the end of the Takeoff list. Since there are no items yet, the comment appears at the top of the grid. When Insert Comment is selected, a new line is added above the row selected. This gives you the ability to add comments lines wherever you need them. The gray background identifies this line as a comment and text is displayed in red. The cursor is positioned in the Description field ready for text entry. Type **Fixture A**. Press **Tab** to advance to the Qty field and enter **15**.

5. Scroll over until you see the column header **Subtotal**. Comments help organize the Takeoff and are important for identifying groups for Installation Reports. When Comments are assigned to a Subtotal, they appear in Quote Breakdown and Summary. To demonstrate, click the button in the Subtotal field and select FIXTURES (number 18) in the *Select a Subtotal* dialog box as shown in Figure 1-39. Click OK to assign FIXTURES to the Subtotal.

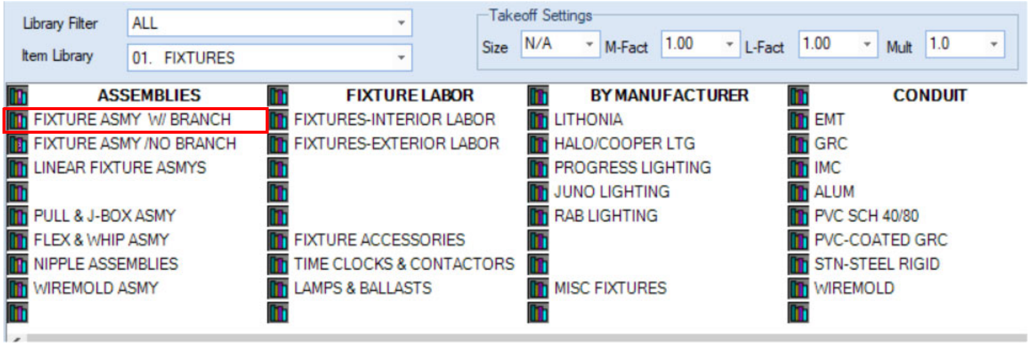
FIGURE 1-39. Select a Subtotal dialog box



The comment is just a marker, next we will add the items for this fixture.

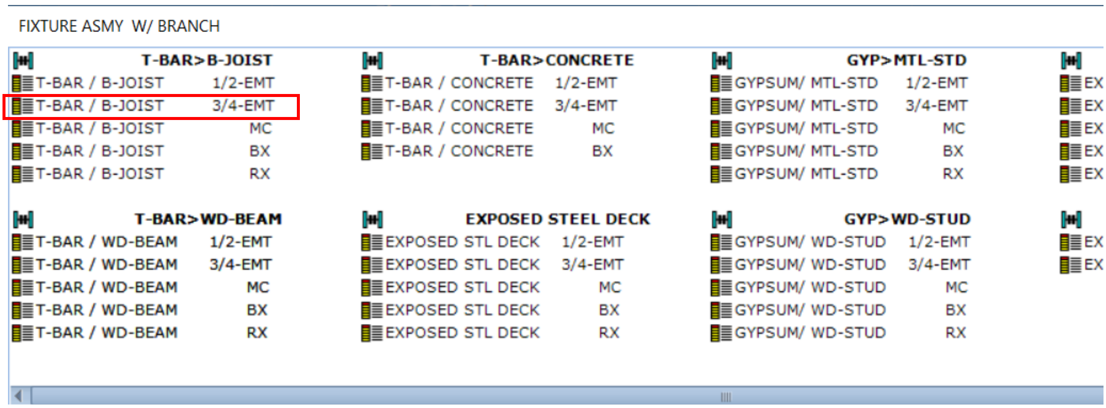
6. In the **FIXTURES** Item Library, select **FIXTURE ASMY W/BRANCH** catalog as shown in Figure 1-40.

FIGURE 1-40. FIXTURES Item Library - ASMY W/Branch catalog



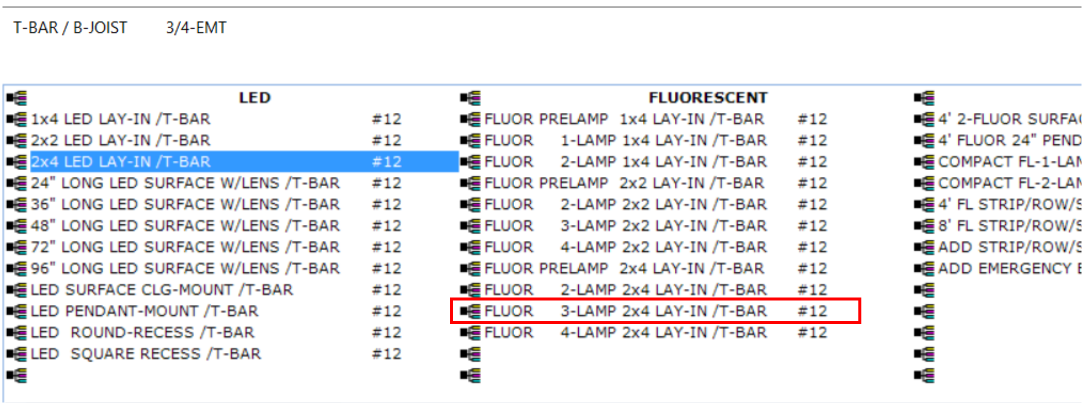
7. This displays the *FIXTURE ASMY W/BRANCH* item header/assembly list window as shown in Figure 1-41. Select **T-BAR / B-JOIST 3/4 EMT** assembly list.

FIGURE 1-41. FIXTURE ASMY W/BRANCH assembly list window



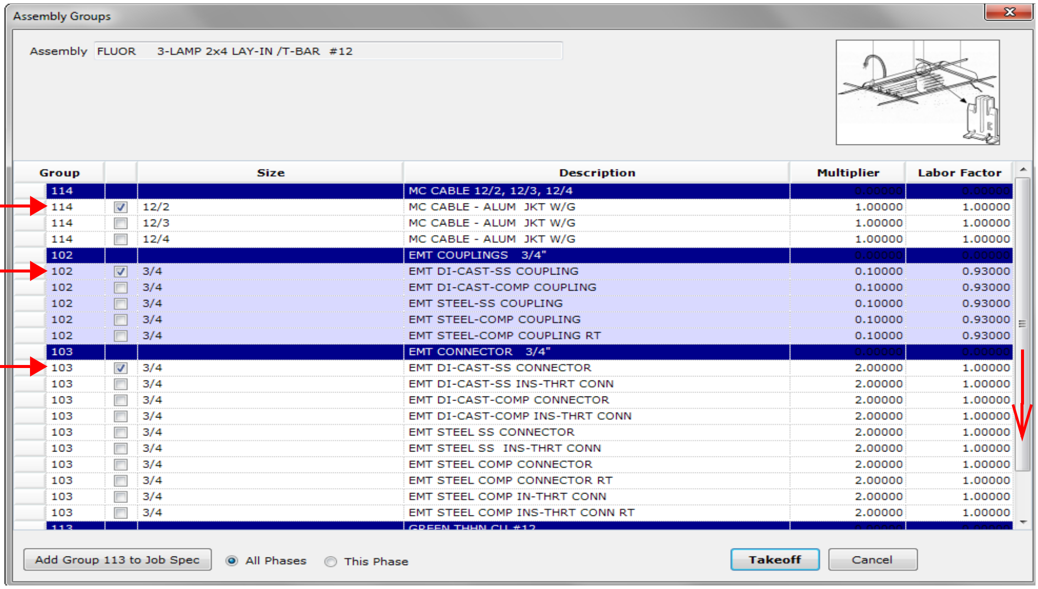
8. This displays the *T-BAR / B-JOIST 3/4-EMT* assembly window as shown in Figure 1-42. Select **FLUOR 3-LAMP 2X4 LAY-IN/T-BAR #12**.

FIGURE 1-42. T-BAR / B-JOIST 3/4-EMT assembly window



9. This displays the *Assembly Groups* dialog box as shown in Figure 1-43. Assembly Groups extends the flexibility of an assembly by offering additional components to select for the assembly.

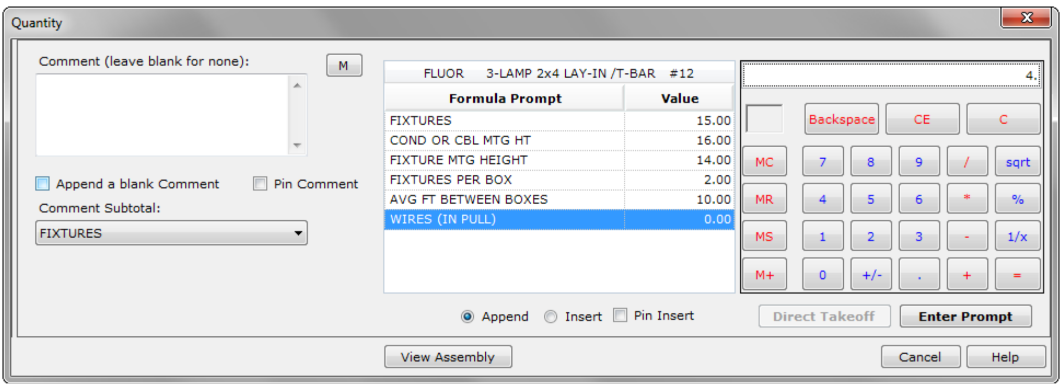
FIGURE 1-43. Assembly Groups dialog box



10. Select **EMT DI-CAST-SS COUPLING** and **EMT DI-CAST-SS CONNECTOR** by clicking their check boxes. Scroll down to Group 113 and select **12. Green THHN CU (GRD 20A)**.

11. Click Takeoff. The *Quantity* dialog box is displayed as shown in Figure 1-44.

FIGURE 1-44. Quantity dialog box



12. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **15** for FIXTURES
- **16** for COND OR CBL MTG HT
- **14** for FIXTURE MTG HEIGHT

- **2** for FIXTURES PER BOX
- **10** for AVG FT BETWEEN BOXES
- **4** for WIRES (IN PULL)

After the last Enter Prompt, the *Quantity* dialog box closes and the items that make up the assembly are added to the Audit Trail.

13. Close *T-BAR / B-JOIST 3/4 EMT* and *FIXTURE ASMY W/BRANCH* windows and scroll to the top of the Audit Trail as shown in Figure 1-45.

FIGURE 1-45. Audit Trail - Fixture takeoff

FIXTURES

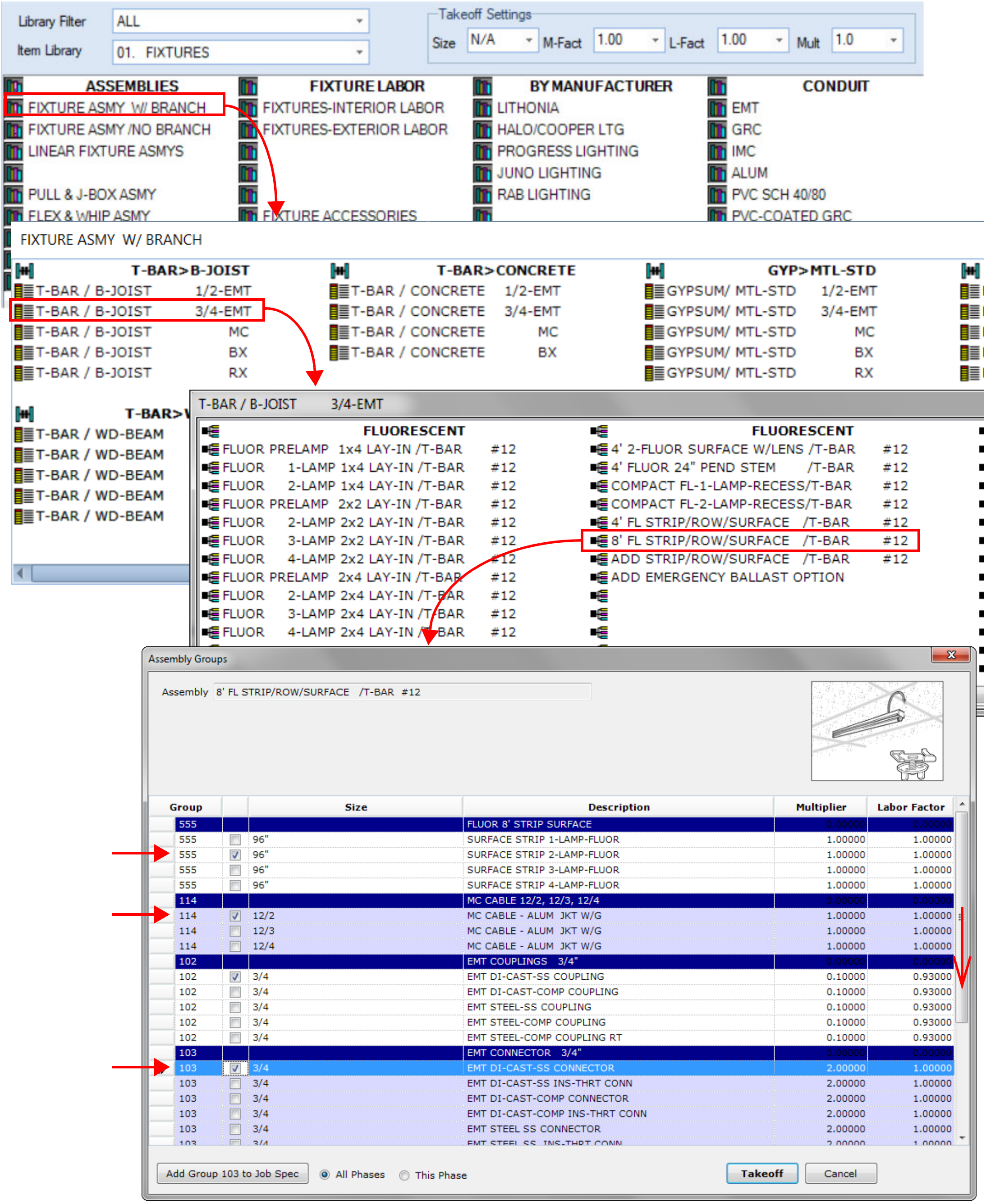
	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Res
2	#12	FLUOR 3-LAMP 2x4 LAY-IN...	15.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
3	2 x 4	T-BAR LAY-IN 3-LAMP-FLUOR	15.00	EA	0.0000	1.000	0.00	0.3400	1.000	5.10
4	#18 to 10	WIRE-NUT SML -YELLOW	15.00	EA	0.0857	1.000	1.29	0.0350	1.000	0.52
5	#18 TO 8	WIRE-NUT MED -RED	45.00	EA	0.1448	1.000	6.52	0.0420	1.000	1.89
6	515A	LAY-IN T-BAR CLIP UPTURNED...	60.00	EA	0.2861	1.000	17.17	0.0300	1.000	1.80
7		DROP WIRE (COLORED)	150.00	FT	0.0162	1.000	2.43	0.0100	1.000	1.50
8	1-1/2"D	4"SQ CMB-KO NO BRKT	8.00	EA	1.0371	1.000	8.30	0.1200	1.000	0.96
9		4"SQ BLANK COVER	8.00	EA	0.2893	1.000	2.31	0.0300	1.000	0.24
10	3/8 PLAIN/THREAD ROD	COMB BOX & 1/2 > 3/4" SNP-...	8.00	EA	4.0051	1.000	32.04	0.0300	1.000	0.24
11	1/4" FLANGE	HAMMER-ON FLANGE CLIP - 1/...	8.00	EA	0.8749	1.000	7.00	0.0300	1.000	0.24
12	1/4-20	WASHER NUT 1/4-20	8.00	EA	0.1466	1.000	1.17	0.0200	1.000	0.16
13	#12 SOL	8" PIGTAIL W/GRD SCREW	8.00	EA	0.9873	1.000	7.90	0.0420	1.000	0.34
14	12/2	MC CABLE - ALUM JKT W/G	75.00	FT	0.4360	1.000	32.70	0.0182	1.000	1.36
15	3/8 (38AST)	AC/MC SNAP 2-IT INSUL	30.00	EA	0.7883	1.000	23.65	0.0500	1.000	1.50
16	7"	TIE-WRAP	30.00	EA	0.1524	1.000	4.57	0.0200	1.000	0.60
17	3/4	EMT	75.00	FT	0.5580	1.000	41.85	0.0280	0.930	1.95
18	3/4	COND HAMMER-ON HGR 1/4-F...	16.00	EA	1.2428	1.000	19.88	0.0320	1.000	0.51
19	3/4	EMT DI-CAST-SS CONNECTOR	16.00	EA	0.3505	1.000	5.61	0.0360	1.000	0.58
20	12	THHN/THWN CU (STR)	330.00	FT	0.1141	1.000	37.64	0.0042	1.000	1.39
21	12.	GREEN THHN CU (GRD 20A)	83.00	FT	0.1141	1.000	9.47	0.0042	1.000	0.35
		Phase Totals					**261.49**			**21.23**
		Job Totals					**261.49**			**21.23**

Note: To expand the Audit Trail area, click the Resize grid button on the Toolbar. Remember to click Resize grid again to display the Library section.

We'll continue by adding **Fixture B**. Instead of adding the Comment first, we will add the Comment in the *Quantity* dialog box.

14. In the **FIXTURES** library window, select **FIXTURE ASMY W/BRANCH > T-BAR / B-JOIST 3/4-EMT > 8' FL STRIP/ROW /SURFACE /T-BAR #12**. In the *Assembly Groups* dialog box select lamp, cable, Di-cast SS couplings, connectors and scroll down to select wire. Click Takeoff. Refer to Figure 1-46.

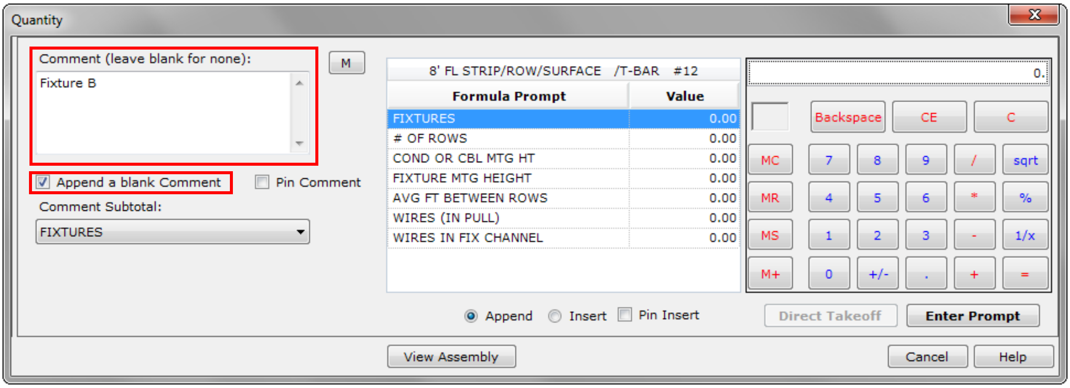
FIGURE 1-46. FIXTURES - 8’ Fluorescent Assembly Takeoff list



15. The *Quantity* dialog box is displayed as shown in Figure 1-47. The Comment text box inserts a comment row with the fixture quantity field already filled in. The subtotal is set to the default for the Library, FIXTURES. However, you can change the subtotal as necessary. Click in the

Comment text box and type **Fixture B** and check the Append a blank Comment to place an ending comment row after the assembly items.

FIGURE 1-47. Quantity dialog box - Comment text box



16. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **10** for FIXTURES
- **2** for # OF ROWS
- **16** for COND OR CBL MTG HT
- **14** for FIXTURE MTG HEIGHT
- **6** for AVG FT BETWEEN ROWS
- **3** for WIRES (IN PULL)
- **3** for WIRES IN FIX CHANNEL

17. After the last Enter Prompt, the *Quantity* dialog box closes and the items that make up the assembly are added to the Audit Trail as shown in Figure 1-48. Close the library windows.

FIGURE 1-48. Audit Trail - Fixture B

22		FIXTURE B	10.00							
23	#12	8' FL STRIP/ROW/SURFACE /...	10.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
24	96"	SURFACE STRIP 2-LAMP-FLUOR	10.00	EA	0.0000	1.000	0.00	0.5800	1.000	5.80
25	18-10	SELF STRIP/CONNECTOR -BR...	30.00	EA	0.4400	1.000	13.20	0.0150	1.000	0.45
26	1/4-20 x 5/8" STUD	T-BAR/ INDEPENDENT SUPT H...	12.00	EA	1.1363	1.000	13.64	0.0800	1.000	0.96
27		DROP WIRE (COLORED)	60.00	FT	0.0162	1.000	0.97	0.0100	1.000	0.60
28	1-1/2"D	4"SQ CMB-KO NO BRKT	2.00	EA	1.0371	1.000	2.07	0.1200	1.000	0.24
29		4"SQ BLANK COVER	2.00	EA	0.2893	1.000	0.58	0.0300	1.000	0.06
30	1/4" FLANGE	HAMMER-ON FLANGE CLIP - 1/...	2.00	EA	0.8749	1.000	1.75	0.0300	1.000	0.06
31	1/4-20	WASHER NUT 1/4-20	2.00	EA	0.1466	1.000	0.29	0.0200	1.000	0.04
32	#12 SOL	8" PIGTAIL W/GRD SCREW	2.00	EA	0.9873	1.000	1.97	0.0420	1.000	0.08
33	#18 to 10	WIRE-NUT SML -YELLOW	2.00	EA	0.0857	1.000	0.17	0.0350	1.000	0.07
34	#18 TO 8	WIRE-NUT MED -RED	4.00	EA	0.1448	1.000	0.58	0.0420	1.000	0.17
35	12/2	MC CABLE - ALUM JKT W/G	14.00	FT	0.4360	1.000	6.10	0.0182	1.000	0.25
36	3/8 (38AST)	AC/MC SNAP 2-IT INSUL	4.00	EA	0.7883	1.000	3.15	0.0500	1.000	0.20
37	7"	TIE-WRAP	4.00	EA	0.1524	1.000	0.61	0.0200	1.000	0.08
38	3/4	EMT	6.00	FT	0.5580	1.000	3.35	0.0280	0.930	0.16
39	3/4	COND HAMMER-ON HGR 1/4-F...	2.00	EA	1.2428	1.000	2.49	0.0320	1.000	0.06
40	3/4	EMT DI-CAST-SS COUPLING	1.00	EA	0.3571	1.000	0.36	0.0200	0.930	0.02
41	3/4	EMT DI-CAST-SS CONNECTOR	4.00	EA	0.3505	1.000	1.40	0.0360	1.000	0.14
42	12	THHN/THWN CU (STR)	258.00	FT	0.1141	1.000	29.43	0.0042	1.000	1.08
43	12.	GREEN THHN CU (GRD 20A)	86.00	FT	0.1141	1.000	9.81	0.0042	1.000	0.36
44			0.00							

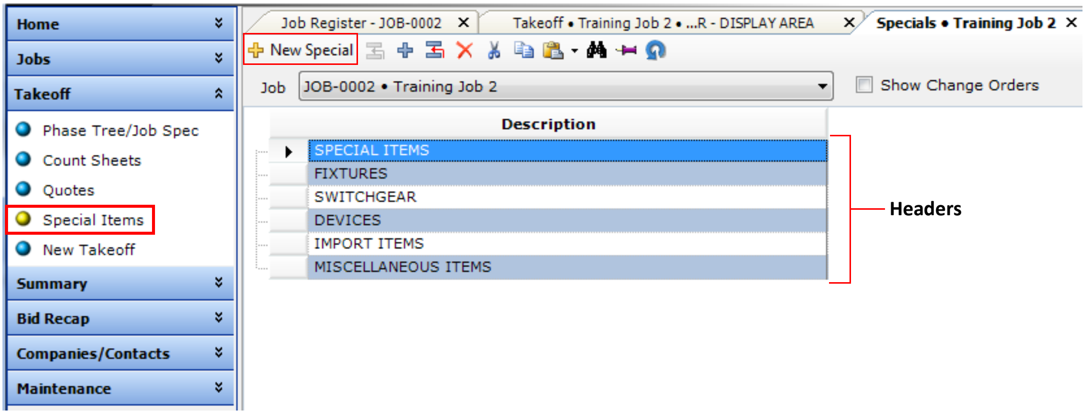
18. Notice the Comment row has the quantity assigned. The Material Price for the lamp is 0.00. As a quoted item, you will enter the price when you receive that information.

Special Item Fixture Schedule

This method uses the **Special Items** selection to create the fixtures. Special Items are those items not found in the Item Database. When you decide to make Special Items permanent, they can be imported into the Item Database by selecting Maintenance > Items.

1. Select **Takeoff** and click Special Items. A *Description* window is displayed as shown in Figure 1-49.

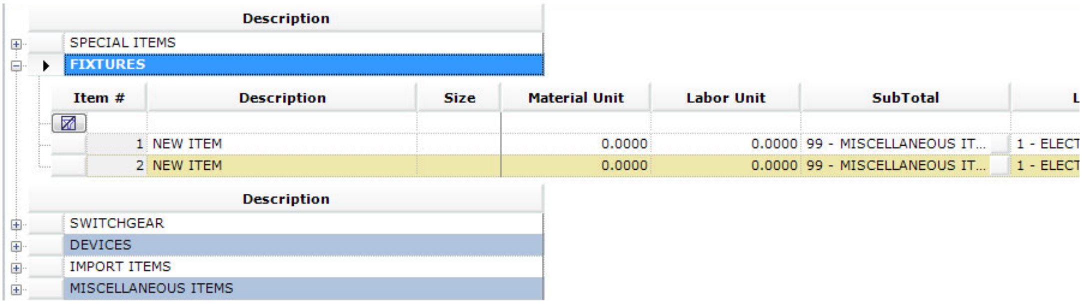
FIGURE 1-49. Description window



2. The rows are referred to as Headers, as shown in Figure 1-49. This is a way of organizing Special Items. We will add the fixtures as items under the FIXTURES Header. Select the FIXTURES header.

3. Click the New Special button on the Toolbar (or right-click on FIXTURES and select Append Item from the popup menu). This adds a row under the Header (FIXTURES) with the description NEW ITEM. Click New Special button again to add a second fixture as shown in Figure 1-50.

FIGURE 1-50. New Special button - Add 2 NEW ITEMS



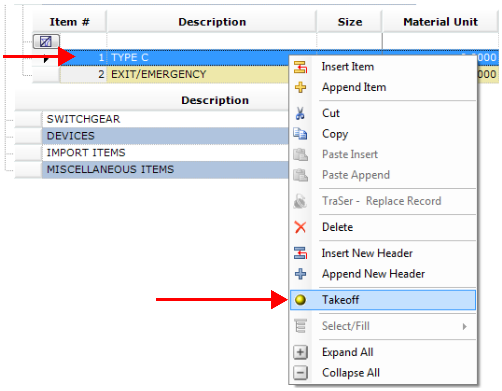
4. Highlight the first NEW ITEM and enter **Type C** for a description. Press **Enter**. This keeps you in Edit mode and moves the cursor to the next line.

5. Enter **Exit/Emergency** for a Description of the second NEW ITEM. These entries are just designations so leave the Material and Labor costs at 0.00. We will also leave Subtotal and

Labor Class at the default values. When **Prompt** is checked, the item will be listed in the *Incomplete Item* dialog box in Bid Recap. Incomplete Items are any items you want to check before completing the bid. This can be useful by reminding you of quotes you are expecting or any item with a fluctuating price.

6. Highlight **Type C** row and right-click. Select Takeoff from the popup menu as shown in Figure 1-51.

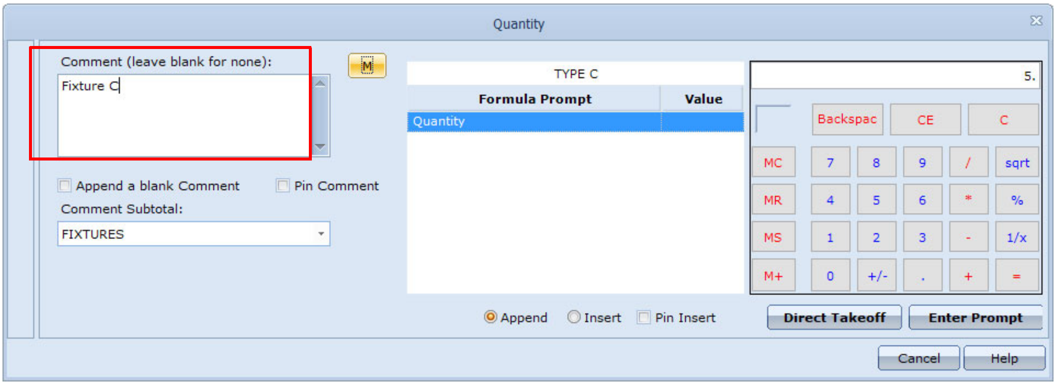
FIGURE 1-51. Special Item - Takeoff



Note: If you see a message that a Takeoff window cannot be located, it means there is no open Takeoff for this job. Click **Takeoff** in the Sidebar menu, select the job and set the phases before returning to takeoff the Special item.

7. The *Quantity* dialog box is displayed as shown in Figure 1-52. Enter **Fixture C** in the Comment box.

FIGURE 1-52. Quantity dialog box - Special Item - Fixture C



In Step 4 we entered **Fixture C** in the **Comment** text box and selected **Fixtures** for the **Comment Subtotal**.

8. Enter **5** for the quantity and click Enter Prompt. This returns you to the Audit Trail area with an entry labeled **Fixture C** and a quantity of **5** as shown in Figure 1-53.

FIGURE 1-53. Audit Trail

22		FIXTURE C	5						
23		TYPE C	5	EA	0.0000	1.000	0.00	0.0000	1.000

Now we will add items needed to install Special Item **Type C**.

9. In the FIXTURES library window select **FIXTURES ASMY W/BRANCH > T-BAR /B-JOIST MC > INCANDESCENT RD RECESS/T-BAR #12** assembly. This will display the *Assembly Groups* dialog box.

10. Select **12/2 MC CABLE - ALUM JKT W/G**. Click Takeoff. This will display the *Quantity* dialog box.

11. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **5** for FIXTURES
- **10** for 2-WIRE CBL AVG LEN

12. Close *T-BAR FIXTURES/MC B-JOIST* and *FIXTURE ASMY W/BRANCH* windows. A quantity of **5** should now appear in the comment line for **Type C** as shown in Figure 1-54.

FIGURE 1-54. Audit List / Type C

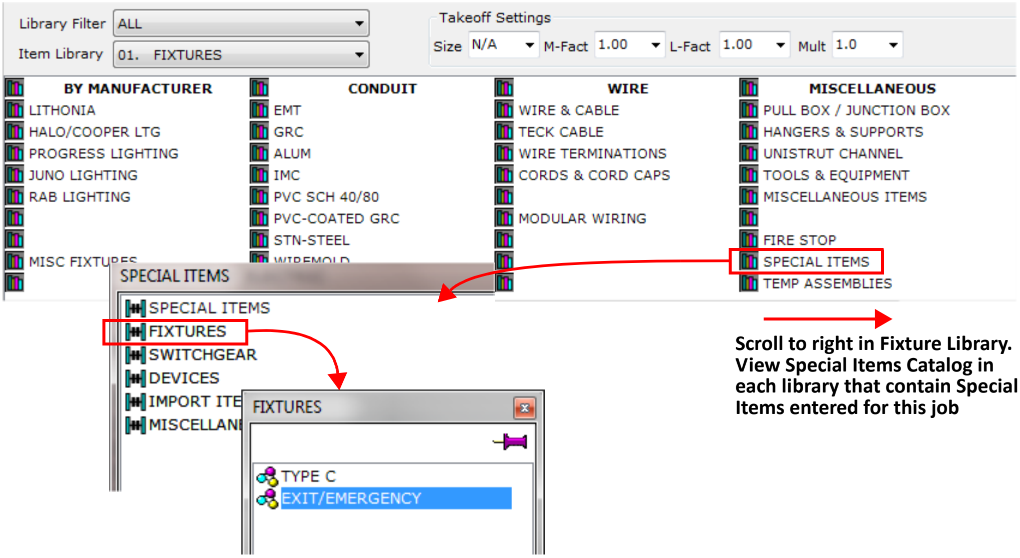
45		FIXTURE C	5.00							
46		TYPE C	5.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
47	#12 MC	INCANDESCENT RD-RECESS /...	5.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
48	150 W	RND HI-HAT PRE WIRE 1-INCA...	5.00	EA	0.0000	1.000	0.00	0.6250	1.000	3.12
49		ADJ FIXTURE T-BAR HANGER...	10.00	EA	5.4800	1.000	54.80	0.0600	1.000	0.60
50	#18 to 10	WIRE-NUT SML -YELLOW	5.00	EA	0.0857	1.000	0.43	0.0350	1.000	0.18
51	#18 TO 8	WIRE-NUT MED -RED	15.00	EA	0.1448	1.000	2.17	0.0420	1.000	0.63
52	12/2	MC CABLE - ALUM JKT W/G	50.00	FT	0.4360	1.000	21.80	0.0182	0.930	0.85
53	14>10-3 (2-CBL)	AC/MC HMR-ON BOT-MTD 1/4...	5.00	EA	1.1917	1.000	5.96	0.0320	1.000	0.16
54	7"	TIE-WRAP	10.00	EA	0.1524	1.000	1.52	0.0200	1.000	0.20
55	3/8 (38AST)	AC/MC SNAP 2-IT INSUL	1.00	EA	0.7883	1.000	0.79	0.0500	1.000	0.05
56	3/8 (383810AST)	AC/MC DX SNAP 2-IT SCR-CLP...	5.00	EA	1.8106	1.000	9.05	0.0500	1.000	0.25
		Phase Totals					**449.94**			**38.16**
		Job Totals					**449.94**			**38.16**

Special Items Catalog

There is another way to add Special Items to Takeoff. Special Items is a Catalog that appears in every library. The special items added earlier are now available to add to Takeoff the same as any other item. You can add all your Special Items in Maintenance and then add them to Takeoff from any Item Library. This is helpful when a Special Item is used in multiple phases of the job.

13. In the **FIXTURES** library, scroll to the right and select SPECIAL ITEMS. Refer to Figure 1-55.

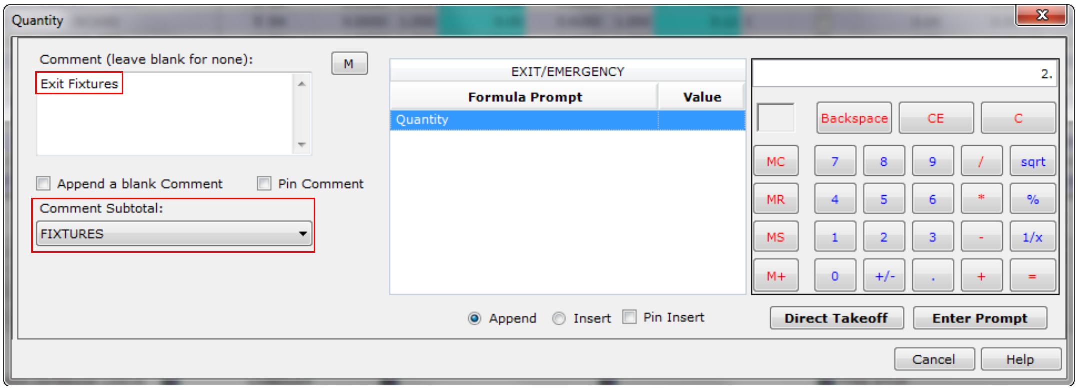
FIGURE 1-55. Special Items > Fixtures > Exit/Emergency



14. This opens the list of Special Item Headers from the Special Items tab. Click FIXTURES. There are the Special Items you just added as shown in Figure 1-55.

15. Select EXIT/EMERGENCY. This displays the *Quantity* dialog box as shown in Figure 1-56.

FIGURE 1-56. Quantity dialog box - Exit Fixtures



16. Type Exit Fixtures in the **Comment** field. In **Comment Subtotal:**, select **FIXTURES**. For Quantity, enter **2** and click Enter Prompt.

17. Close the *Special Items* window.

18. In the FIXTURES library, select **FIXTURE ASMY W/BRANCH > GYPSUM/MTL-STD MC**.

Note: You can take off multiple Special items without returning to the Special Items selection from the Takeoff window by clicking the **PIN** button on the Toolbar. With Pin set, when you have completed the quantity entry for the first special item you will return to Special Items to select the next item to take off.

19. Scroll the library window to the right until you see the header EXIT. Select **EXIT SIGN W/EMGCY -CKT GYP/MTL-STD #12 MC** assembly.

20. In the *Assembly Groups* dialog box, select **12/2 MC Cable-ALUM JKT W/G**. Click Takeoff.

21. In the *Quantity* dialog box, enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **2** for FIXTURES
- **60** for 2-WIRE CBL AVG LEN

22. The EXIT SIGN W/EMGCY-CKT assembly has been added to the takeoff as shown in Figure 1-57. Close *GYPSUM/MC MTL-STUD* and *FIXTURE ASMY W/BRANCH* windows.

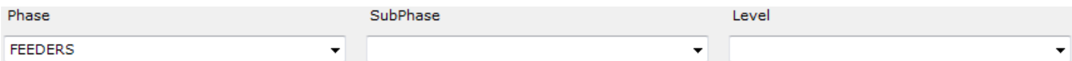
FIGURE 1-57. Exit Sign W/Emergency assembly - takeoff

57		EXIT FIXTURES	2.00							
58		EXIT/EMERGENCY	2.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
59	#12 MC	EXIT SIGN W/EMGCY-CKT /...	2.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
60		EXIT PENDANT MTD 1-FACE	2.00	EA	0.0000	1.000	0.00	1.0500	1.000	2.10
61	1-1/2"D 15.8-CI	4" OCTAGON BOX COMB KO	2.00	EA	1.1061	1.000	2.21	0.0800	1.000	0.16
62	TSGB16	STUD BRACKET ADJ 11 TO 18"...	2.00	EA	2.0203	1.000	4.04	0.0300	1.000	0.06
63	#10 x 1"	TEK SCREW	6.00	EA	0.0493	1.000	0.30	0.0170	1.000	0.10
64		GROUND SCREW	2.00	EA	0.0323	1.000	0.06	0.0300	1.000	0.06
65	#18 to 10	WIRE-NUT SML -YELLOW	2.00	EA	0.0857	1.000	0.17	0.0350	1.000	0.07
66	#18 TO 8	WIRE-NUT MED -RED	6.00	EA	0.1448	1.000	0.87	0.0420	1.000	0.25
67	12/2	MC CABLE - ALUM JKT W/G	120.00	FT	0.4360	1.000	52.32	0.0182	0.930	2.03
68	14-2>10-3 & 3/8	AC/FLEX HGR PUSH-IN MTL/W...	12.00	EA	0.4130	1.000	4.96	0.0320	1.000	0.38
69	3/8 (38AST)	AC/MC SNAP 2-IT INSUL	1.00	EA	0.7883	1.000	0.79	0.0500	1.000	0.05
70	3/8 (383810AST)	AC/MC DX SNAP 2-IT SCR-CLP...	2.00	EA	1.8106	1.000	3.62	0.0500	1.000	0.10
		Phase Totals					**519.28**			**43.53**
		Job Totals					**519.28**			**43.53**

Feeders

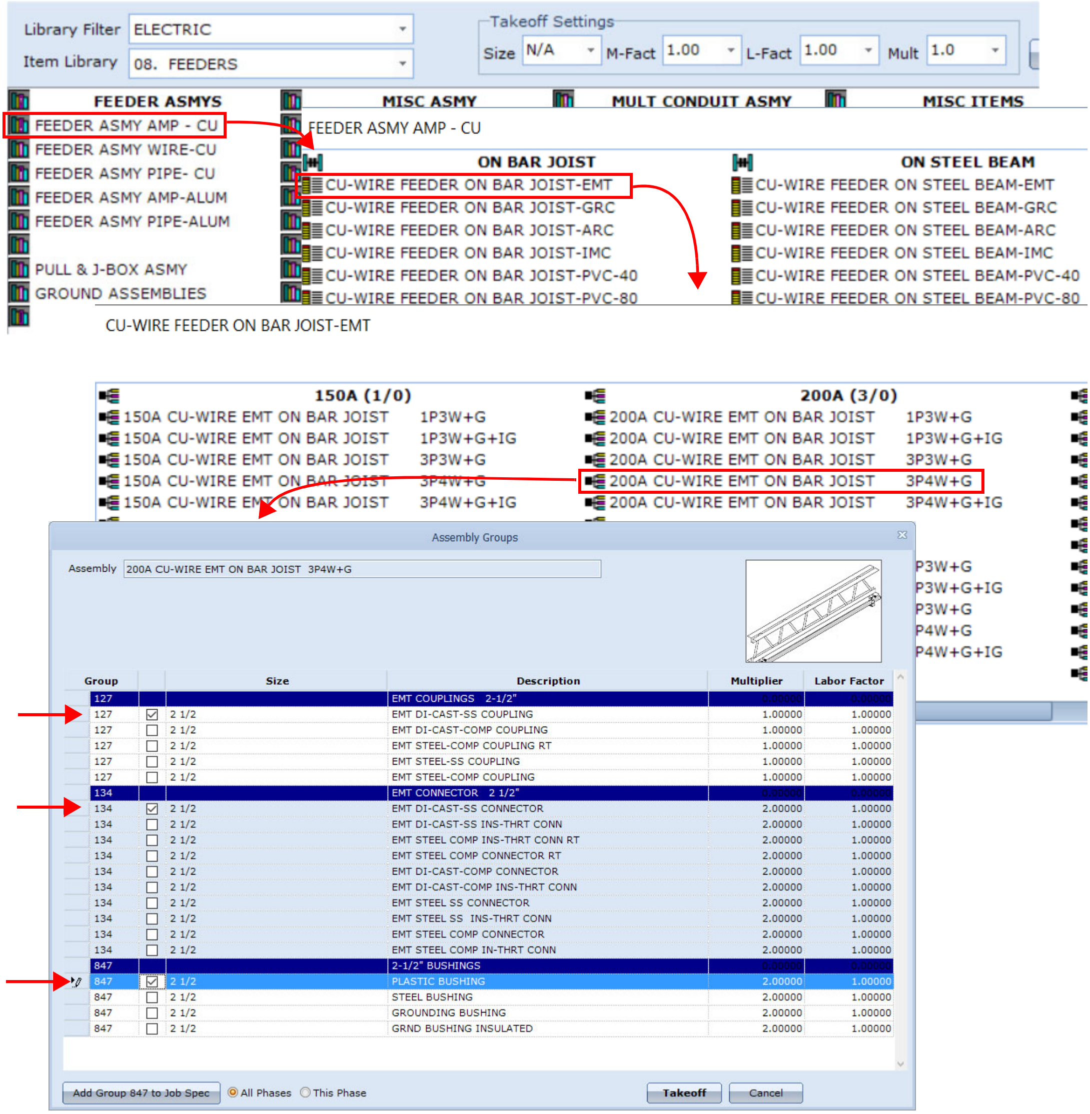
1. Click the Phase drop-down list and select FEEDERS as shown in Figure 1-58. When you change Phases, the Subphases are kept if they are present in the new phase.

FIGURE 1-58. Phase - SubPhase & Level drop-down lists



2. Select **FEEDER ASMY BY AMP - CU > CU-WIRE FEEDER ON BAR JOIST-EMT > 200A CU-WIRE EMT ON BAR-JOIST 3P4W+G** as shown in
Figure 1-59.

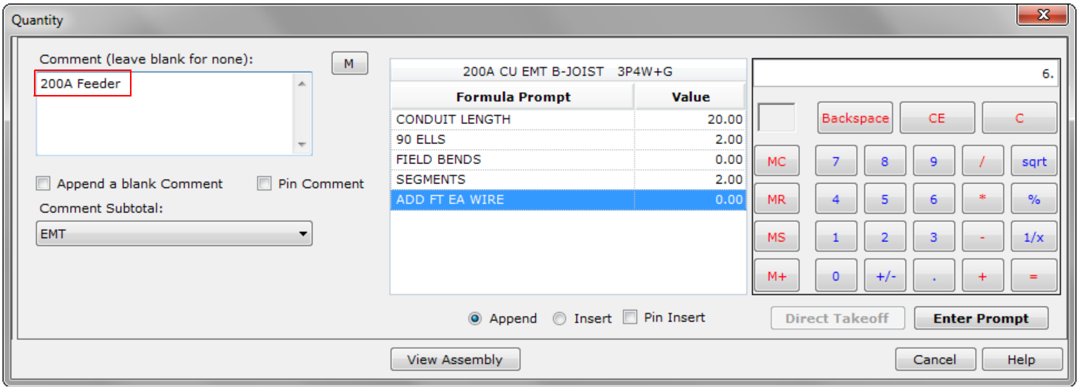
FIGURE 1-59. 200A CU EMT B-JOIST 3P3W+G assembly



3. In the *Assembly Groups* dialog box, select **EMT DI-CAST-SS COUPLING, EMT DI-CAST-SS CONNECTOR** and the **PLASTIC BUSHING**. Click Takeoff.

4. This displays the *Quantity* dialog box as shown in Figure 1-60.

FIGURE 1-60. Quantity dialog box



5. Type <u>200A Feeder</u> in the **Comment** field.

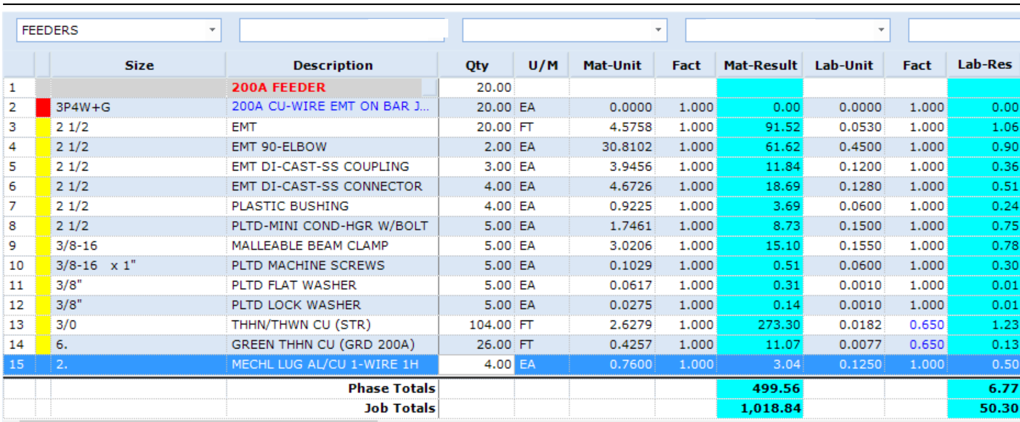
6. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **20** for CONDUIT LENGTH
- **2** for NUM 90 ELLS
- **0** for FIELD BENDS
- **2** for NUM SEGMENTS = Lengths of conduit between boxes. Each segment will yield 2 connectors per run.
- **8** for HANGER SPACING (FT)
- **6** for ADD FT EA WIRE

Note: In the above example, if you skipped over the FIELD BENDS row, the Quantity dialog box will not close. You must enter the 0 and click **Enter Prompt** while on that prompt row.

7. That completes <u>FEEDERS</u>. Close the *200 AMP CU FEEDERS* and *FEEDER ASMY BY AMPS* windows so that you are back at the Takeoff window as shown in Figure 1-61.

FIGURE 1-61. Audit Trail - 200A Feeder



FEEDERS

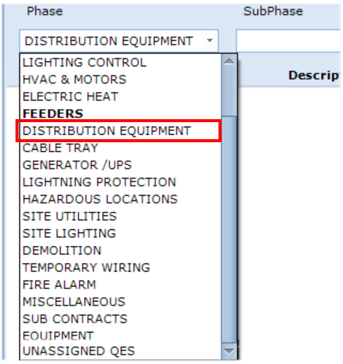
	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Res
1		200A FEEDER	20.00							
2	3P4W+G	200A CU-WIRE EMT ON BAR J...	20.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
3	2 1/2	EMT	20.00	FT	4.5758	1.000	91.52	0.0530	1.000	1.06
4	2 1/2	EMT 90-ELBOW	2.00	EA	30.8102	1.000	61.62	0.4500	1.000	0.90
5	2 1/2	EMT DI-CAST-SS COUPLING	3.00	EA	3.9456	1.000	11.84	0.1200	1.000	0.36
6	2 1/2	EMT DI-CAST-SS CONNECTOR	4.00	EA	4.6726	1.000	18.69	0.1280	1.000	0.51
7	2 1/2	PLASTIC BUSHING	4.00	EA	0.9225	1.000	3.69	0.0600	1.000	0.24
8	2 1/2	PLTD-MINI COND-HGR W/BOLT	5.00	EA	1.7461	1.000	8.73	0.1500	1.000	0.75
9	3/8-16	MALLEABLE BEAM CLAMP	5.00	EA	3.0206	1.000	15.10	0.1550	1.000	0.78
10	3/8-16 x 1"	PLTD MACHINE SCREWS	5.00	EA	0.1029	1.000	0.51	0.0600	1.000	0.30
11	3/8"	PLTD FLAT WASHER	5.00	EA	0.0617	1.000	0.31	0.0010	1.000	0.01
12	3/8"	PLTD LOCK WASHER	5.00	EA	0.0275	1.000	0.14	0.0010	1.000	0.01
13	3/0	THHN/THWN CU (STR)	104.00	FT	2.6279	1.000	273.30	0.0182	0.650	1.23
14	6.	GREEN THHN CU (GRD 200A)	26.00	FT	0.4257	1.000	11.07	0.0077	0.650	0.13
15	2.	MECHL LUG AL/CU 1-WIRE 1H	4.00	EA	0.7600	1.000	3.04	0.1250	1.000	0.50
		Phase Totals					499.56			6.77
		Job Totals					1,018.84			50.30

Change Phases in Takeoff

As you learned from the Fixture and Feeder takeoff lessons, all material you place into your estimates is placed into a phase for that job. The phase tree is assigned when the job is added to the system and can be modified and adjusted by the user to meet the needs of each job you are bidding (see Lesson 11 - Phases). Once you have the phase tree set-up to meet the needs of your job, you can move from phase to phase by using the drop-down list for Phase, SubPhase, Level, SubLevel and Area on the Takeoff window. For example, to switch from the **Feeder** Phase to the **Distribution Equipment** Phase, perform the following:

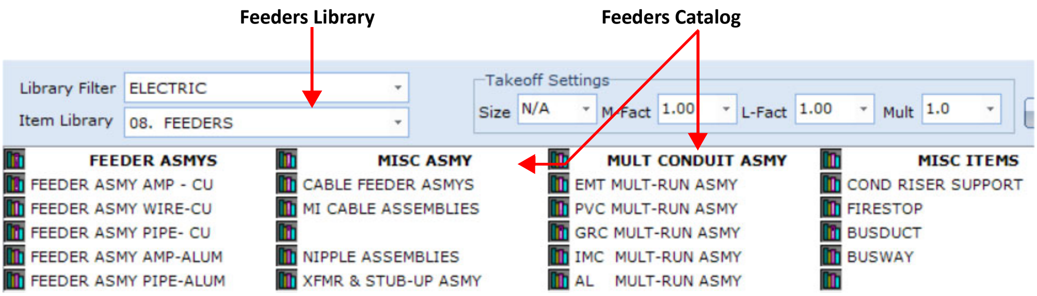
8. Click the Phase drop-down list and select DISTRIBUTION EQUIPMENT as shown in Figure 1-62.

FIGURE 1-62. Phase - Distribution Equipment



9. Click the Library drop-down list and select FEEDERS as shown in Figure 1-63.

FIGURE 1-63. Phase - Feeders



The **Audit Trail** is empty - ready for more takeoff. **Job Totals** shows you there are items assigned to other phases for this job. The **Item Library** has changed to FEEDERS with different Catalog entries. IntelliBid has assigned default libraries for each phase. These default libraries contain the items and assemblies you most likely will use for the phase; but this doesn't mean you cannot use items in other libraries. Whenever you want, click the Item Library drop-down list to select any of the other libraries. Understanding where items are located will be a learning process. You will find many items listed in more than one library-catalog. This makes finding what you need when you need it easier. There are also tools to help find specific items.

We will be looking at those in Lesson 4 "Find/Replace" on page 3-41.

Lesson 4 — Editing the Audit Trail

Ensure you're in Takeoff for Training Job 2. The items and job totals in these illustrations may not be the same as you see on your screen. What is important is that you understand the process; how to select items and add them to your takeoff, the information that is available in Takeoff and Summary and how to create a bid.

Click the Phase drop-down list and select FIXTURES. The Phases in bold text in the Phase drop-down lists have takeoff items assigned. We have items and assemblies in several phases, but we have not looked at the item information available in the Takeoff window. Use the scroll bar at the bottom of the grid to view all the fields. Many of these fields can be edited in the Audit Trail, some are only editable in Maintenance > Items and some are read-only. The blue background in the **Mat-Result** and **Lab-Result** columns highlights the calculated total, material cost and labor hours.

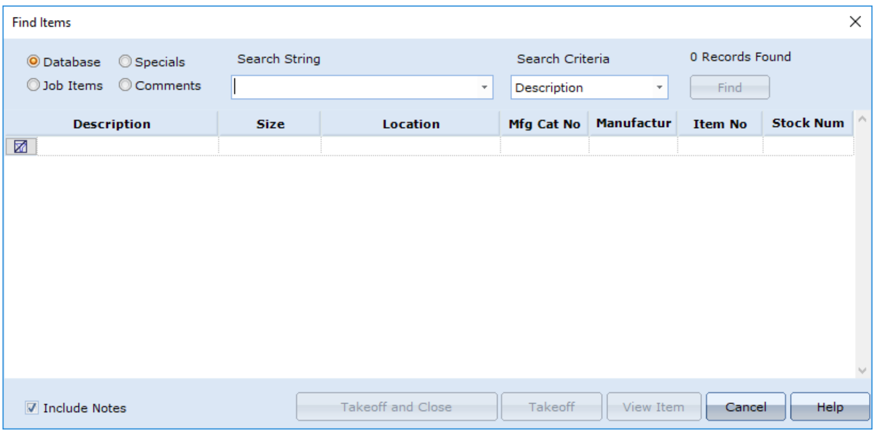
Click a cell with a value in the **Mat-Unit** column. This sets edit mode ON. The Audit Trail is designed to stay in edit mode when you use the **Enter** key which moves the cursor position down the column or **Tab** key which moves the cursor position across the row to the next field. Change the Material Unit value for an item. Any values you change will appear in red which indicates that the user changed the original value in this cell. It also draws attention to the changed values. Any items whose values are updated by the software will appear in blue.

Find/Replace

On the Takeoff tab, there are several *find* functions to help locate items, depending on what you are looking for. We will show you how to find an item and replace it.

1. Click the Find button Find... on the Toolbar. This displays the *Find Items* dialog box as shown in Figure 1-64.

FIGURE 1-64. Find Items dialog box



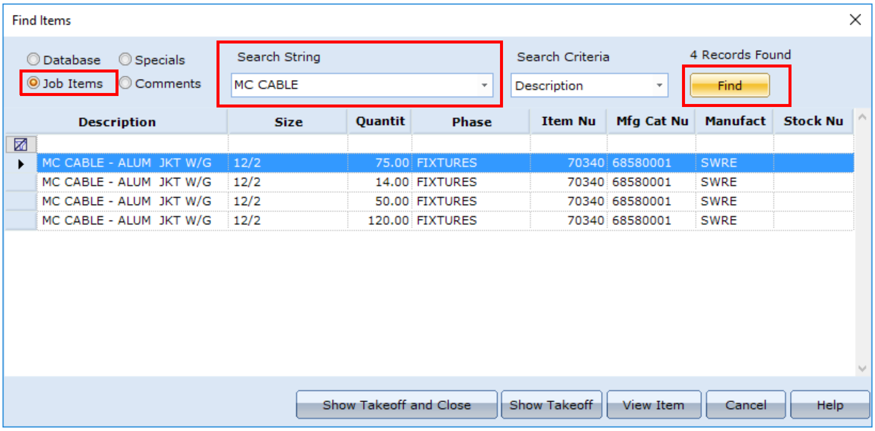
This dialog box allows you to:

- Find items in the Item database
- Find items in Special Items
- Find items in the job takeoff, across all phases
- Find Comments

Items located in **Items Database** or **Specials** can be taken off from the *Find Items* dialog box. You may also use this feature to find items in the job takeoff that you want to replace with a different item.

2. Select Job Items and in **Search String**, type **MC CABLE** as shown in Figure 1-65. Click Find.

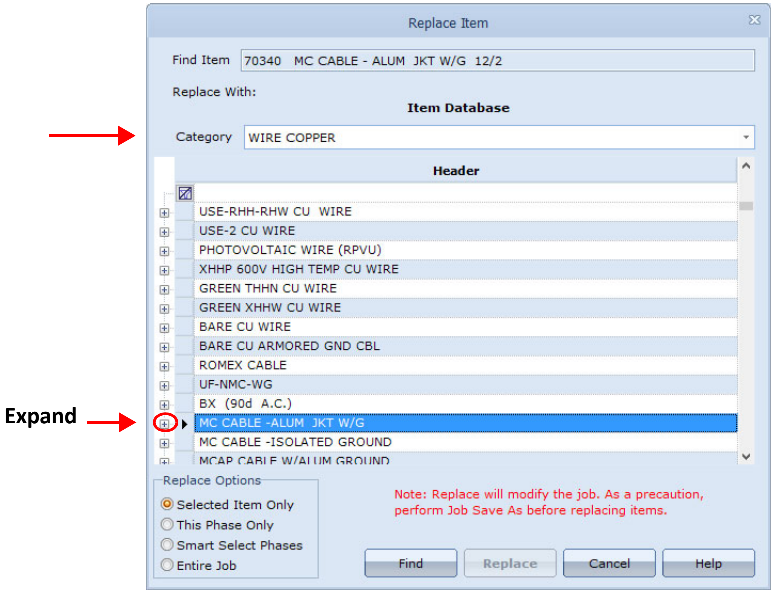
FIGURE 1-65. Find MC CABLE



The *Find Items* dialog box displays the MC CABLE items in the job, including the Phase they are in.

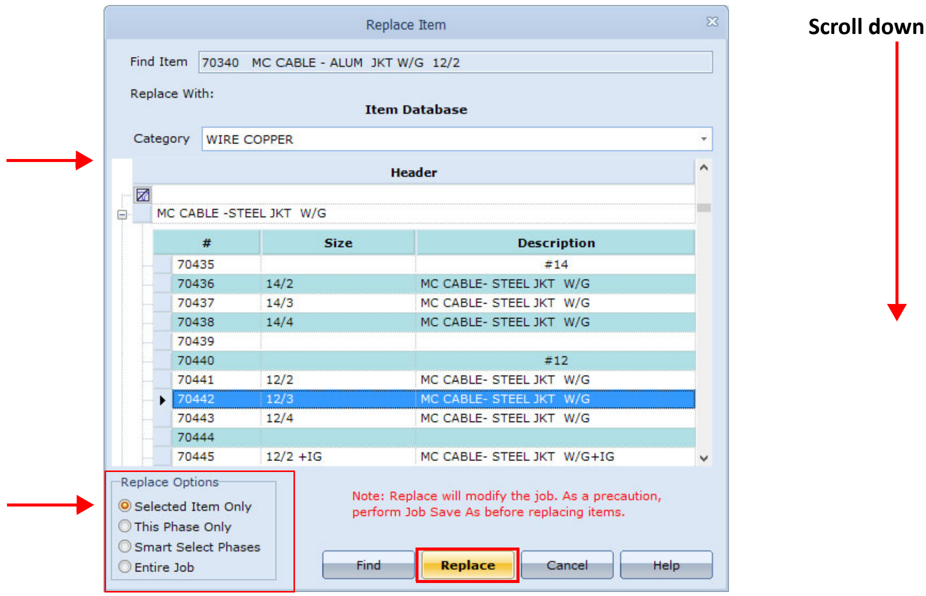
3. Click Show Takeoff. MC CABLE in the *Find Items* dialog box is highlighted in the Audit Trail for each occurrence. Clicking Show Takeoff again will show the item in the appropriate Phase on the Audit Trail in the background. Click **Show Takeoff** and **Close** and you will be on the item in the Audit Trail. In the Audit Trail area, right-click the highlighted item and select Replace. This displays the *Replace Item* dialog box as shown in Figure 1-66, with the appropriate item category.

FIGURE 1-66. Replace Item dialog box



4. You can select any of the other Category by using the **Category** drop-down list. The contents of the dialog box is positioned at the beginning of the Catalog. Replace the 12/2 MC CABLE in the Audit Trail by clicking the + to expand the MC CABLE ALUM JKT/W/G section, scroll down the list and highlight the 12/3 cable. The Replace button becomes enabled. Refer to Figure 1-67.

FIGURE 1-67. Replace Item dialog box - MC CABLE

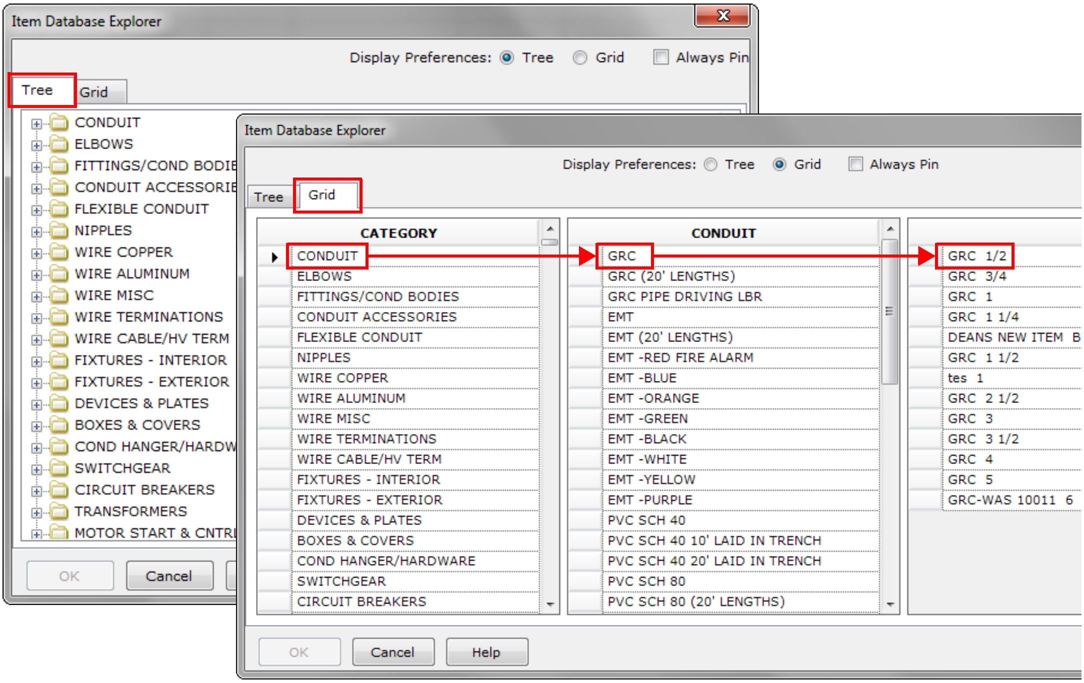


5. **Replace Options** determines how the replace will be performed. See Figure 1-67. This is helpful when you need to change an item for more than just one instance in the Audit Trail. For now leave the selection on **Selected Item Only** and click Replace. The 12/3 cable is now listed in the Takeoff. Close the *Find Items* dialog box by clicking Cancel.

Database Explorer

1. Click the IntelliBid Explorer button at the bottom of the Takeoff window. The *Item Database Explorer* dialog box is displayed as shown in Figure 1-68.

FIGURE 1-68. Item Database Explorer - Tree & Grid



2. The item database is shown in Tree or Grid format. Find items by expanding the tree. In the grid view, click an entry in the Category list. The corresponding columns display all items associated with the category selection. In Figure 1-68, click Conduit and select GRC to display all GRC items.

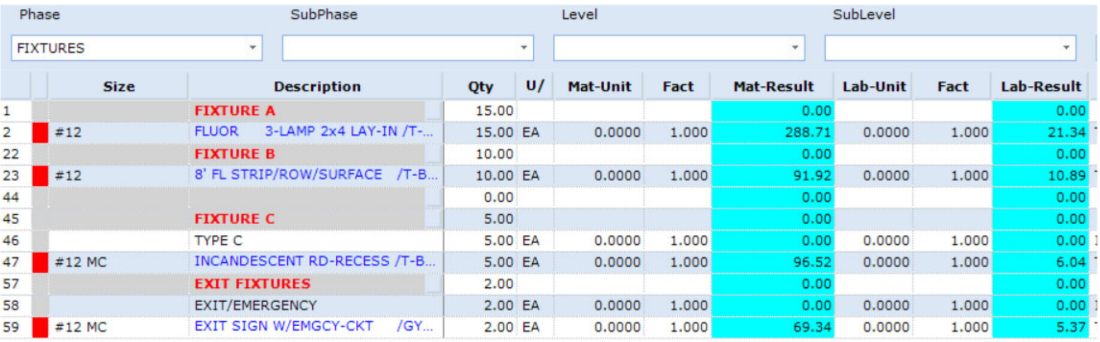
3. Double-click the item or click the OK button to launch the *Quantity* dialog box, enter a quantity and add the item to your takeoff. After entering a quantity, Internet Explorer closes. Select the Tree and click the + by CONDUIT, click the + by GRC and double-click GRC 1/2 to take it off.

Collapse/Expand Assemblies

You can change the look of the list in Takeoff to show the assembly titles only and hide the items that make up the assembly.

1. With Phases set to **FIXTURES**, click the Collapse/Expand Assemblies button on the Toolbar. The Comments and Assembly Title lines are shown and all individual items within the assemblies are hidden. Refer to Figure 1-69.

FIGURE 1-69. Collapse/Expand Assemblies



Phase: FIXTURES | SubPhase: | Level: | SubLevel:

	Size	Description	Qty	U/	Mat-Unit	Fact	Mat-Result	Lab-Unit	Fact	Lab-Result
1		FIXTURE A	15.00				0.00			0.00
2	#12	FLUOR 3-LAMP 2x4 LAY-IN /T-...	15.00	EA	0.0000	1.000	288.71	0.0000	1.000	21.34
22		FIXTURE B	10.00				0.00			0.00
23	#12	8' FL STRIP/ROW/SURFACE /T-B...	10.00	EA	0.0000	1.000	91.92	0.0000	1.000	10.89
44			0.00				0.00			0.00
45		FIXTURE C	5.00				0.00			0.00
46		TYPE C	5.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
47	#12 MC	INCANDESCENT RD-RECESS /T-B...	5.00	EA	0.0000	1.000	96.52	0.0000	1.000	6.04
57		EXIT FIXTURES	2.00				0.00			0.00
58		EXIT/EMERGENCY	2.00	EA	0.0000	1.000	0.00	0.0000	1.000	0.00
59	#12 MC	EXIT SIGN W/EMGCY-CKT /GY...	2.00	EA	0.0000	1.000	69.34	0.0000	1.000	5.37

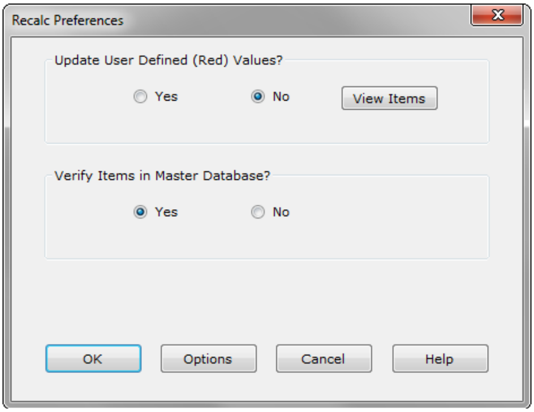
2. Click the Collapse/Expand Assemblies button to display all the items again.

Recalculate Takeoff

As you work in Takeoff, you will add, edit and delete items. To ensure the totals are accurate, there is a function to recalculate the complete takeoff. When Recalc is performed, you have options you can specify for the calculation.

1. Click the Recalc button on the Toolbar. The *Recalc Preferences* dialog box is displayed as shown in Figure 1-70.

FIGURE 1-70. Recalc Preferences dialog box

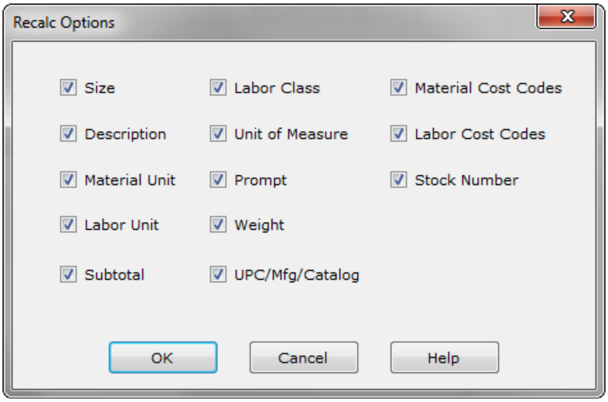


If you changed the pricing for one of your items, the **Update User Defined Values?** option will be enabled. When you check the **Yes** option, Recalc updates the item prices from the Item Database. When you manually change pricing and do not want those prices updated, the **No** selection will skip any items you have manually changed.

The **View Items in Master Database?** option opens a list of items you have edited. It is specifically for imported jobs that used a different database for selection. This verifies the items are in the database.

When Options is clicked, the *Recalc Options* dialog box is displayed as shown in Figure 1-71. The *Recalc Options* dialog box provides a selection of fields to update from the Item Database and into the items in the bid you are working on.

FIGURE 1-71. Recalc Options dialog box



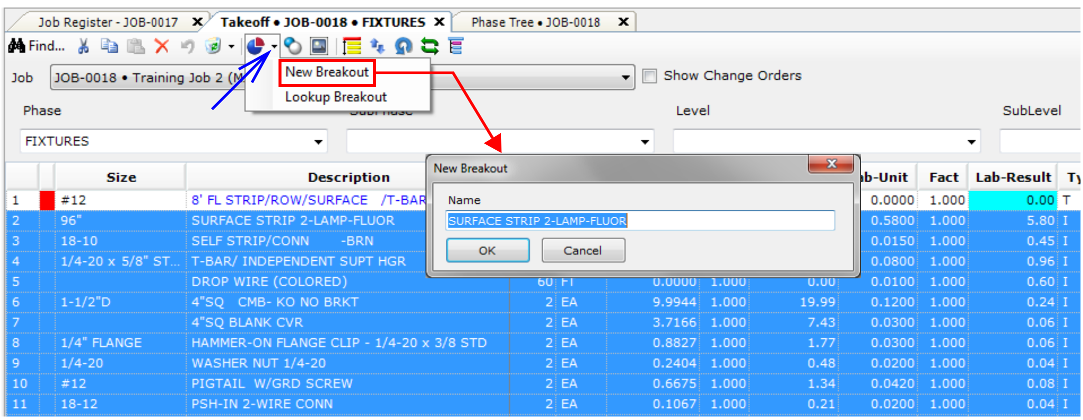
Breakouts

The Breakout feature is included with IntelliBid Plus, Pro and Design Build and can be purchased as an add-on module for Lite. It serves several useful purposes:

- Breakouts are used to establish unit pricing
- Breakouts can be used to create instant *mini-bids*
- Breakouts can be used to perform *what if* analysis for labor costs
- Bid Recap recalculates Breakouts using the labor and other settings in the current bid

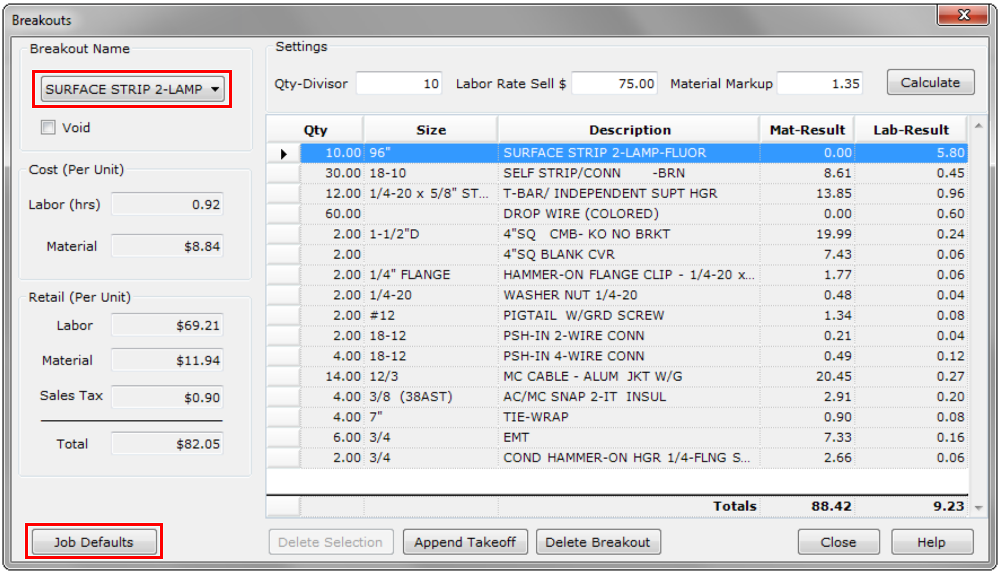
1. To create a Breakout, select several items in the Takeoff grid. Click the Breakout drop-down list on the Toolbar and select New Breakout. The *New Breakout* dialog box is displayed as shown in Figure 1-72.

FIGURE 1-72. New Breakout dialog box



2. Type a name or keep the default for the Breakout Name and click OK. A *Breakouts* dialog box is displayed with the breakout name you assigned as shown in Figure 1-73.

FIGURE 1-73. Breakouts dialog box



3. This shows unit pricing on the labor and material for these items. In the example above, a unit price for SURFACE STRIP 2-LAMP-FLUOR is shown. You can modify the **Labor Rate Sell $** and the **Material Markup** and the unit price will be recalculated. You can remove and add items to the Breakout. Click Close. The breakout is saved and displayed for unit pricing by bid in Bid Recap.

Note: You can also set up Breakout/Job Defaults values to be used for all breakouts. Click the Job Defaults button to make the changes. See Figure 1-73.

Lesson 5 — Summary

Summary is the collection point for all the material being used in the estimate you are creating. It shows total quantity of the material, the unit pricing, total price of the item along with the labor units and total labor hours. **Mat-Unit** column shows the price of each item based upon the Vendor selected in the drop-down list above the Job Grid. At the bottom of the Summary grid are totals for the Material and Labor Hours for the Phase and the Job (upon initial launch of Summary these values are the same).

Material Unit Prices can be changed in the Summary grid by either entering a unit price for each item (which will be displayed in RED indicating a change in Price) or by selecting a different Vendor from the drop-down list. Items in Summary can be sent to supply houses for price updates via the Epic or NetPricer Price Update or by manually entering the price.

Material costs and labor time can be adjusted by the Fact column. Any change to this column will alter the results for those items *on this estimate only*. The changes here are not reflected in the Master Item database.

There are also a number of valuable reports and export functions in Summary that can be invaluable to estimate; Material Cost Request, Stock number, Item Weight, Best Buy, Vendor Comparison and many other valuable reports. Plus, information from the Summary grid can be exported to a number of financial systems.

We won't cover all of these functions here, but you can learn more about them by initiating the Online Help and posting your request.

1. On the Sidebar menu, click the Summary button. The Summary tab and Job Grid are displayed as shown in Figure 1-74.

FIGURE 1-74. Summary tab & Job Grid

Job JOB-0002 • Training Job 2 | Show Change Orders | Vendor TARGET

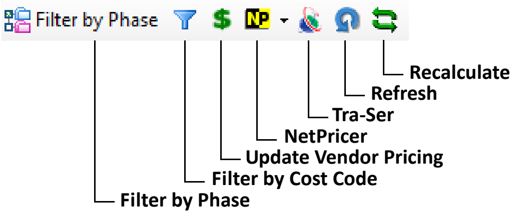
	Qty	Size	Description	Mat-Unit	Fact	M-Resul	Lab-Unit	Fact	L-Result	M-Cost Code	L-Cost Code
1	5.00		TYPE C	0.0000	1.000	0.00	0.0000	1.000	0.00	UNASSIGNED	UNASSIGNED
2	2.00		EXIT/EMERGENCY	0.0000	1.000	0.00	0.0000	1.000	0.00	UNASSIGNED	UNASSIGNED
3	81.00	3/4	EMT	0.5580	1.000	45.20	0.0280	0.930	2.11	BRANCH	BRANCH
4	20.00	2 1/2	EMT	4.5758	1.000	91.52	0.0530	1.000	1.06	FEEDER	FEEDER
5	2.00	2 1/2	EMT 90-ELBOW	30.8102	1.000	61.62	0.4500	1.000	0.90	FEEDER	FEEDER
6	1.00	3/4	EMT DI-CAST-SS COUPLING	0.3571	1.000	0.36	0.0200	0.930	0.02	BRANCH	BRANCH
7	3.00	2 1/2	EMT DI-CAST-SS COUPLING	3.9456	1.000	11.84	0.1200	1.000	0.36	FEEDER	FEEDER
8	20.00	3/4	EMT DI-CAST-SS CONNECTOR	0.3505	1.000	7.01	0.0360	1.000	0.72	BRANCH	BRANCH
9	4.00	2 1/2	EMT DI-CAST-SS CONNECTOR	4.6726	1.000	18.69	0.1280	1.000	0.51	FEEDER	FEEDER
10	4.00	2 1/2	PLASTIC BUSHING	0.9225	1.000	3.69	0.0600	1.000	0.24	FEEDER	FEEDER
11	588.00	12	THHN/THWN CU (STR)	0.1141	1.000	67.07	0.0042	1.000	2.47	BRANCH	BRANCH
12	104.00	3/0	THHN/THWN CU (STR)	2.6279	1.000	273.30	0.0182	0.650	1.23	FEEDER	FEEDER
13	169.00	12.	GREEN THHN CU (GRD 20A)	0.1141	1.000	19.28	0.0042	1.000	0.71	BRANCH	BRANCH
14	26.00	6.	GREEN THHN CU (GRD 200A)	0.4257	1.000	11.07	0.0077	0.650	0.13	FEEDER	FEEDER
15	184.00	12/2	MC CABLE - ALUM JKT W/G	0.4360	1.000	80.22	0.0182	0.935	3.13	BRANCH	BRANCH
16	75.00	12/3	MC CABLE - ALUM JKT W/G	0.7989	1.000	59.92	0.0196	1.000	1.47	BRANCH	BRANCH
17	24.00	#18 to 10	WIRE-NUT SML -YELLOW	0.0857	1.000	2.06	0.0350	1.000	0.84	WIRE & TERMI...	WIRE & TERM...
18	70.00	#18 TO 8	WIRE-NUT MED -RED	0.1448	1.000	10.14	0.0420	1.000	2.94	WIRE & TERMI...	WIRE & TERM...
19	2.00		GROUND SCREW	0.0323	1.000	0.06	0.0300	1.000	0.06	WIRE & TERMI...	WIRE & TERM...
20	10.00	#12 SOL	8" PIGTAIL W/GRD SCREW	0.9873	1.000	9.87	0.0420	1.000	0.42	WIRE & TERMI...	WIRE & TERM...
21	30.00	18-10	SELF STRIP/CONNECTOR -BROWN	0.4400	1.000	13.20	0.0150	1.000	0.45	WIRE & TERMI...	WIRE & TERM...
22	4.00	2.	MECHL LUG AL/CU 1-WIRE 1H	0.7600	1.000	3.04	0.1250	1.000	0.50	WIRE & TERMI...	WIRE & TERM...
23	15.00	2 x 4	T-BAR LAY-IN 3-LAMP-FLUOR	0.0000	1.000	0.00	0.3400	1.000	5.10	QUO FIX DESC...	FIXTURE FIT-UP
24	10.00	96"	SURFACE STRIP 2-LAMP-FLUOR	0.0000	1.000	0.00	0.5800	1.000	5.80	QUO FIX DESC...	FIXTURE FIT-UP
25	5.00	150 W	RND HI-HAT PRE WIRE 1-INCAND	0.0000	1.000	0.00	0.6250	1.000	3.12	QUO FIX DESC...	FIXTURE FIT-UP
26	2.00		EXIT PENDANT MTD 1-FACE	0.0000	1.000	0.00	1.0500	1.000	2.10	QUO FIX DESC...	FIXTURE FIT-UP
27	210.00		DROP WIRE (COLORED)	0.0162	1.000	3.40	0.0100	1.000	2.10	FIXTURE FIT-UP	FIXTURE FIT-UP
28	60.00	515A	LAY-IN T-BAR CLIP UPTURNED LIP	0.2861	1.000	17.17	0.0300	1.000	1.80	FIXTURE FIT-UP	FIXTURE FIT-UP

2. Special Items are listed first, as we entered them in Specials during the Takeoff Step (Fixture C and Exit/Emergency fixture). The columns in this grid can be moved to display the information most useful to you. The columns that are displayed can also be selected in Maintenance > Preferences - User Settings tab.

3. The Summary grid can be sorted by most of the columns. Click in the column heading for **Mat-Unit**, for example and the items will sort in ascending order. Click the column header again and it will be in descending order. You can also find where an item in the Summary grid is used in the Audit Trail in Takeoff by right-clicking on an item and selecting Takeoff Find or Exact Match Find. The *Find Items* dialog box is displayed with the items listed. Click on the entry and you will be taken to that item on the Audit Trail in the correct Phase.

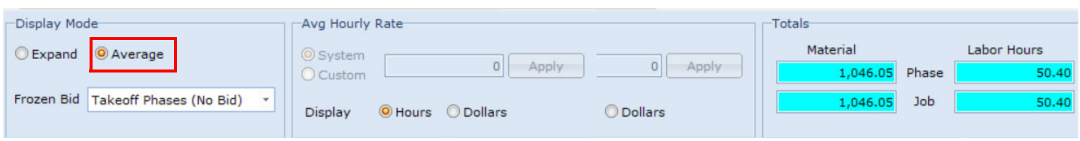
4. The Summary Toolbar has functions to filter the items displayed and functions to update the pricing for your job. Refer to Figure 1-75.

FIGURE 1-75. Summary Toolbar



- **Filter by Phase** — Displays the Phase Tree so you can select the phases you want to see in Summary. You can filter the material list displayed by phase(s). This provides a list of materials needed only for the phase(s) selected. Very helpful to project management and purchasing.
- **Filter by Cost Code** — Displays a dialog box where you can select the Cost Codes you want to see in the Summary grid. Only items assigned the selected cost codes will be shown. This dialog box also gives you the ability to set up standard Cost Code filters that are saved and re-usable. You can set up your own Cost Codes which is especially useful if you want to report using your company's accounting categories. If you want to filter the list by rough installation material for fixtures, click **Filter by Cost Code**, select **400 FIXTURE FIT-UP**, click Add then in **Configurations** drop-down, select **ROUGH-IN** and click OK. The material list is filtered accordingly.
- **Update Vendor Pricing / Epic/ NetPricer /Tra-Ser** — Pricing updates for the items in this job can be performed from the Summary grid to ensure the pricing is up-to-date. Subscriptions are required for pricing services such as Epic, NetPricer and Trade Service (Traser). If material prices are manually keyed into the Summary Grid for the selected Vendor, clicking the **$** will save those costs to the master item (no subscription is required).

FIGURE 1-76. Summary Tab Controls



5. The Display Mode defaults to *Average*. This means like items are combined; this sums the quantities, averages the pricing and labor factor for the hours for those items. *Expand* Display Mode will display items multiple times on the Summary grid. This is because the same item is being used in multiple phases during takeoff with different prices or labor hour values.

Note: Maintenance > Preferences, User Settings tab allows you to set the default to *Expand* if that is preferred.

6. When you have frozen bids for your job, you can use the average hourly rate from that frozen bid in Summary. At the bottom of the Summary window, select a bid name from the Frozen Bid drop-down list.

Note: Some reports require a frozen bid. When prompted, use the Frozen Bid drop-down list to select the bid to use for the report.

7. To use the **Average Hourly Rate** tool, select Dollars and the System option. Frozen bids summarize the phases selected in the bid. Therefore, the average hourly rate is based on only those phases. Also, any factoring performed in the frozen bid will be applied to the Summary as well. If, for example, you have changed Labor Factors for certain Subtotals, those factors will be used in Summary when that bid is selected.

   Use Online Help to learn more about Summary by navigating to **Reports > Summary**. There are a number of valuable reports to assist purchasing, project management and accounting (with exports of data to many popular financial systems).

Lesson 6 — Adding Companies & Contacts

In this lesson, we will be adding companies and contacts we will be working with on this job. This will not cover everything, just what you need to get started. Be sure to use the Online Help button in the Toolbar (or the F1 key) to thoroughly explore each section.

Companies/Contacts

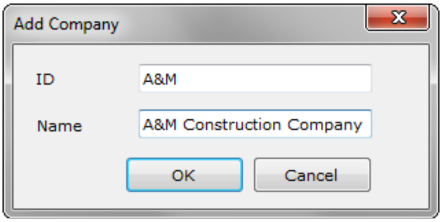
Companies/Contacts identifies the companies (including your own) that contribute to the job: Contractors, Architects, Engineers, Vendors, etc. We will add companies, identify the Company Type and add contacts.

1. On the Sidebar Menu, click the **Companies/Contacts** button. You should at least see one company record in the upper grid with your company name.

Note: You can import Companies and Contacts from your Microsoft Outlook Address book using the Import function on the Toolbar. See Online Help (use the **F1** key). In the Table of Contents look under Companies > Import Companies from Microsoft Outlook.

2. Click the New Company button on the Toolbar. This will display the *Add Company* dialog box as shown in Figure 1-77. Type an ID and Name for one of the companies you usually work with. Click OK.

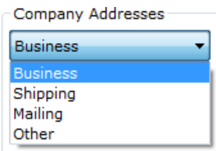
FIGURE 1-77. Add Company dialog box



The company record is added to the grid with the ID and Name displayed in the General tab below the grid.

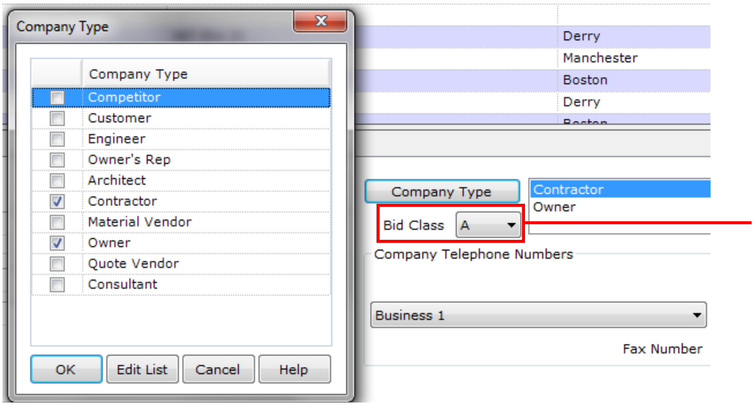
3. With the General tab selected, type an address in Company Address. Company Address provides a drop-down list to allow entry of different types of addresses as shown in Figure 1-78.

FIGURE 1-78. Company Address



4. Click the Company Type button. This will display the *Company Type* dialog box as shown in Figure 1-79.

FIGURE 1-79. Company Type dialog box



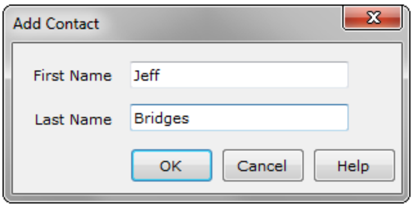
Refer to "Create the Bid Proposal" on page 1-78 for more information about Bid Class.

A company may be assigned multiple types depending on the role the company plays. For example, a company may be the architect and project owner. There are several Company Types that have special uses. The **Quote Vendor** and **Material Vendor** are companies who provide material for the projects and who will be used in either a Quoted material capacity or in a commodity material pricing during Takeoff. A **Quote Vendor** is assigned so that the Vendor can be assigned in the Quote creation step. A **Material Vendor** is assigned so the Vendors material pricing can be selected during Takeoff *and* if the Vendor is to be used in conjunction with the NetPricer price update service (subscription required). You can remove a Company Type by clicking the check box again. **Contractor** and **Owner** company types should be assigned if this company is to receive the proposal generated in the Bid Recap Step. Choose at least one Company Type for each company you add and then click OK. The selected Company Types will display in the text box next to the Company Type button.

Note: You may have noticed the **Edit List** button. Most drop-down lists can be customized to use your terminology and to add more options. Try editing the list now by clicking the **Edit List** button. Add or change a Company Type and click **OK**.

5. Click the Contacts tab. Click the Add button. This displays the *Add Contact* dialog box as shown in Figure 1-80.

FIGURE 1-80. Add Contact dialog box

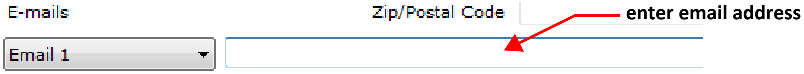


6. Type first and last name for the contact and click OK. This adds the contact name to the **Contacts** drop-down list.

7. Select a **Job Title**, if applicable. Check the box when the person is the **Main Contact**.

8. Type the contact's **email address** as shown in Figure 1-81.

FIGURE 1-81. Contact email address



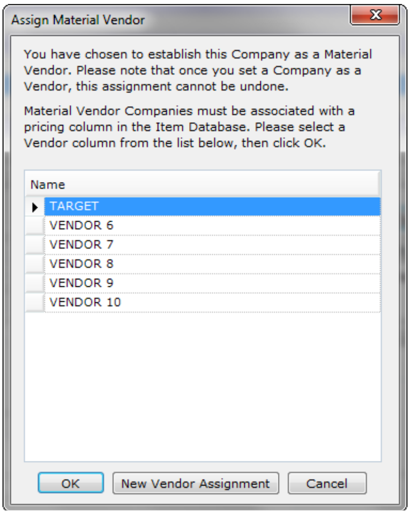
You will need this to email messages to this contact utilizing the Journal/Messaging tab. The address and phone information defaults to the company information. Edit any items that need to be changed.

Note: Type your email address on the contact record for one of the companies. In Lesson 10, we will send communications from Journal/Messaging. You will see how the messages look in email.

9. Click on the General tab. Next we will add a *vendor* company. Click the New Company button on the Toolbar. This will display the *Add Company* dialog box. Type a company **ID** and **Name** to add a supply company. If your vendor companies are already loaded, select one of your material vendors.

10. Click Company Type and select Material Vendor. The *Assign Material Vendor* dialog box is displayed as shown in Figure 1-82, for you to chose a pricing column. The pricing for Material Vendor companies is stored in the database. Select one of the unused labels (VENDOR 3, 4, etc.) to replace with the name of your supply house. Click **VENDOR 6** and enter **ACME SUPPLY** or click the **New Vendor Assignment** button. Select VENDOR # to set up the tables for the item pricing you get from this vendor. These companies are listed in Maintenance > Items > Vendor for importing pricing as well.

FIGURE 1-82. Assign Material Vendor dialog box

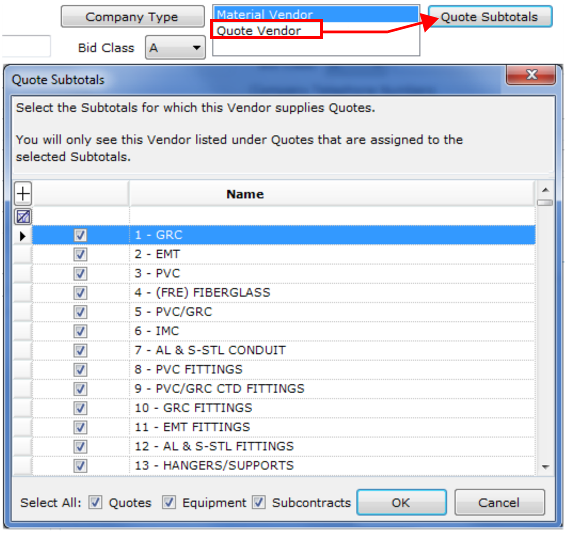


11. Click OK to save and close the *Assign Material Vendor* dialog box. In the *Company Type* dialog box, select Quote Vendor for this company in addition to Material Vendor. Specifying Quote Vendor makes this company available in Quotes. Click OK to close the *Company Type* dialog box.

12. To add a second Material Vendor, repeat steps 8, 9 and 10.

13. Add several more companies specifying **Quote Vendor** as the Company Type. When you select Quote Vendor, a Quote Subtotals button appears next to Company Type on the General tab. When selected, the *Quote Subtotals* dialog box is displayed as shown in Figure 1-83. This dialog box allows you to specify specific subtotals for the vendor. In Quotes, this vendor will appear for the quotes that are assigned one of these subtotals. For now, we will not specify subtotals, click Cancel to close the dialog box.

FIGURE 1-83. Quote Subtotals dialog box



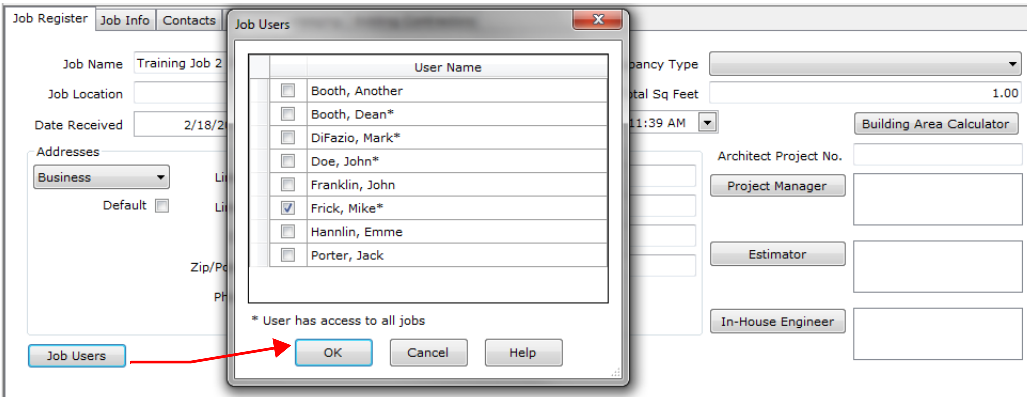
14. Click the Contacts tab. Add at least one contact for each company you just added by highlighting the company in the grid, making sure you add an email address and then clicking the Add button.

15. If you have other companies already listed in the grid, click on each one and review the information in the General and Contacts tabs. Repeat these steps and enter as many companies and contacts as you wish. For the Quote lesson you will need several quote vendors. Also, be sure the your contact record has your email address entered. You should also enter your email address on a contact in another company. You can always return to the **Companies/Contacts** Sidebar Menu and add what you need.

Job Register

16. Select Jobs > Job Register. Job Register and Job Info tabs record details about the job and for reporting. Two fields that you may need are **Job Users** on the Job Register tab and **Tax Rates** on the Job Info tab.

FIGURE 1-84. Job Users dialog box

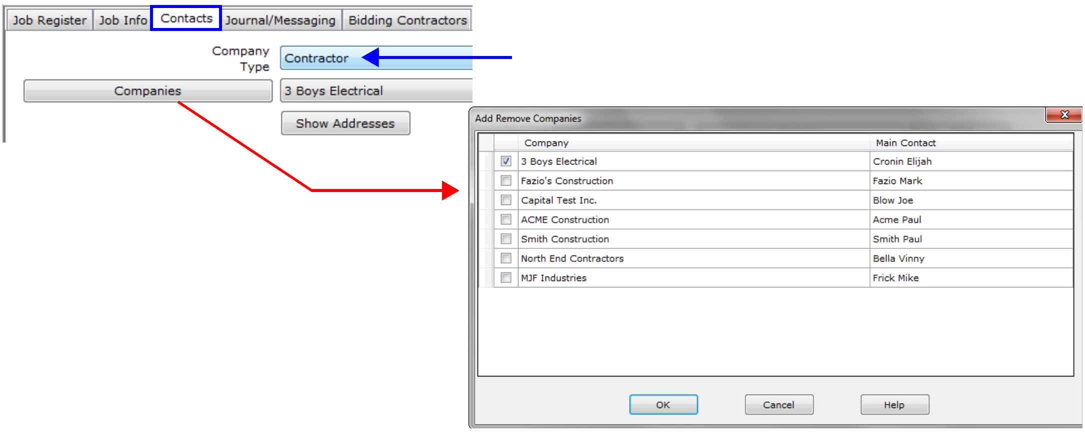


17. Click Contacts tab. Select Companies that you will be working with on this job. This is an important step because only companies assigned to this job will be listed in drop-down lists while working on this job.

18. Select Contractor from the **Company Type** drop-down list.

19. Click Companies to display the *Add Remove Companies* dialog box as shown in Figure 1-85. A list of the companies that have been assigned as a Contractor is shown.

FIGURE 1-85. Add Remove Companies dialog box

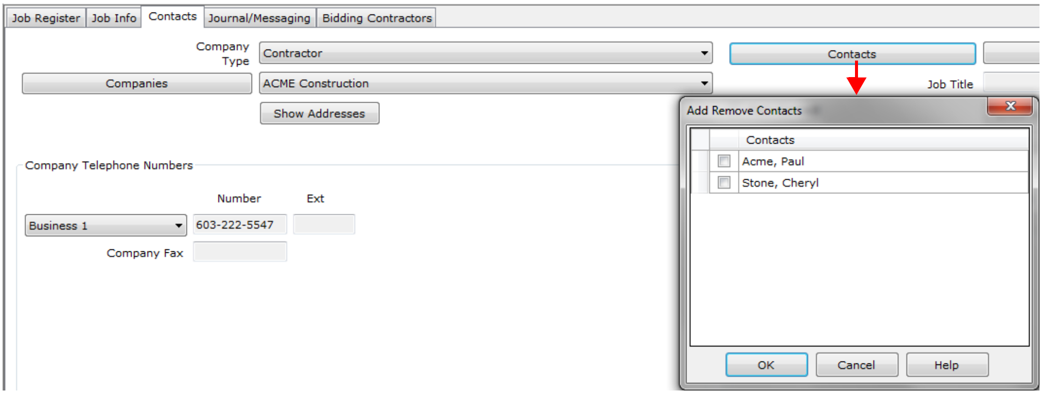


Note: If you do not see the company you are looking for, the Company may not have been added in the Companies/Contacts section yet, it may have a different Company Type or no company type was assigned. Return to the Companies tab to verify company and company type.

20. Click the check boxes to assign companies to the job. To remove a company, click the check box again. Click OK.

21. Click Contacts to display the *Add Remove Contacts* dialog box as shown in Figure 1-86.

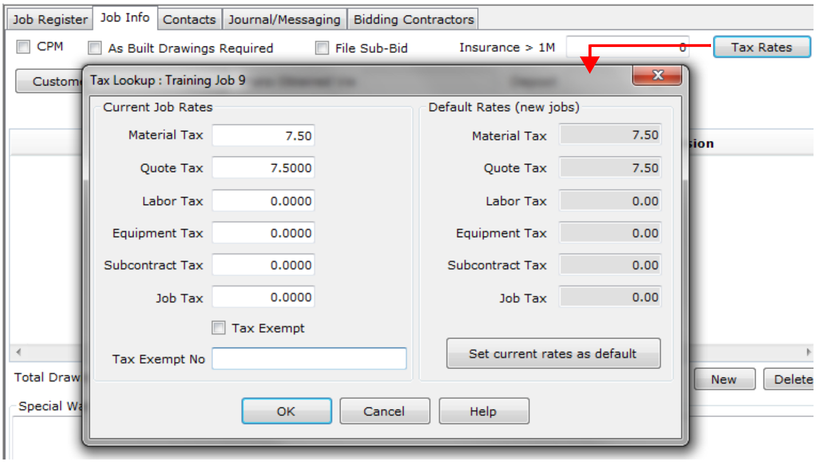
FIGURE 1-86. Add Remove Contacts dialog box



22. You can allow other users access to the jobs you create. Anyone with rights to all jobs (as set in **Maintenance > User Access**) will already have access to your jobs. Others can be allowed access on a job-by-job basis using this dialog box. Click **Job Users** to select other users. Adding users to a job can become very useful in multiple user installations and when the time available to build the estimate is compressed. Adding users to the job means multiple estimators can work on the same estimate at the same time.

23. The other setting you will want to check is the **Tax Rates** since these affect bid calculations. Click Job Info tab and select Tax Rates. This will display the *Tax Lookup* dialog box as shown in Figure 1-87.

FIGURE 1-87. Tax Lookup dialog box

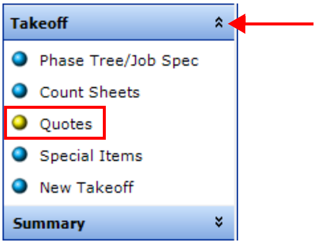


24. There are 2 sets of rates. For most people the tax rates will be the same for all jobs - it depends on where you do business. Enter the rates you normally use in the **Current Job Rates** column on the left and click the Set current rates as default button. These rates will be used for all new jobs. You still have the option of changing the rates for individual jobs or marking a job tax exempt. For example, if you are bidding a job in another state, you can open the *Tax Rates* dialog box and enter the rates for that job estimate in the Current column and click OK. The Current rates will be used for that job only.

Lesson 7 — Quotes in Takeoff

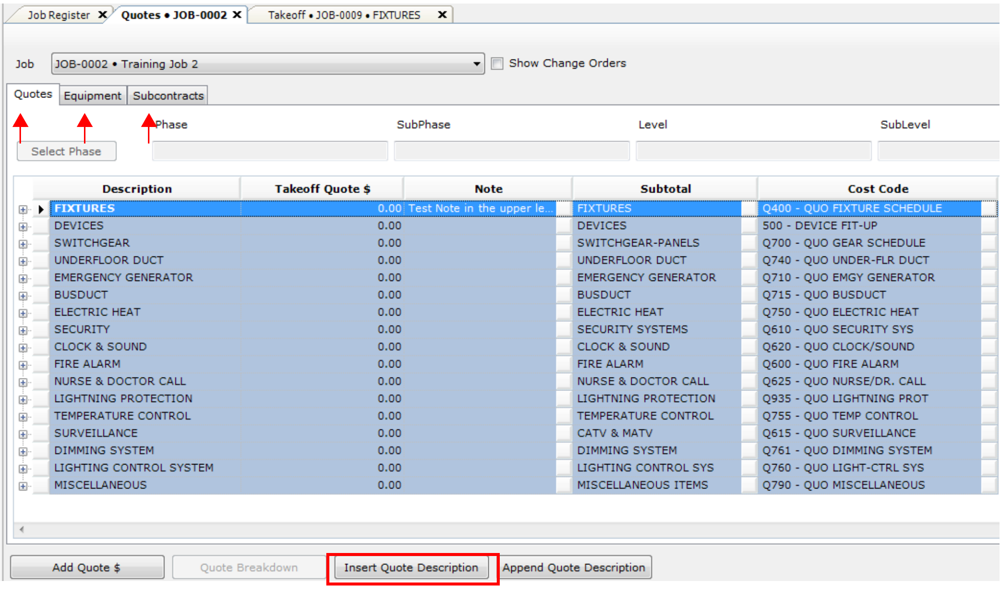
Quotes record the material, equipment and subcontract quotes you are submitting for pricing from a vendor. We will set up the quotes we expect to receive and later, enter the quote amount as the quotes come in from the vendors. All quotes are listed in the bid and you use either this section or the Bid Recap Quotes windows to enter quote information. You select the quotes you want to include in the bid in Bid Recap. Quotes are handled in one of two methods: LOT (or PACKAGE PRICE or Lump Sum quote) or UNIT PRICING. For a LOT price, contractors receive a single price for all items of a particular type from their supply house which has all the items in a lump sum, i.e. a FIXTURE LOT PRICE or the FIXTURE Package Price that has a single price for ALL lighting fixtures or GEAR Package Price or Gear Quote for all switchgear. Sometimes the material in the quote has to be priced as individual units in the estimate and the supply house will provide a price breakdown for each item in the Lot: Fixture A cost is $99, Fixture B cost is $88 and so on. In this section of the Lesson we will enter Quote Breakdown for the Fixtures we entered in the Special Items in Chapter 3. To access Quotes, expand the **Takeoff** button by clicking the arrows as shown in Figure 1-88.

FIGURE 1-88. Quotes menu selection



1. Click the **Quotes** selection. This displays the Quotes tab window as shown in Figure 1-89. The Quotes tab is made up of 3 sub-tabs; Quotes, Equipment and Subcontracts.

FIGURE 1-89. Quotes tab



Description allows you to organize and assign quotes to specific phases. You can add a Description to this job by using the Insert Quote Description button at the bottom-center of the window. Each description lists all the Bids associated with this job. When you create a job, one bid is assigned. Later, if you create additional bids (i.e. Alternate 1, Alternate 2, Bid with Alternates and other base bids), they will be listed under each Description. This allows you to set up different quotes for each bid.

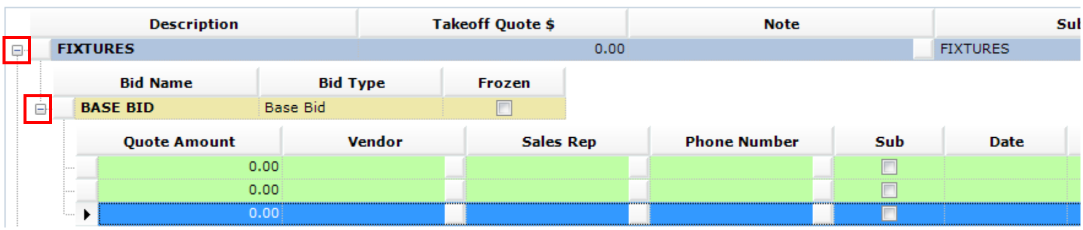
Note: Select Maintenance > Bid Templates > Quotes to change the descriptions for all new jobs.

Add a Quote

In this lesson, we will be submitting quote requests to 3 different vendors.

2. Click the plus sign next to FIXTURES to expand the quote tree as shown in Figure 1-90.

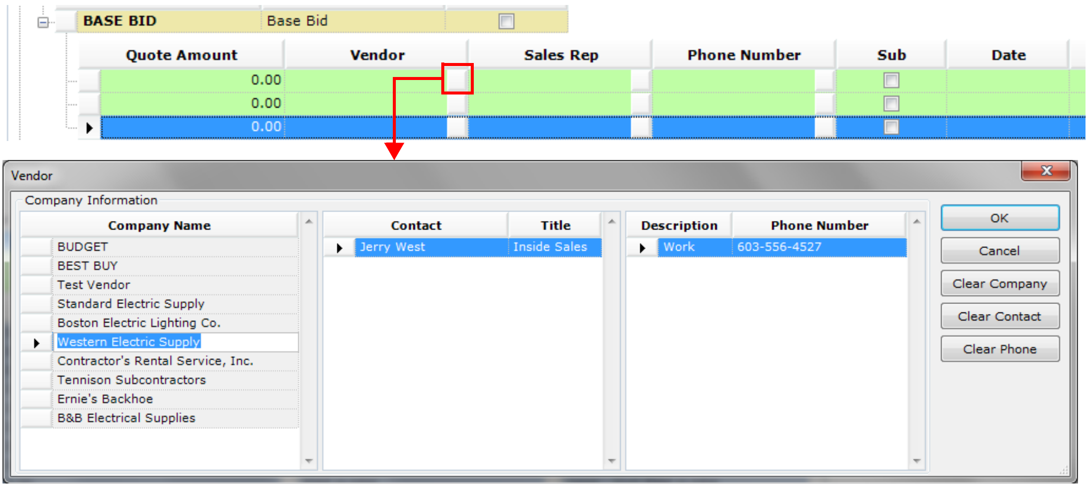
FIGURE 1-90. Fixtures - quote tree



3. Quotes are added to a bid, in this case BASE BID. Select the row labeled **Base Bid** and click the Add Quote $ button at the bottom-center of the window *or* right-click and select **Add Quote $**. This adds a row below the Base Bid. Add a total of 3 quote rows.

4. Click the Vendor button as shown in Figure 1-91. The *Vendor* dialog box is displayed.

FIGURE 1-91. Vendor dialog box

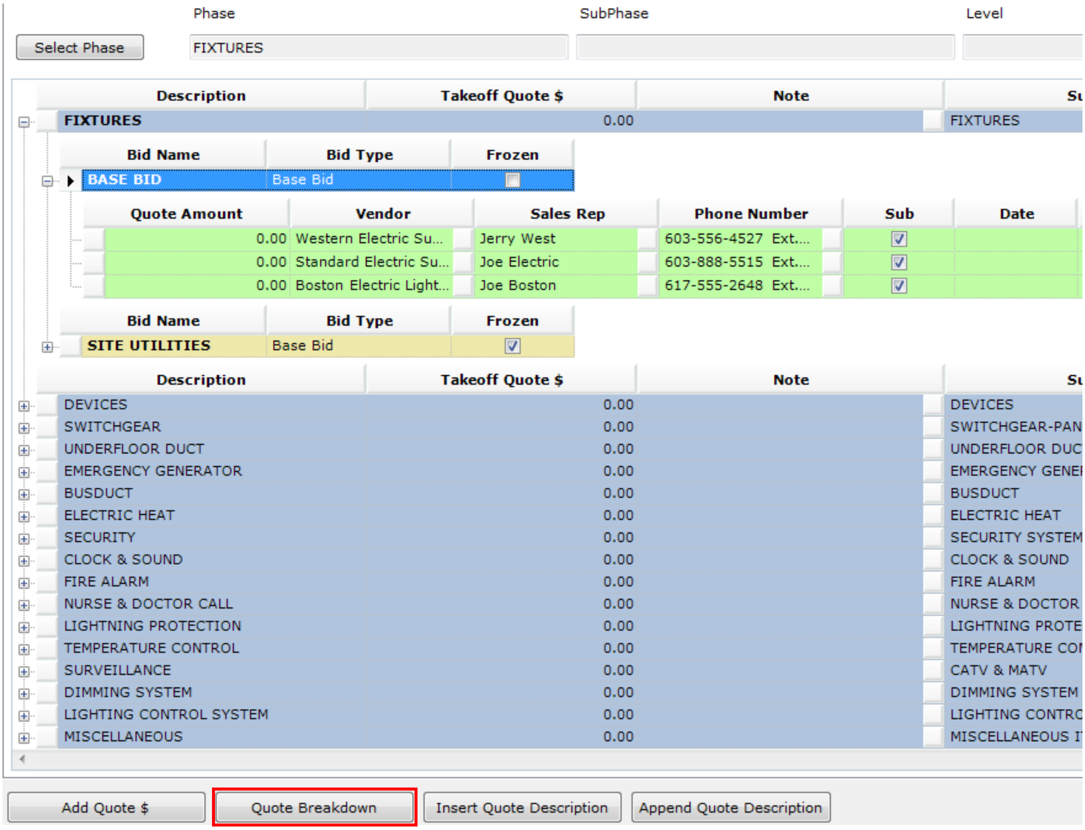


BUDGET and BEST BUY are special categories that are automatically included in the Company Name list. The amounts for these are set depending on the results of the Quote Breakdown. The vendors listed are those added in Companies/Contacts and assigned a Company Type of **Quote Vendor**.

Note: If you do not see a list of companies, go to “Companies/Contacts” on page 3-51 and add your vendor companies, being sure to specify **Company Type = Quote Vendor**. When you return to the Quotes tab, those vendors will be listed.

5. In the *Vendor* dialog box, select a Company (vendor) and contact (if there is more than one) and click OK. This will add **one** Company and contact to your list. Click the Vendor button on the next row. The *Vendor* dialog box is displayed. Select a company and contact and click OK. This added your **second** Company and contact. Perform the same process for the third vendor. Refer to Figure 1-92.

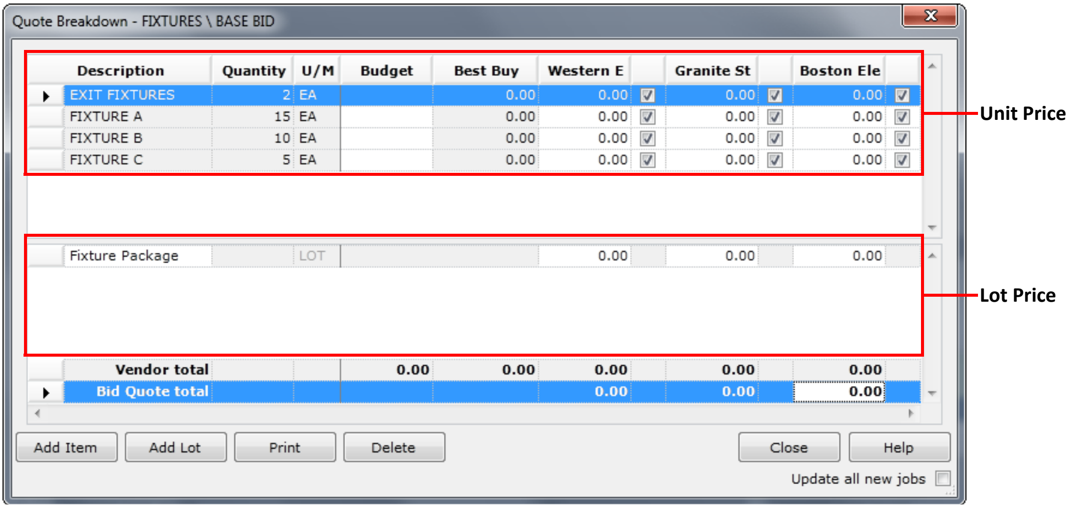
FIGURE 1-92. Adding a quote to Bid specifying 3 vendor companies



6. If you receive the quote amounts from the vendors as a Lot Price (or package price for that material), enter the vales in the **Quote Amount** column as you receive them. The quote amount can be entered as a total in the Quote Amount column. You will also be able to enter and modify quote amounts in Bid Recap.

7. If you need to track a quote by unit from the vendors as a Lot Price (or package price for that material), use the **Quote Breakdown** option. Highlight one of the Quote rows and click the Quote Breakdown button shown in Figure 1-92. The *Quote Breakdown* dialog box is displayed as shown in Figure 1-93.

FIGURE 1-93. Quote Breakdown dialog box



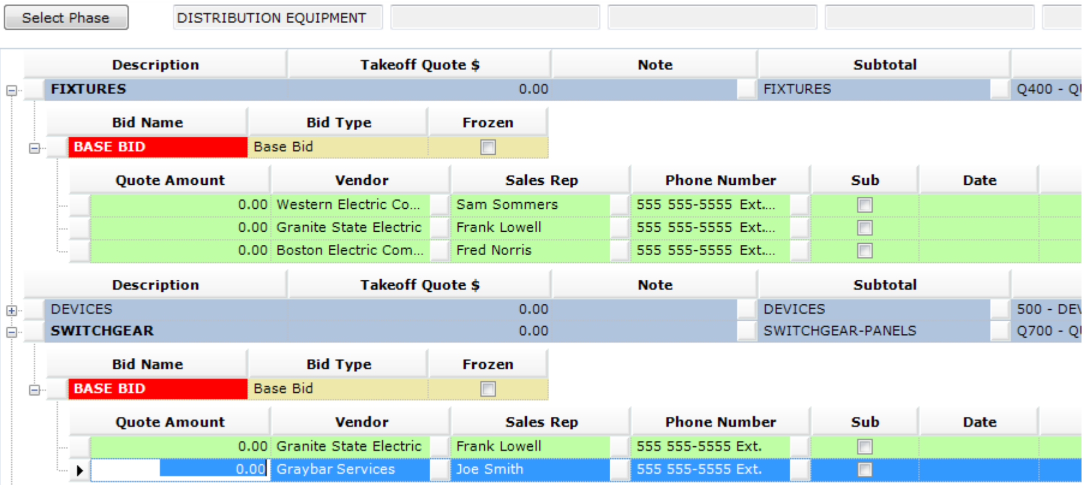
The grids do not have any rows when you first open this dialog box. The column labeled Budget is where you can enter an estimated or budgeted amount. Use this when you have to submit a bid before the quote values are provided to you from your quote vendors. The Best Buy column displays the lowest quote from the vendor columns. Pricing by item is shown in the top grid. Pricing by lot in the center.

The Comment rows added during Takeoff that were assigned unique Descriptions and the Subtotal FIXTURES that have quantity values are picked up as quotes for Quote Breakdown, so the 4 Fixtures we added are listed automatically.

8. Additional items can be entered manually. Click Add Item button to add a row to the upper grid.
9. When a vendor supplies a lot price rather than a unit price, click the Add Lot button to open a row in the lower grid (i.e. the Fixture Package Lot). Leave pricing at zero, because they are requests for quotes.
10. Click Close to close the *Quote Breakdown* dialog box.

    Notice the Bid row (BASE BID) background has turned red (Figure 1-94). This is a reminder during bid processing that there are quotes that need values. This will be addressed in Lesson 8 - Bid Recap.
11. Add Switchgear quotes as shown in Figure 1-94. In Bid Recap we will enter amounts and select a vendor.

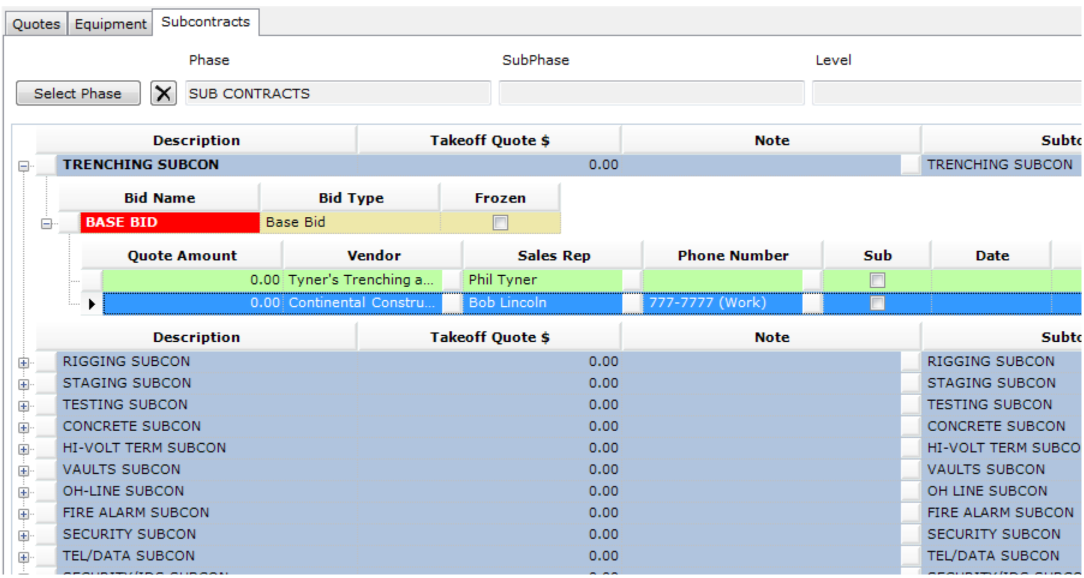
FIGURE 1-94. Add Switchgear



Note: The Quote Descriptions are displayed as bold when there are quote rows added. This is a visual reminder that quotes have been entered for this bid. Both FIXTURES and SWITCHGEAR appear in bold text in the grid.

12. Click the Subcontract tab. Add quotes using the same steps 3, 4 and 5. Add 2 more quotes for Trenching on the Subcontracts tab as shown in Figure 1-95.

FIGURE 1-95. Subcontracts - Trenching



Review Takeoff

You now know how Item Libraries work and how to navigate through them. You have created a job and worked in several different phases and added both individual items and assemblies to the takeoff. You have learned how to take off fixtures and to answer the prompts that calculate the quantities you need. You saw how IntelliBid's smart estimating *remembers* key values for additional items added from the same catalog.

You saw how the Audit Trail is built and have an idea of the information available for your estimate. You learned that you can edit values in the grid and how colors are used.

We reviewed Summary which basically gives you an item list for your job and how to prepare for quotes from your vendors.

Becoming completely familiar with IntelliBid will take time and there are many features we did not cover in this document. Use the Online Help files and take advantage of the Online Training Sessions available to you with your purchase (contact **ConEst IntelliBid** training department to learn what training is available to your company). We are continually updating and adding to the Item database making it as easy and complete as possible. Updates are available on the **ConEst** Bulletin Board on the Internet and by email. Make sure you are on our mailing list! See the topic Online Service Center in the IntelliBid Installation Guide "Online Service Center" on page 2-20 for information on receiving updates.

Lesson 8 — Bid Recap

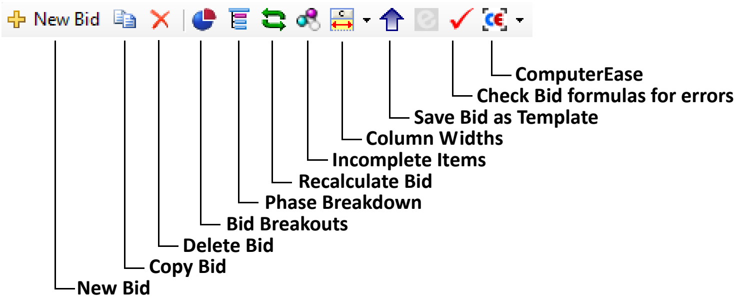
In the Takeoff, we selected items, entered the anticipated quantity measurements and added the quote records while waiting for the vendors to respond. Now we are ready to prepare a formal bid to submit to the General Contractors. Up to this point, we have performed a takeoff to establish our material costs and labor man-hours. We will now complete the process to arrive at our bid price.

Some of your items or numbers may differ from the illustrations. You are learning the software right now, so don't worry if your *answers* differ from the lessons.

Bid Recap Toolbar

The Bid Recap Toolbar contains the operations for the current selection. Tool tips are displayed when the mouse is paused over these buttons. Refer to Figure 1-96.

FIGURE 1-96. Bid Recap Toolbar



New Bid — Displays the *Bid Recap - New Bid* dialog box. Gives you the ability to create a different version of the original bid. You can create as many bids as you need to complete your work.

Copy Bid — Displays the *Copy Bid* dialog box. Allows copying an existing bid and renaming it as a new bid. This can be used to play with *what-if* scenarios without losing any of the original settings.

Delete Bid — Deletes the bid. There must always be at least one bid, so this button is disabled when there is only one bid.

Bid Breakouts — Displays the *Bid Breakouts* dialog box. These are the *mini-bids* (unit prices) you created in Takeoff. The Breakouts use the average labor rates from the Bid to calculate the pricing in Bid Recap.

Phase Breakdown — Displays the *Phase Breakdown* dialog box. Provides cost analysis of the job by phase or for the entire job. You can choose the level of phases, how to analyze and how the results are displayed. You can review by the Dollar amount, labor hours or square footage. Reports are also available from the dialog box.

Recalculate Bid — Goes through all the tabs and performs calculations on all fields. This is a good way to ensure all your values are correct after making any edits and before submitting a bid. Recalculate does not update values from the master or original template; it works only with the values already in this bid. For example, if you had modified the labor rates for the *Journeymen Electrician* in the Master Bid Template that new rate would not be brought forward to this bid.

Incomplete Items — Displays the *Incomplete Items* dialog box. This lists any items you have in the bid with the Prompt field checked. This is a reminder list for items you want to check before finalizing the bid.

Column Widths — Columns can be sized to the width you prefer. Drag the column dividers to resize a column and use the drop-down arrow to **Save Column Widths**. **Restore Default Column Widths** sets the column sizing to the default widths.

Save Bid as Template — Displays the *Enter a New Bid Template Name* dialog box. Takes the current bid template values entered into the current bid and saves it as a template. If you have entered values in each of the bid tabs just the way you want them and it's a format you would like to use again, use this function. The bid template format you are using on this bid and values entered in to the bid, i.e. Labor rates, Burden, Fringe $, OverHead and Profit etc (except for quotes) will be saved and be listed in Bid Template Maintenance under the Bid Template Name you assigned. When creating a New Job, you can use this template as the one identified in the *New Job* dialog box and create new bids in other jobs using this same format.

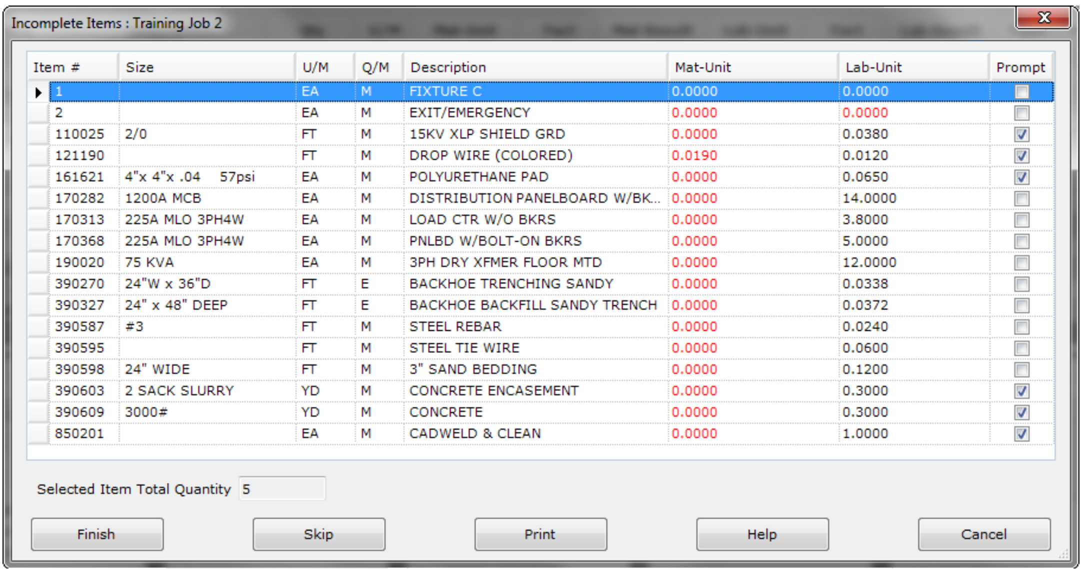
Check Bid formulas for errors — Checks the template for errors that could make the calculations fail. If you have made modifications to the formulas or rows in the template you are using (creating a new bid, for example), this will check for possible errors first and list the cell and formula if it finds issues.

ComputerEase — Configure and export the bid information to ComputerEase Accounting software.

Start Bid Recap

1. On the Sidebar menu, click Bid Recap. If there are *Incomplete Items* in your job, the *Incomplete Items* dialog box is displayed as shown in Figure 1-97.

FIGURE 1-97. Incomplete Items dialog box



Item #	Size	U/M	Q/M	Description	Mat-Unit	Lab-Unit	Prompt
1		EA	M	FIXTURE C	0.0000	0.0000	☐
2		EA	M	EXIT/EMERGENCY	0.0000	0.0000	☐
110025	2/0	FT	M	15KV XLP SHIELD GRD	0.0000	0.0380	☑
121190		FT	M	DROP WIRE (COLORED)	0.0190	0.0120	☑
161621	4"x 4"x .04 57psi	EA	M	POLYURETHANE PAD	0.0000	0.0650	☑
170282	1200A MCB	EA	M	DISTRIBUTION PANELBOARD W/BK...	0.0000	14.0000	☐
170313	225A MLO 3PH4W	EA	M	LOAD CTR W/O BKRS	0.0000	3.8000	☐
170368	225A MLO 3PH4W	EA	M	PNLBD W/BOLT-ON BKRS	0.0000	5.0000	☐
190020	75 KVA	EA	M	3PH DRY XFMER FLOOR MTD	0.0000	12.0000	☐
390270	24"W x 36"D	FT	E	BACKHOE TRENCHING SANDY	0.0000	0.0338	☐
390327	24" x 48" DEEP	FT	E	BACKHOE BACKFILL SANDY TRENCH	0.0000	0.0372	☐
390587	#3	FT	M	STEEL REBAR	0.0000	0.0240	☐
390595		FT	M	STEEL TIE WIRE	0.0000	0.0600	☐
390598	24" WIDE	FT	M	3" SAND BEDDING	0.0000	0.1200	☐
390603	2 SACK SLURRY	YD	M	CONCRETE ENCASEMENT	0.0000	0.3000	☑
390609	3000#	YD	M	CONCRETE	0.0000	0.3000	☑
850201		EA	M	CADWELD & CLEAN	0.0000	1.0000	☑

These are items in Takeoff that have the **Prompt** check box set to **Yes**. This dialog box allows you to enter or edit pricing or you can return to Takeoff to perform this. This feature is used for any items you may want to check before submitting the final bid.

2. The first 2 items listed in Figure 1-97 are the fixtures we added in Special Items. They are here because we left the **Prompt** field checked in Special Items Maintenance. The actual cost is included in the assemblies that make up these fixtures, so we don't need to see them listed. Click in the **Prompt** check box to remove the check mark. This means these 2 items will not be listed the next time you open the *Incomplete Items* dialog box. We put the Switchgear panels out for quotes, so uncheck those as well.

Values in red can be changed therefore, you would want to provide values before finalizing the bid. These can be updated in the Takeoff window and in Bid Recap using the Incomplete Items function in the Toolbar. For this lesson we will leave pricing and labor values alone.

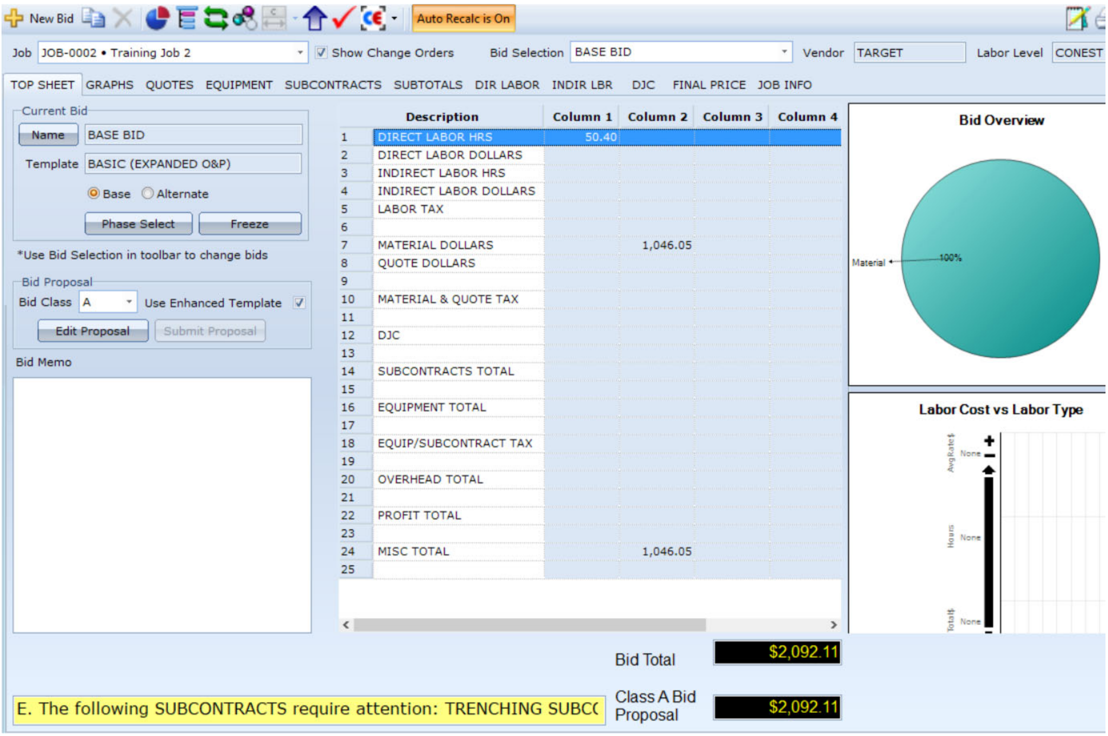
3. Click the Finish button to continue. Any entries made to the Incomplete items list will be saved to the job. For Instance if you entered a Mat-Unit for an item that value will be saved to the item throughout the bid.

- Click Skip if you **do not** want any changes you've made to the Prices or Labor on the Incomplete Items list to take affect. You can come back to them and enter the values at a later time.

Tab Headings

Bid Recap consists of tabs starting with the T**op Sheet**. A summary of the bid as shown in Figure 1-98. The **Bid Selection** displays the template being used with the selected Bid (remember you have the option of selecting a template when you create a new job - more on the templates later). The Current Bid section show the **Name *** of the Current Bid selected and it also it identifies this as a **Base** bid or an Alternate and it shows the Template associated with the Current Bid in the Name * window. Up until the time that you have finalized all entries and changes to the bid, you have the option of selecting the phases you want included in the bid. Once you have completed the estimate and the bid, you select the Freeze button to lock in all of your changes to the bid. This means if you return to the Takeoff in any phase, you will not affect the values set in the bid when it was frozen. This prevents you from inadvertently making edits to the wrong bid.

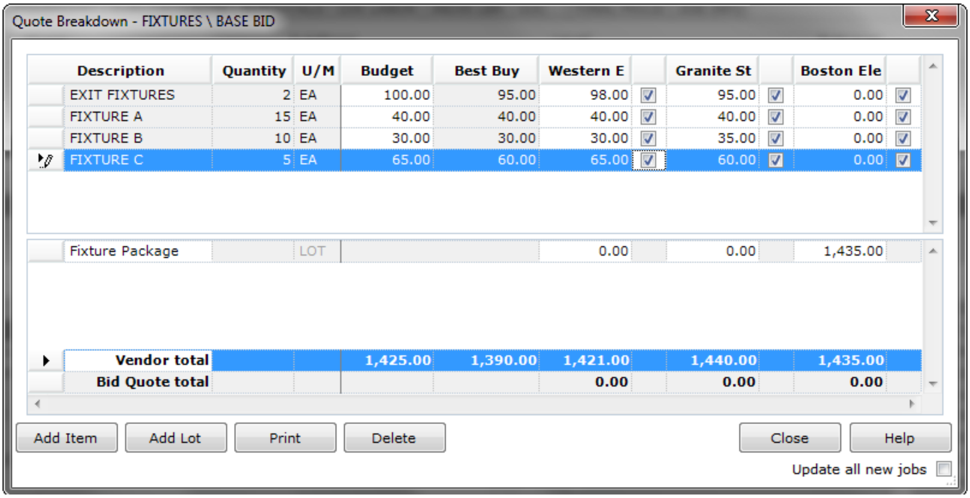
FIGURE 1-98. Bid Recap tab



1. Notice the yellow banner scrolling at the bottom of the window. This is an alert that there are Quotes, Equipment or Subcontracts Quotes assigned to this Bid that have not been selected. You do not have to include the quotes to complete your bid; this simply reminds you to check on the Quote status. In this lesson you are being warned that there are unassigned Fixture and Subcontract Quotes in this bid.

2. Click the Quotes tab. This window looks and operates the same as the Quotes tab we used in Takeoff. You can still add vendors and quotes just as we did earlier, but Bid Recap is the only place you can choose the quotes that will be included in the bid. Since we used Quote Breakdown earlier, we will complete the quotes with that dialog box. Select one of the Quote rows under the FIXTURES Quote Description and then click the Quote Breakdown button at the bottom of the window. This will display the *Quote Breakdown* dialog box as shown in Figure 1-99.

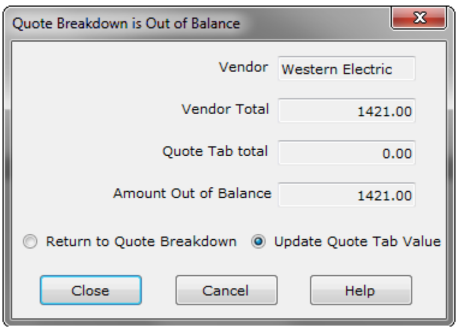
FIGURE 1-99. Quote Breakdown dialog box



3. Enter budget and quote amounts for each fixture by typing values in the columns headed by the vendor names. The **Best Buy** column is updated with the lowest price as you enter values. Click Close.

4. Each quote amount entered here is compared with the value on the Quotes tab. If the amounts do not match, the *Quote Breakdown is Out of Balance* dialog box is displayed as shown in Figure 1-100.

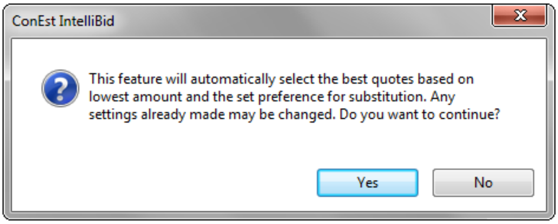
FIGURE 1-100. Quote Breakdown - Out of Balance



5. Since the values were all zeros on the Quotes tab and you have now entered values, this dialog box is displayed. In this case we want to update the Quotes tab with the values we just entered in Quote Breakdown. Click Close for each of the vendors. If you want to return to the Quote Breakdown and adjust values further, select the radio button **Return to Quote Breakdown** and the *Quote Breakdown* dialog box will be displayed as shown in Figure 1-99. Clicking Cancel closes the dialog box without making changes to the Quotes tab.

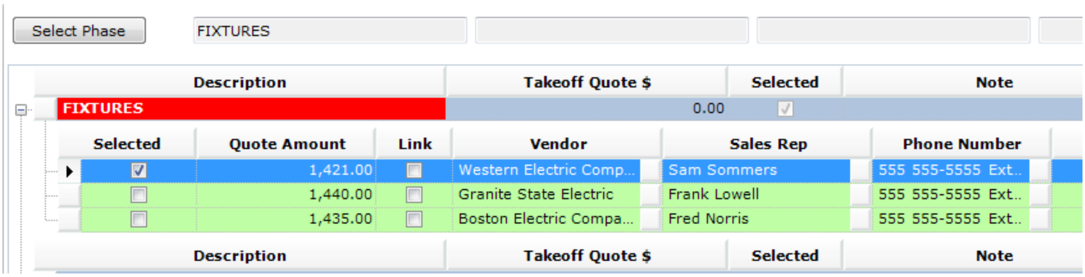
6. You can use the **Select** option to choose the best (lowest) quote for each of the quote entries, i.e. Fixtures, Switchgear and so on or you can manually select it. This is a simple example and it is easy to select the lowest bid yourself, but when there is a long list of quotes, using the auto **Select** option saves time and is more accurate. Click the Select button at the bottom of the window. This will display the best quotes pop-up as shown in Figure 1-101. Click Yes.

FIGURE 1-101. Select best quotes pop-up



Note: The Quote Alarm feature identifies quotes that have not been added to the bid, by turning the background red as shown in Figure 1-102. When a quote is selected the alarm is cleared, the amount added to the total and the background is set to the default. You can manually turn off the alarm using the right-click menu and selecting **Clear Alarm**.

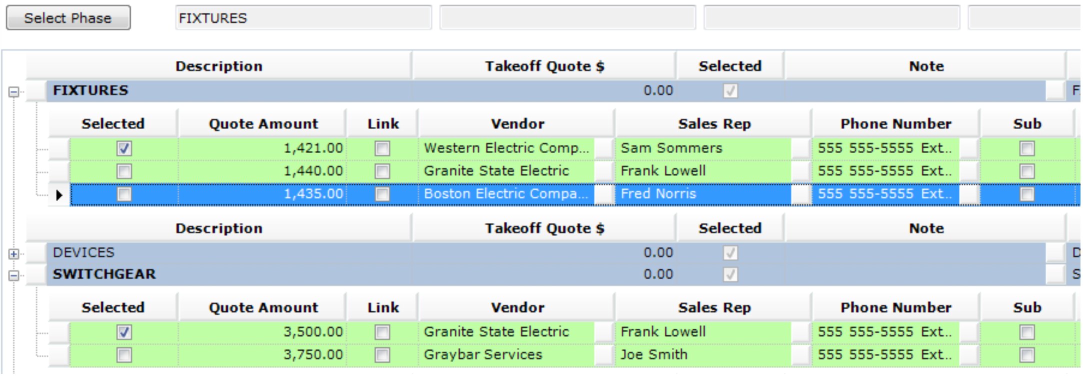
FIGURE 1-102. Selected column



7. The selected quote that will be included in the bid is identified by a check mark in the **Selected** column as shown in Figure 1-102. Select and deselect quotes using the check box in this column.

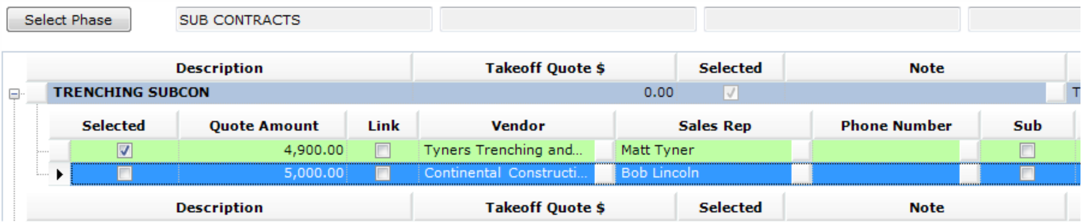
8. Expand the SWITCHGEAR Quotes. Enter the quote amounts directly into the <u>Quotes</u> tab this time. Select the Quote you want to include with the bid by checking the **Selected** check box as shown in Figure 1-103.

FIGURE 1-103. Check Switchgear Selected box



9. Click the Subcontract tab and enter the quotes directly into the Quotes tab for *Trenching Subcontractor* and select the quote you want to include in the bid as shown in Figure 1-104.

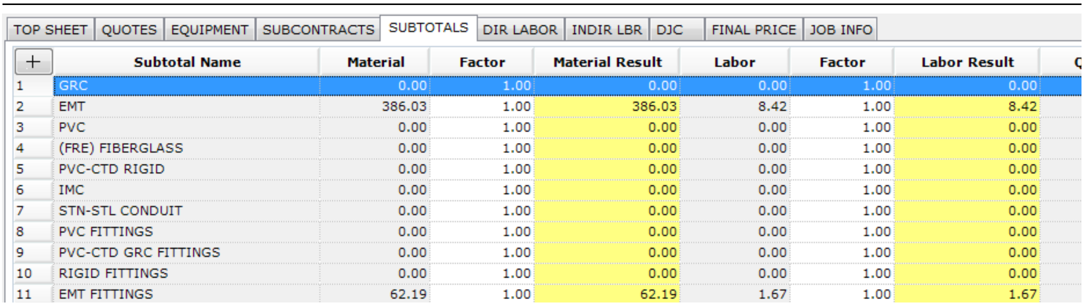
FIGURE 1-104. Trenching quote



Note: Use the Print drop-down menu and select **Quote Request Report**. The report is very useful when you set up Quote Breakdown. Once you do, this report can be exported to a .pdf file and emailed to your vendors, or printed and mailed with your request for quoted packages.

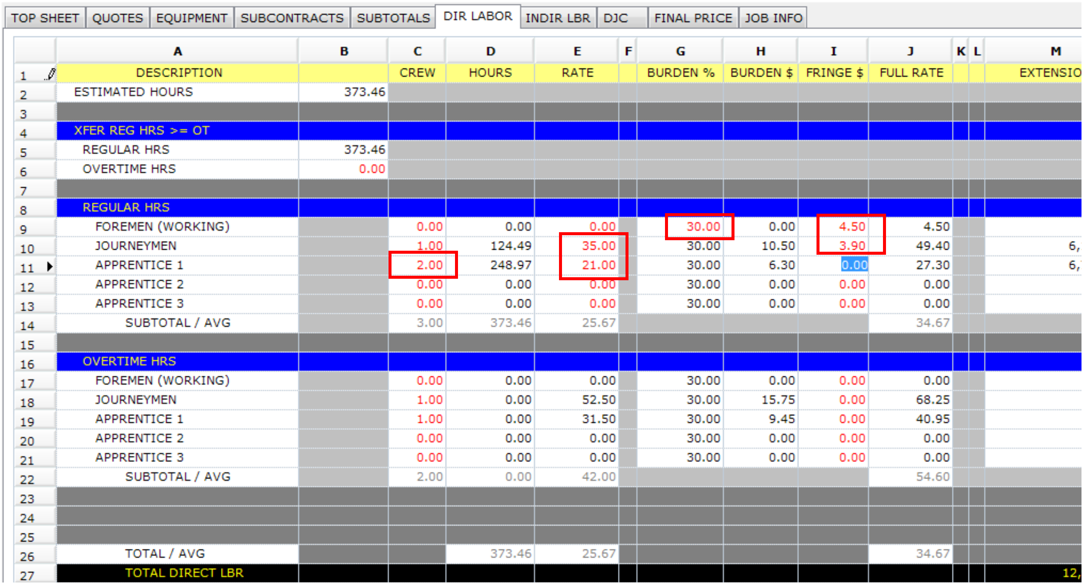
10. Click the Subtotal tab to edit Subtotal values as shown in Figure 1-105. This gives you flexibility to adjust the bid for a particular result. Modifications to subtotals is a way to account for volume discounting, distributor quotes, or to adjust factors for job costing. These are more advanced topics. Review Subtotals in the Online Help.

FIGURE 1-105. Subtotals tab



11. Click the tab DIR LABOR as shown in Figure 1-106. The DIR LABOR (or direct labor) tab contains the preset labor values for your electricians. The values shown in Figure 1-106 were preset in the Master Template (See Lesson 12). Once the values are set in the Master Template any bid you create and use this template with will carry these values. They can be modified if access to that function has been provided by the System Administrator to the User.

FIGURE 1-106. Direct Labor tab



TOP SHEET | QUOTES | EQUIPMENT | SUBCONTRACTS | SUBTOTALS | DIR LABOR | INDIR LBR | DJC | FINAL PRICE | JOB INFO

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	DESCRIPTION		CREW	HOURS	RATE		BURDEN %	BURDEN $	FRINGE $	FULL RATE			EXTENSIO
2	ESTIMATED HOURS	373.46											
3													
4	XFER REG HRS >= OT												
5	REGULAR HRS	373.46											
6	OVERTIME HRS	0.00											
7													
8	REGULAR HRS												
9	FOREMEN (WORKING)		0.00	0.00	0.00		30.00	0.00	4.50	4.50			
10	JOURNEYMEN		1.00	124.49	35.00		30.00	10.50	3.90	49.40			6,
11	APPRENTICE 1		2.00	248.97	21.00		30.00	6.30	0.00	27.30			6,
12	APPRENTICE 2		0.00	0.00	0.00		30.00	0.00	0.00	0.00			
13	APPRENTICE 3		0.00	0.00	0.00		30.00	0.00	0.00	0.00			
14	SUBTOTAL / AVG		3.00	373.46	25.67					34.67			
15													
16	OVERTIME HRS												
17	FOREMEN (WORKING)		0.00	0.00	0.00		30.00	0.00	0.00	0.00			
18	JOURNEYMEN		1.00	0.00	52.50		30.00	15.75	0.00	68.25			
19	APPRENTICE 1		1.00	0.00	31.50		30.00	9.45	0.00	40.95			
20	APPRENTICE 2		0.00	0.00	0.00		30.00	0.00	0.00	0.00			
21	APPRENTICE 3		0.00	0.00	0.00		30.00	0.00	0.00	0.00			
22	SUBTOTAL / AVG		2.00	0.00	42.00					54.60			
23													
24													
25													
26	TOTAL / AVG			373.46	25.67					34.67			
27	TOTAL DIRECT LBR												12,

Note: The template chosen may have DIR LBR for the label; the Union template separates labor in multiple tabs with the label starting LBR.

The focus is on a few important values. It is not necessary to enter values in every cell, just the ones you need for your bid.

When you make changes in Bid Recap, you are changing the information for **this bid only**. Later we will modify the Bid Template so that each job you create will have your rates and values loaded into the bid automatically.

12. Every item in the master database has labor units assigned to them. As you add items to the bid, the Labor Hours are calculated. In Bid Recap the **Estimated hours** is displayed on the Top Sheet tab and here in column **B/Row 2**. These hours are divided equally in the Hours column for the crew numbers specified. You can modify the crew mix for the job. Change the Crew Apprentices to **2.00** by double-clicking cell C11 and typing **2** for APPRENTICE 1. Observe the hours calculated in the column **D**.

Note: In Bid Recap to edit a cell you MUST double-click the cell. Unlike on Takeoff and Summary where a single click places a cell in edit mode. Also, only RED cells an be edited.

13. The values are *Costs*, not your Bill Rates. You can enter a Rate that includes Burden and Fringe or enter separate amounts in the appropriate columns. Double-click in cell E10 to enter the rate for your Journeyman. We used **35.00**; your rate probably differs. Type in the rate and press **Enter** to save the value. Pressing **Enter** moves the cursor to the field directly below the current field and keeps edit mode on, so that you can type the next value without double-clicking the field.

As you enter the values for the rates, the extension values change. The total bid is displayed in the bottom of each tab.

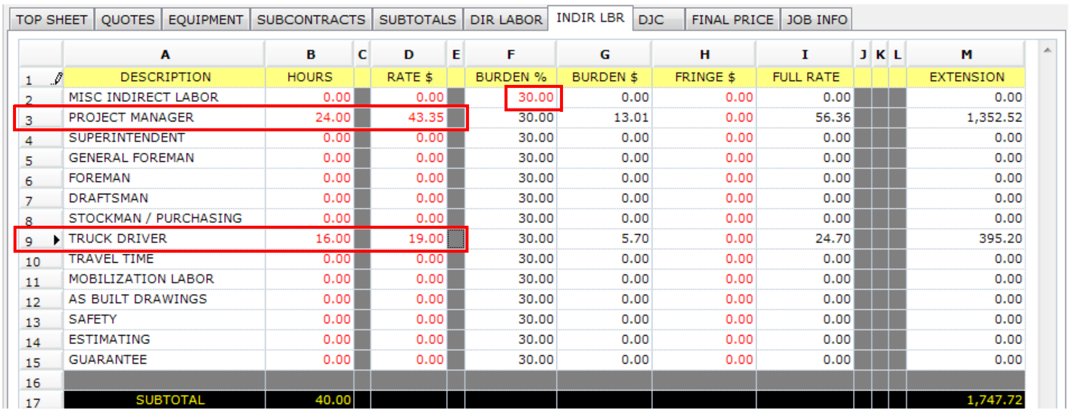
14. In **Apprentice 1** column **E** Rate (cell E11), we entered **21.00.** Enter the rate you use for your apprentice level employees and press **Enter** to save the value.

15. **Burden** is any payment made for the employee such as Workmen's Comp, FICA, Fed/State Unemployment and so on. This template uses a percentage that applies to all employees. Double-click the cell for Burden% in row 9 and enter **30.**

16. Press **Tab** twice to move to the **Fringe $** column. **Fringe** is typically the benefits package for your employees, i.e., holidays, vacation, health insurance, etc. expressed as an hourly value. For our example; in **Fringe $** column **I**, enter **4.50** for the Foreman and **3.90** for the Journeyman.

17. Click the INDIR LBR tab as shown in Figure 1-107.

FIGURE 1-107. Indirect Labor tab



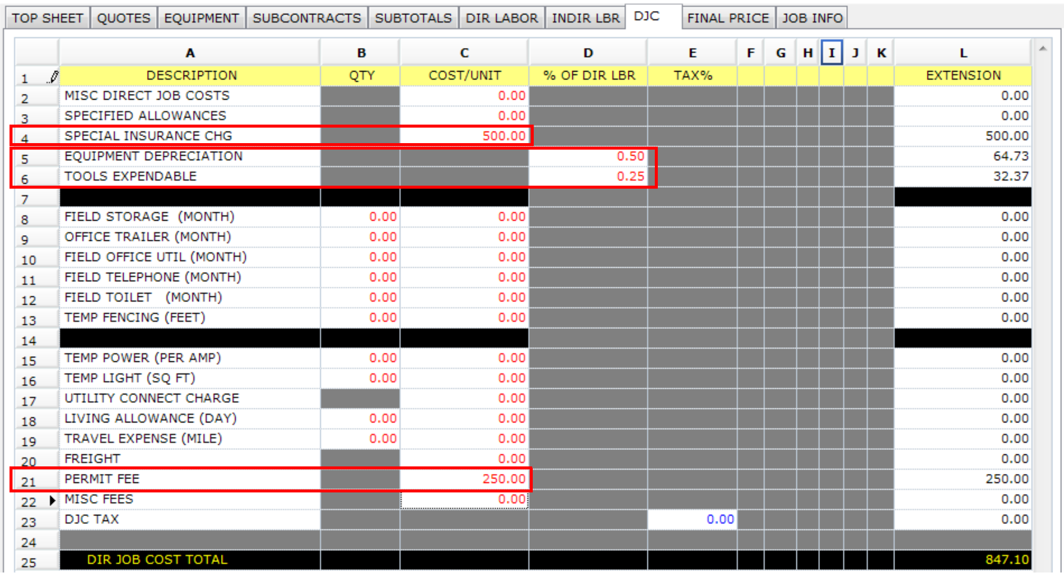
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	DESCRIPTION	HOURS		RATE $		BURDEN %	BURDEN $	FRINGE $	FULL RATE				EXTENSION
2	MISC INDIRECT LABOR	0.00		0.00		30.00	0.00	0.00	0.00				0.00
3	PROJECT MANAGER	24.00		43.35		30.00	13.01	0.00	56.36				1,352.52
4	SUPERINTENDENT	0.00		0.00		30.00	0.00	0.00	0.00				0.00
5	GENERAL FOREMAN	0.00		0.00		30.00	0.00	0.00	0.00				0.00
6	FOREMAN	0.00		0.00		30.00	0.00	0.00	0.00				0.00
7	DRAFTSMAN	0.00		0.00		30.00	0.00	0.00	0.00				0.00
8	STOCKMAN / PURCHASING	0.00		0.00		30.00	0.00	0.00	0.00				0.00
9	TRUCK DRIVER	16.00		19.00		30.00	5.70	0.00	24.70				395.20
10	TRAVEL TIME	0.00		0.00		30.00	0.00	0.00	0.00				0.00
11	MOBILIZATION LABOR	0.00		0.00		30.00	0.00	0.00	0.00				0.00
12	AS BUILT DRAWINGS	0.00		0.00		30.00	0.00	0.00	0.00				0.00
13	SAFETY	0.00		0.00		30.00	0.00	0.00	0.00				0.00
14	ESTIMATING	0.00		0.00		30.00	0.00	0.00	0.00				0.00
15	GUARANTEE	0.00		0.00		30.00	0.00	0.00	0.00				0.00
16													
17	SUBTOTAL	40.00											1,747.72

18. The Labor Hours for this job will only be for the actual installation. No time is charged for management. While many contractors carry the components on this tab as overhead, others charge them against the job. For Project Manager (row 3), we entered **24** hours (double-click the cell) with a rate of **43.35 (**D3)**.** Enter a **Burden %** of **30.00** in row 2. In this template, the values for Indirect Labor are entered as actual hours for that classification, some templates use a percentage of the job for calculating Indirect Labor. The process is the same, enter your estimate of the job total each component would take.

19. For Truck Driver, enter **16** hours (B9) with a rate of **19.00** (D9). Remember to press **Enter** or **Tab** to save the values.

20. Click the DJC (Direct Job Costs) tab as shown in Figure 1-108.

FIGURE 1-108. DJC (Direct Job Cost) tab



TOP SHEET | QUOTES | EQUIPMENT | SUBCONTRACTS | SUBTOTALS | DIR LABOR | INDIR LBR | DJC | FINAL PRICE | JOB INFO

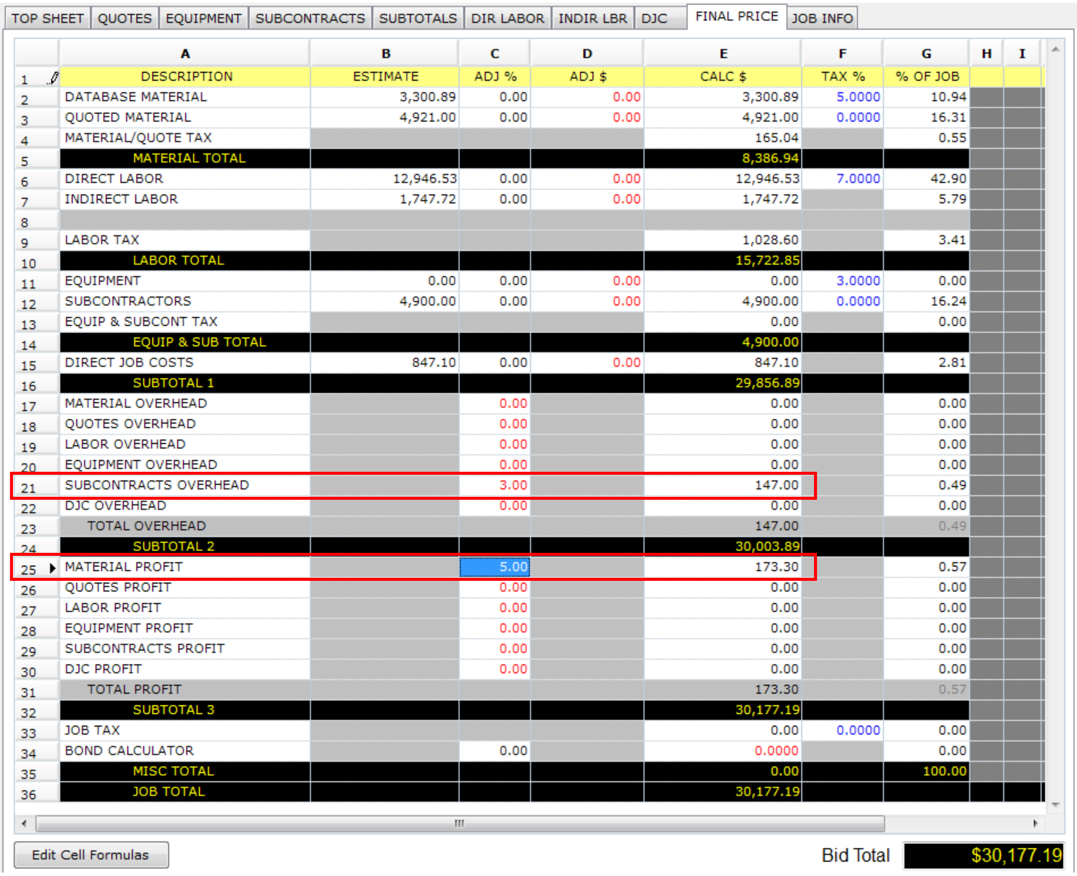
	A	B	C	D	E	F	G	H	I	J	K	L
1	DESCRIPTION	QTY	COST/UNIT	% OF DIR LBR	TAX%							EXTENSION
2	MISC DIRECT JOB COSTS		0.00									0.00
3	SPECIFIED ALLOWANCES		0.00									0.00
4	SPECIAL INSURANCE CHG		500.00									500.00
5	EQUIPMENT DEPRECIATION			0.50								64.73
6	TOOLS EXPENDABLE			0.25								32.37
7												
8	FIELD STORAGE (MONTH)	0.00	0.00									0.00
9	OFFICE TRAILER (MONTH)	0.00	0.00									0.00
10	FIELD OFFICE UTIL (MONTH)	0.00	0.00									0.00
11	FIELD TELEPHONE (MONTH)	0.00	0.00									0.00
12	FIELD TOILET (MONTH)	0.00	0.00									0.00
13	TEMP FENCING (FEET)	0.00	0.00									0.00
14												
15	TEMP POWER (PER AMP)	0.00	0.00									0.00
16	TEMP LIGHT (SQ FT)	0.00	0.00									0.00
17	UTILITY CONNECT CHARGE		0.00									0.00
18	LIVING ALLOWANCE (DAY)	0.00	0.00									0.00
19	TRAVEL EXPENSE (MILE)	0.00	0.00									0.00
20	FREIGHT		0.00									0.00
21	PERMIT FEE		250.00									250.00
22	MISC FEES		0.00									0.00
23	DJC TAX				0.00							0.00
24												
25	DIR JOB COST TOTAL											847.10

21. DJC tab provides entries to account for job costs or expenses depending on what the job requires and how you charge for other costs. The *MISC DIRECT JOB COSTS* entry can be used to lump costs as one sum. For example, there may be a special insurance charge on this job. Double-click column **C** for *SPECIAL INSURANCE CHG* and enter **500.00**.

22. Enter an *Equipment Depreciation* of **0.50** (D5) and *Tools Expendable* of **.25** (D6). The values that don't normally change can be loaded into a bid template and they will already be in your bid. *Permit Fee* is one that can vary on a job by job basis. Double-click in cell C21, enter **250.00** and press **Enter**.

23. Click FINAL PRICE tab, as shown in Figure 1-109. This tab summarizes the data we entered in the previous tabs for final totals on Material, Labor, Equipment and Subcontracts, Quotes and Direct Job Costs. This tab provides the place to include overhead and profit and to make adjustments to the total dollar amounts.

FIGURE 1-109. Final Price tab



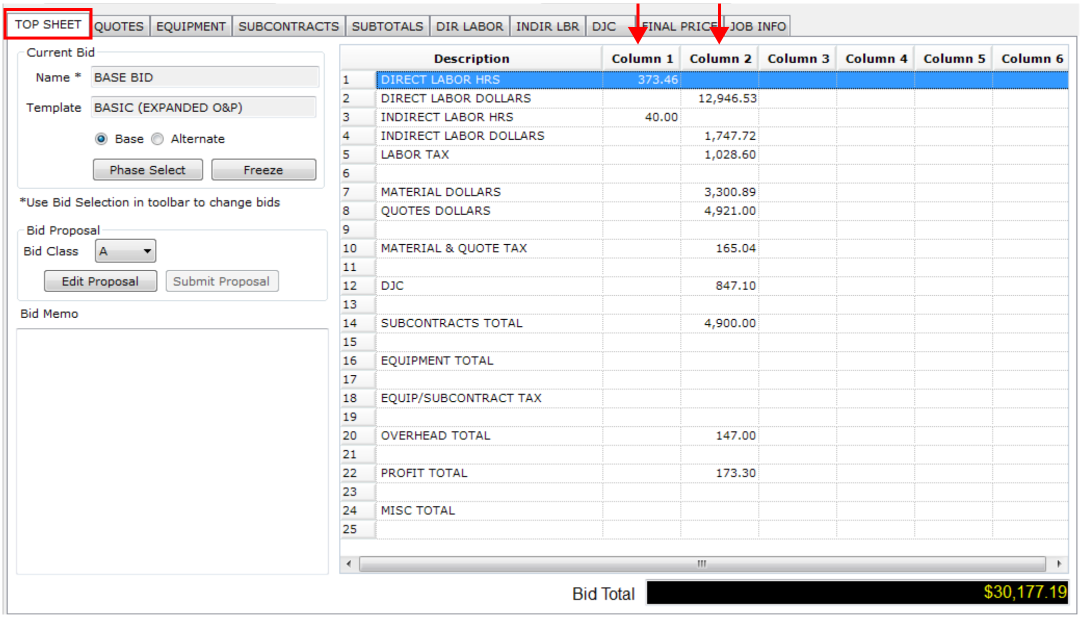
	A	B	C	D	E	F	G	H	I
1	DESCRIPTION	ESTIMATE	ADJ %	ADJ $	CALC $	TAX %	% OF JOB		
2	DATABASE MATERIAL	3,300.89	0.00	0.00	3,300.89	5.0000	10.94		
3	QUOTED MATERIAL	4,921.00	0.00	0.00	4,921.00	0.0000	16.31		
4	MATERIAL/QUOTE TAX				165.04		0.55		
5	MATERIAL TOTAL				8,386.94				
6	DIRECT LABOR	12,946.53	0.00	0.00	12,946.53	7.0000	42.90		
7	INDIRECT LABOR	1,747.72	0.00	0.00	1,747.72		5.79		
8									
9	LABOR TAX				1,028.60		3.41		
10	LABOR TOTAL				15,722.85				
11	EQUIPMENT	0.00	0.00	0.00	0.00	3.0000	0.00		
12	SUBCONTRACTORS	4,900.00	0.00	0.00	4,900.00	0.0000	16.24		
13	EQUIP & SUBCONT TAX				0.00		0.00		
14	EQUIP & SUB TOTAL				4,900.00				
15	DIRECT JOB COSTS	847.10	0.00	0.00	847.10		2.81		
16	SUBTOTAL 1				29,856.89				
17	MATERIAL OVERHEAD		0.00		0.00		0.00		
18	QUOTES OVERHEAD		0.00		0.00		0.00		
19	LABOR OVERHEAD		0.00		0.00		0.00		
20	EQUIPMENT OVERHEAD		0.00		0.00		0.00		
21	SUBCONTRACTS OVERHEAD		3.00		147.00		0.49		
22	DJC OVERHEAD		0.00		0.00		0.00		
23	TOTAL OVERHEAD				147.00		0.49		
24	SUBTOTAL 2				30,003.89				
25	MATERIAL PROFIT		5.00		173.30		0.57		
26	QUOTES PROFIT		0.00		0.00		0.00		
27	LABOR PROFIT		0.00		0.00		0.00		
28	EQUIPMENT PROFIT		0.00		0.00		0.00		
29	SUBCONTRACTS PROFIT		0.00		0.00		0.00		
30	DJC PROFIT		0.00		0.00		0.00		
31	TOTAL PROFIT				173.30		0.57		
32	SUBTOTAL 3				30,177.19				
33	JOB TAX				0.00	0.0000	0.00		
34	BOND CALCULATOR		0.00		0.0000		0.00		
35	MISC TOTAL				0.00		100.00		
36	JOB TOTAL				30,177.19				

24. Enter a **Subcontract Overhead** of **3.00** (C21) and **Material Profit** of **5.00** (C25). Column **D** is where you add adjustments for Material, Quotes, Labor, Subcontracts and Equipment. Tax % is linked to Job Register window > Job Info tab > Tax Rates and shows the value you entered there. This can be modified for this job by entering a new tax rate and clicking OK. On the Bid Recap window, click the Recalculate Bid button. Your new tax rate is displayed with an updated calculation.

On all these tabs, we have entered just a few of the values you would normally want to set up in an actual bid. These steps provide a view of what is available on each of the tabs in Bid Recap. There is much more here than what we have used in this example. Remember, any of the values displayed in red can be edited and will be included in your final bid total. Feel free to add Overhead and Profit percentages for the other components on the Bid Recap tab.

25. Click the Top Sheet tab. The totals in Column 1 and 2 are updated to reflect the changes you made in the other tabs as shown in Figure 1-110.

FIGURE 1-110. Top Sheet tab - totals



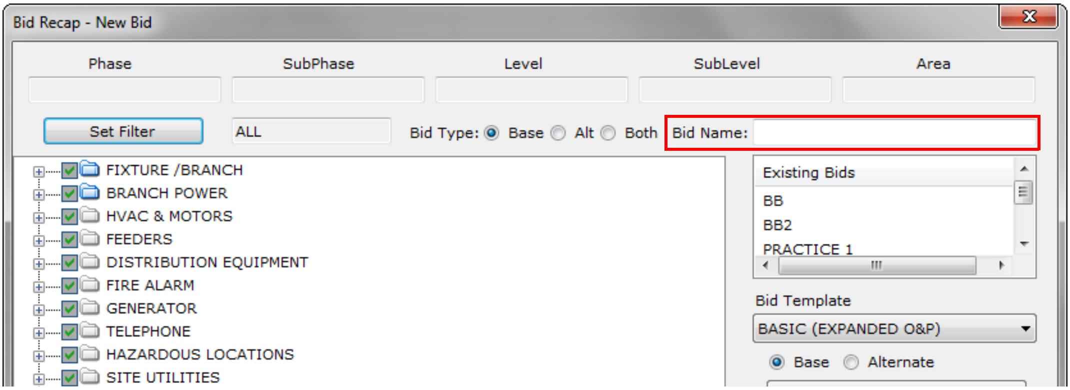
Note: The fields included in the Top Sheet can be customized. See "Top Sheet Maintenance" on page 3-110.

Create a New Bid

You can create as many bids as you like for any job. This gives you the ability to create a different version of the original bid. You can copy the current bid which means this bid will use the same template or you can create a new bid using a different template (see page 3-82). The advantage of copying a bid is that all the edits you applied to the current bid will be in the new bid. It you create a new bid and assign a different template to it, the values in that template will be applied to the job values (material cost, labor hours) and any specific values you entered i.e, Permit Fee, Indirect Labor values, will need to be re-entered into the new bid.

1. Click the New Bid button on the Toolbar. This displays the *Bid Recap - New Bid* dialog box as shown in Figure 1-111.

FIGURE 1-111. Bid Recap - New Bid



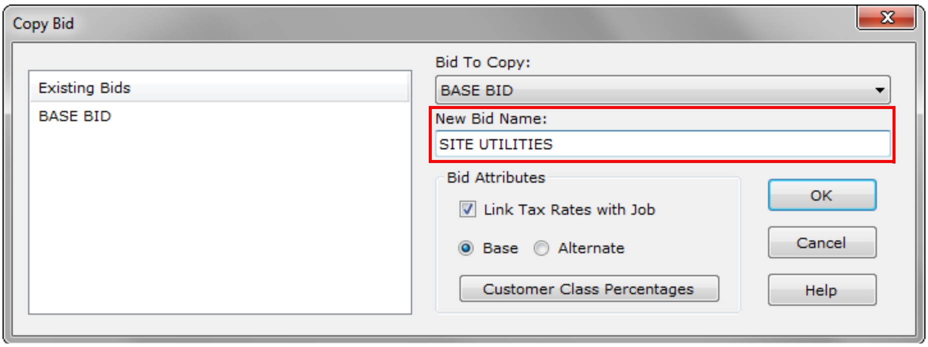
2. In **Bid Name:**, type a new bid name and click Bid Recap.
3. On the **Bid Recap** tab, under **Current Bid/Name** is your new bid name.

Copy an Existing Bid

You can create as many bids as you like for any job. You can copy the current bid which means this bid will use the same template.

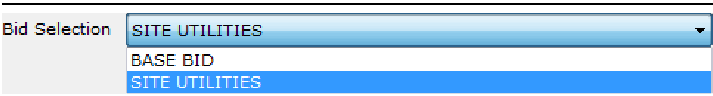
1. On the Toolbar, click the Copy Bid button. The *Copy Bid* dialog box is displayed as shown in Figure 1-112.

FIGURE 1-112. Copy Bid dialog box



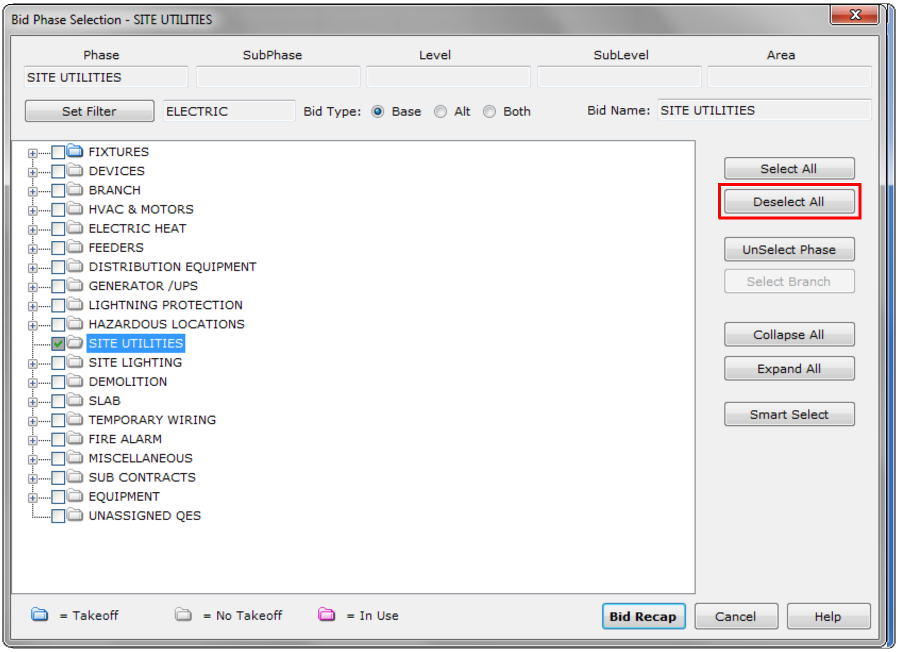
2. In **New Bid Name:** type SITE UTILITIES and click OK. The bid fields are copied and the Top Sheet tab displayed with the new bid name in the Bid Selection drop-down list as shown in Figure 1-113. You can modify this bid without losing any of the original bid.

FIGURE 1-113. Bid Selection



3. You may have created the second bid to change the phases that are included. In this case we want to know the estimate for just SITE UTILITIES. Click the Top Sheet tab and select Phase Select button. This displays the *Bid Phase Selection* dialog box as shown in Figure 1-114.

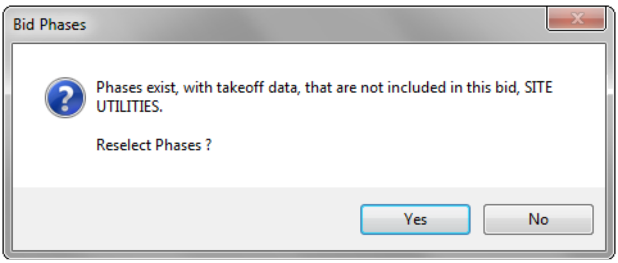
FIGURE 1-114. Bid Phase Selection dialog box



4. All phases that are checked indicates those phases are included in the bid. We want to bid just the Site Utilities phase. Click Deselect All to remove the check mark from all phases and then check the SITE UTILITIES phase as shown in Figure 1-114.

5. Click Bid Recap to return to the Top Sheet tab. A message indicates there are phases with takeoff that are not selected for the bid as shown in Figure 1-115.

FIGURE 1-115. Bid Phases pop-up



6. Click No because we deliberately removed phases from this bid. This bid includes only the takeoff in the Site Utilities phase. You can see which phases are included in the selected bid anytime by clicking the Phase Select button.

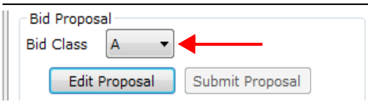
Note: Quotes are still included even if the phase they are assigned to is not. Make sure you check the quotes tabs and deselect any quotes you do not want included the new bid.

Create the Bid Proposal

Bid Proposal is the formal document you submit to the general contractor or your customer that documents your intention with regard to this project. The proposal is formated with a template that you select from the drop down list of proposal formats. You can add and modify the templates in Maintenance, so any standard text is already in each proposal you write. For now we will use the default template that is supplied with the software and edit directly in the copy for this job. Before you can submit the Bid Proposal, you must edit and save the proposal template for each Bid Class you are using. Since time is short when writing bids, it is a good idea to edit the Proposal *before* the day the bid is due to ensure the wording and specifications are correct.

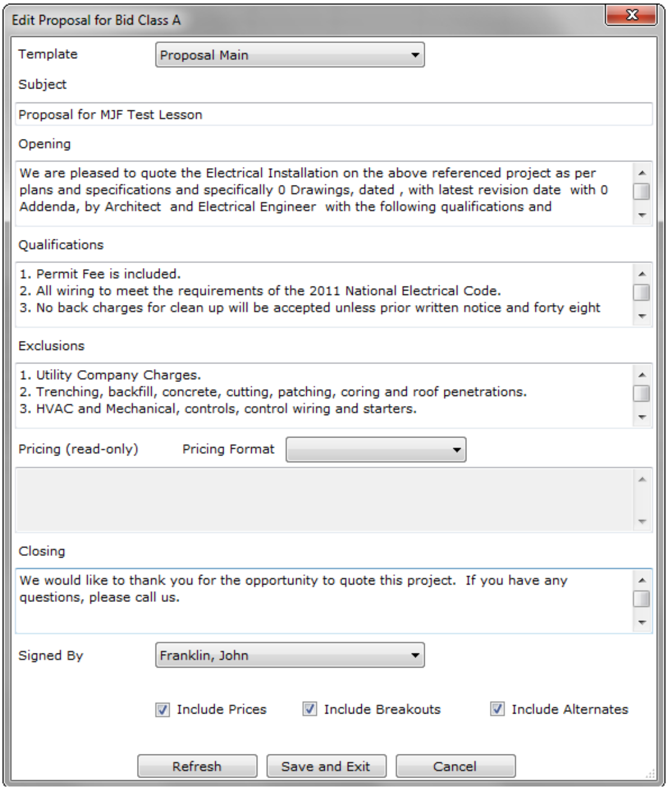
Bid Class is a definition you apply to a class of contractors or customers that reflect your assessment of their ability to keep projects running smoothly and on time and on budget. In general terms a good-better-best scenario. The Best contractors are those you prefer working with and you rate the rest by comparison in the Bid Class types assignment. You may apply a discount to the Best, and not as much to the other Bid Classes and the percentage adjusts the final bid amount based on the class. The default class for all new companies is Class A. Setting the Bid Class is found in **Companies/Contacts** on the General tab. See Online Help for more information on Bid Classes. Ensure Bid Class is set to **A** as shown in Figure 1-116.

FIGURE 1-116. Bid Proposal - Bid Class



1. From the Top Sheet tab, click Edit Proposal button. This displays the *Edit Proposal for Bid Class A* dialog box as shown in Figure 1-117.

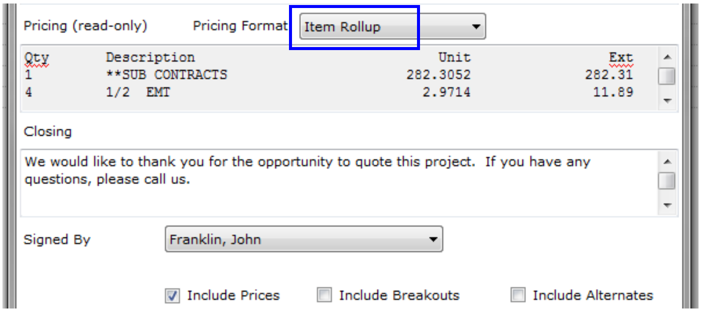
FIGURE 1-117. Edit Proposal for Bid Class A dialog box



The system uses the default Proposal Mail in the **Template** drop-down list. If you have other proposals created you can select them from this list. The proposal is a template that is maintained in <u>Maintenance/Communication/Bid Proposal</u> tab. You can add templates creating specific types of proposals and select the correct one at bid time. The proposal can also be edited here to customize this bid. The section labeled **Pricing (read-only) Pricing Format** has selectable presentation options to include Rollup values in the Bid. Rollup is an advanced topic that is covered in our training sessions and the Online Help. Use the drop-down list and select one of the options to see the results displayed in the Pricing section. This section is read-only, so you cannot change it other than by using the drop down control.

2. You can also choose to include the individual Pricing, Breakouts and Alternates by using the check boxes at the bottom of this dialog box. Different selections will change the displayed listing below <u>Pricing (read-only)</u>. Change the Pricing, Breakout, Alternate options and select different Pricing Formats to see the information supplied with the options. Select the option to Include Prices and Item Rollup and click Save and Exit. Refer to Figure 1-118.

FIGURE 1-118. Pricing display

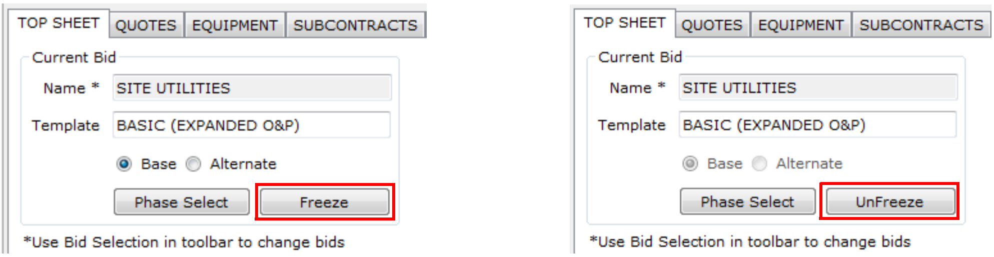


3. This returns you to the Top Sheet tab. Before you can submit the bid, it must be *frozen*.

Frozen Bids

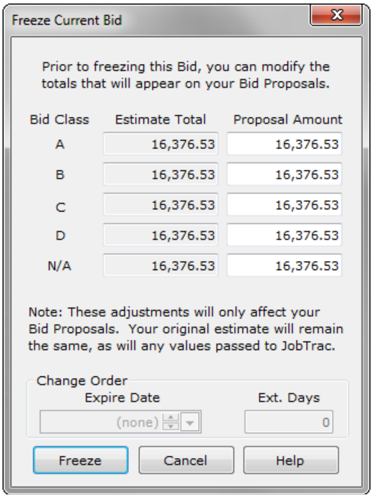
4. When you have completed a bid and you want to prevent any further changes, you can *freeze* the bid. Select the **Base Bid** again and then click the Freeze button as shown in Figure 1-119.

FIGURE 1-119. Freeze / Unfreeze button



5. This displays the *Freeze Current Bid* dialog box as shown in Figure 1-120. Confirm that the amounts and totals are correct. Click Freeze. The label on the button on the Top Sheet now displays Unfreeze as shown in Figure 1-119.

FIGURE 1-120. Freeze Current Bid dialog box



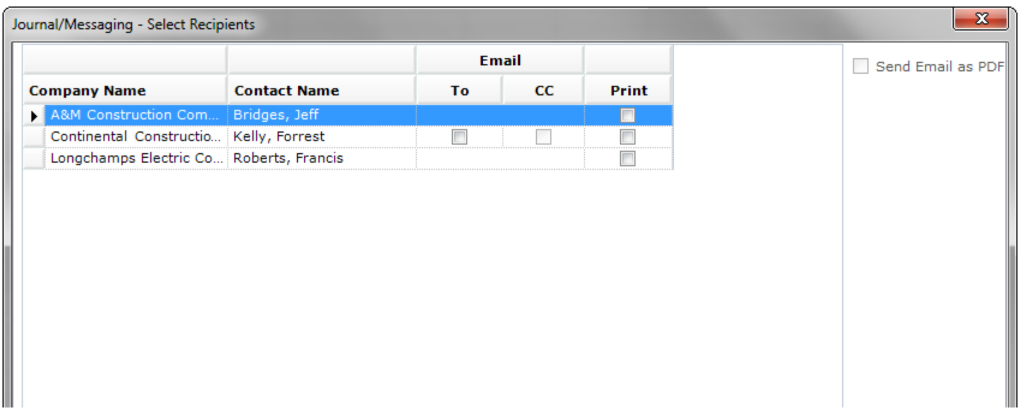
6. Most often you want to submit a *rounded* bid price. This dialog box allows you to edit the value in the Proposal Amount field. This is the amount that will be printed on the Bid Proposal. Bid Class is a feature that allows you to *classify* companies and submit a bid to different class suppliers.

7. When the Top Sheet is displayed again, the ability to edit the bid is disabled. You will not be able to make changes to a frozen bid. You can return to Takeoff and continue to add items to the estimate, but this frozen bid will not change. You can unfreeze the bid at any time by clicking the Unfreeze button. Then any new items added to phases already included in the bid can be updated. To update the bid with all the information currently in the Takeoff, click the Recalculate Bid button on the Toolbar.

Submit a Bid

8. Click **Submit Proposal**. The *Journal/Messaging - Select Recipients* dialog box is displayed as shown in Figure 1-121.

FIGURE 1-121. Journal/Messaging - Select Recipients dialog box



9. This dialog box lists the companies and contacts selected for the Bid Class. Check the **Print** option for one of the contacts. If you entered your email address for one of the listed contacts, check **To Email** for that contact. Click Next.

Note: To email the proposal, an email must be assigned to the recipient and you your email set up in maintenance. See Maintenance/Email Setup/Settings.

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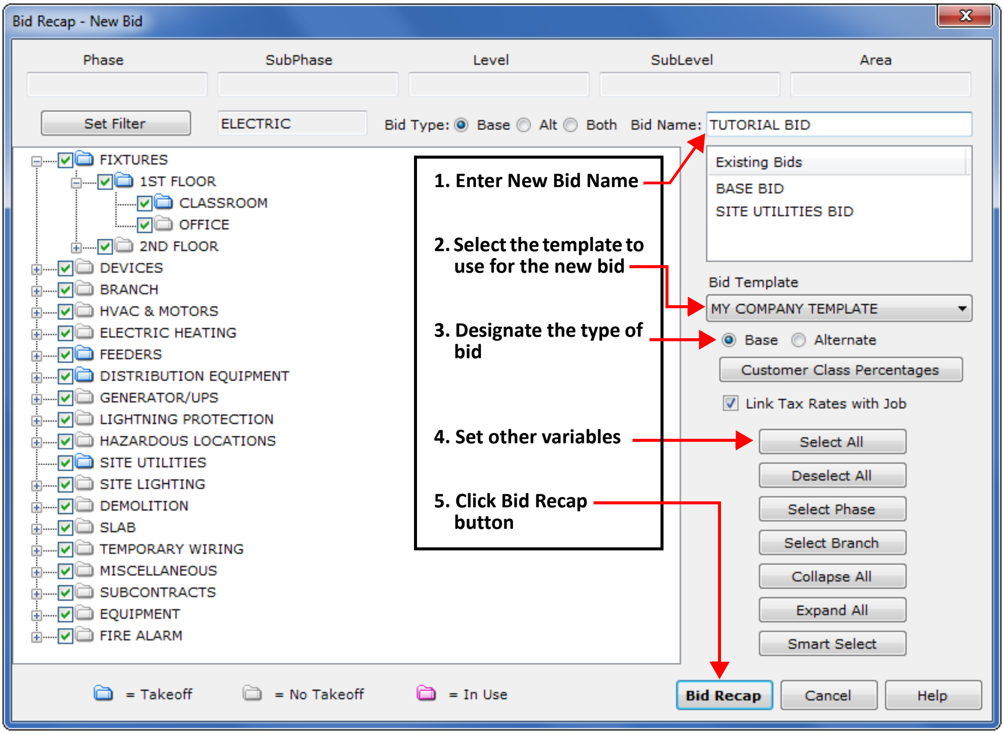
10. The *Message Attachments* dialog box is displayed. It allows you to attach documents from any location on your network or your computer that you want to include with the proposal. Click Done.
11. The *Preview* dialog box is displayed. First the email preview (if you selected that option) and the **Print** preview.
12. Click OK on the email Preview and/or close the Print preview. Click OK to the processing complete message. If you sent yourself the proposal via email, check your account to see how the proposal appears as an email message. The Proposal sent will be recorded in the Journal Messaging Center for this estimate.

Create a New Bid From a Different Template

We saw how to copy bids, now we will create a new bid using the template we just created.

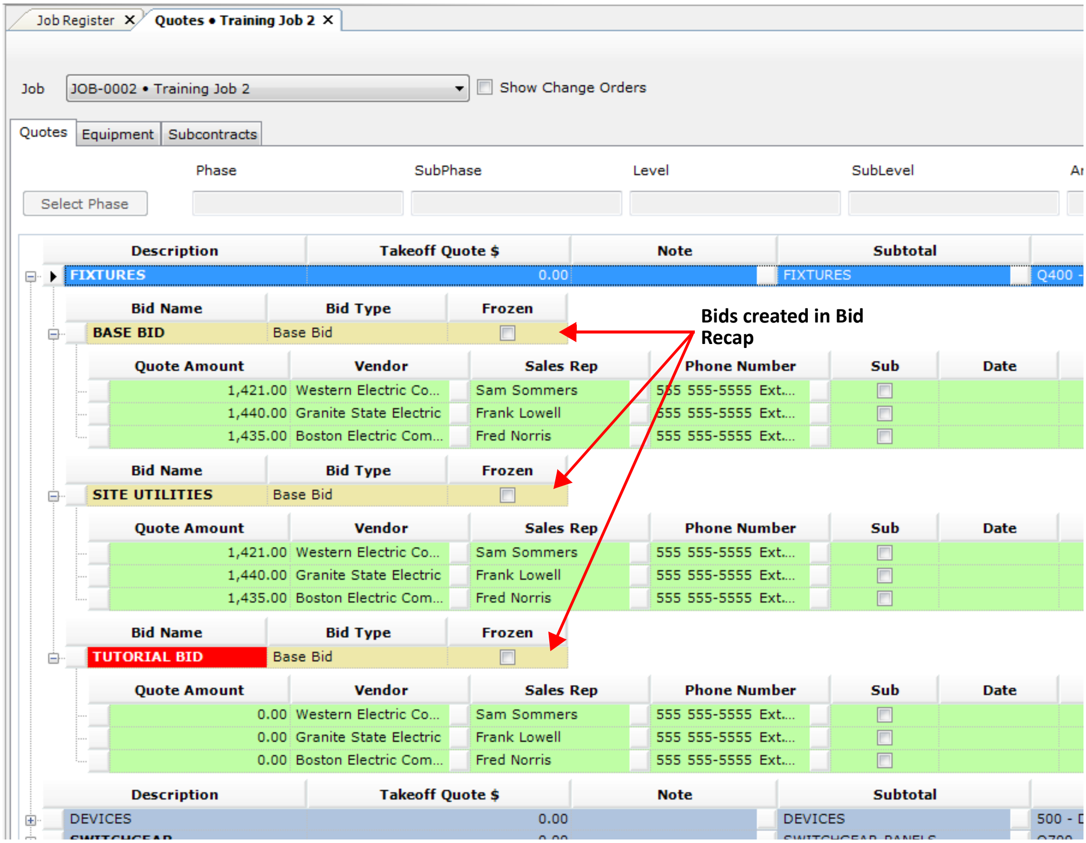
1. Click the **Sidebar** menu and select Bid Recap.
2. Click the Finish button for the Incomplete Items.
3. On the Top Sheet tab, select the first bid we did (we called it Base Bid) then click the New Bid button on the Toolbar. The *New Bid* dialog box is displayed as shown in Figure 1-122. The Phase Tree is displayed with all phases selected.

FIGURE 1-122. New Bid dialog box



4. In **Bid Name** field, type a new name for your bid, for example, TUTORIAL BID.
5. The **Bid Template** field lists all the bid templates. Select a Bid Template from the **Bid Template** drop-down list and click Bid Recap.
6. The *New Bid* dialog box closes and you are on the Top Sheet tab again. The first thing you will notice is that there are no quote amounts. The Copy Bid function includes the quote amounts; the New Bid function does not. When you open the Quotes tab, you will see the same vendor records but the amounts will be set to 0.00. To maintain the values across all your bids, click Online Help.
7. Open the **Takeoff Quotes** section again. What you will notice is that in Takeoff Quotes you can see all 3 bids you created as shown in Figure 1-123.

FIGURE 1-123. Quotes tab



Each bid can have different quotes assigned, different values for the quotes and be assigned to different phases. In Bid Recap, you are working in a specific bid and you see just the quotes for that bid. In Takeoff Quotes you can view all bids at the same time.

Bid Reports

There are a variety of reports that you can run from the Toolbar by clicking the **Print** button. Try running some of these reports now to get an idea of the kinds of reports that will work best for you. See the Online Help for more information on the content of these reports.

Bid Recap Review

In Bid Recap you finished the data entry for the bid. The tabbed windows organize the information so you can make sure you have completed all phases of the bid. You entered values for labor rates, indirect labor items, overhead and profit. In this lesson, we made changes in Bid Recap which means these changes affected only the bid for this job.

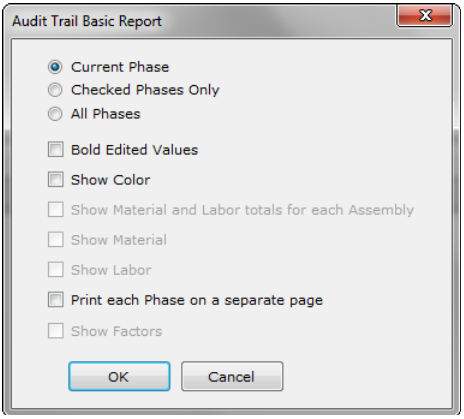
We recommend you try creating different bids, using different templates and compare the results. You may find that one bid template will work for certain projects you undertake and yet another template type will be appropriate for yet other projects.

Lesson 9 — Reports

IntelliBid is delivered with a wide variety of reports to assist an electrical contractor with managing his estimates. Each step in the bid preparation process, Job Registration, Takeoff, Summary and Bid Recap have a large selection of reports that can be used to analyze the information on the projects they are working on. Explore the menus on the main windows to see other reports. Online Help has more information on the reports and what they cover.

1. Click the Takeoff tab (if it is still open, otherwise click the Takeoff button on the Sidebar menu). We are going to look at the items we took off in the FEEDERS phase. (Lesson 3 “Feeders” on page 1-37)
2. Click the arrow next to the Print button on the Toolbar at the far right. You should see a list of reports. Select Audit Trail Basic. The *Audit Trail Basic Report* dialog box is displayed as shown in Figure 1-124.

FIGURE 1-124. Audit Trail Basic Report dialog box



3. Some reports are grouped by phase. These reports give you the choice of reporting on only the phase you are currently working with or including all the phases for this job. You can also choose to show any numbers manually edited in bold and print the reports in color if you have a color printer. The disabled check boxes are used for other reports. These allow you to choose if you want material and labor on the reports or not. For this exercise we are looking at the current phase. Click OK to generate the report.

Note: It may take a minute the first time Crystal Reports generates a report in your session. After the first report, initiating additional reports should be quicker.

4. The **Audit Trail Basic Report** opens in a preview window. Click Print to send the report to the printer. Close the print preview window.
5. Select **Takeoff**. The *Takeoff Report* dialog box is displayed. Select Show Material, Show Labor and click OK. The Takeoff Report opens in a preview window. You can print this report or close the window.

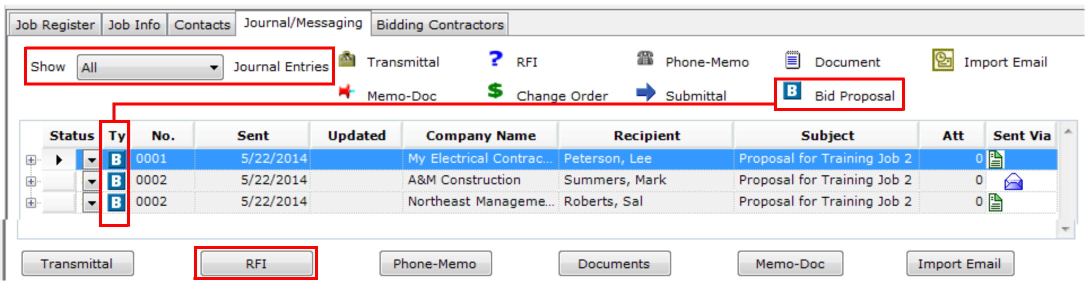
Lesson 10 — Journal/Messaging

Part of the estimate process is communication with other parties to the estimate and recording those transactions in a single location with each Job for later review. Journal/Messaging provides the tools to send RFIs, Transmittals, and memos via email to any contact you added to the job. You may include attachments to email or print the message for mailing. In addition, email responses received via Outlook and other email services can be imported and replied to for maintaining the communication trail.

The process to create a message is the same for each type of message, so we will use an RFI example. The format for each type of message is based on a master template. Each template can be customized for your business. You will want to read about the Message templates in the Online Help (click ? to launch). From the Table of Contents, select **Maintenance** and then the **Communications** topic under Preferences or locate Templates in the Online Help Index.

1. Click **Jobs** and select a job from the upper grid. Click the Journal/Messaging tab as shown in Figure 1-125. The **Show Journal Entries** drop-down list filters the messages by type. At the bottom of the window are the message type buttons. We have already created a Bid Proposal in Bid Recap which is shown in Figure 1-125.

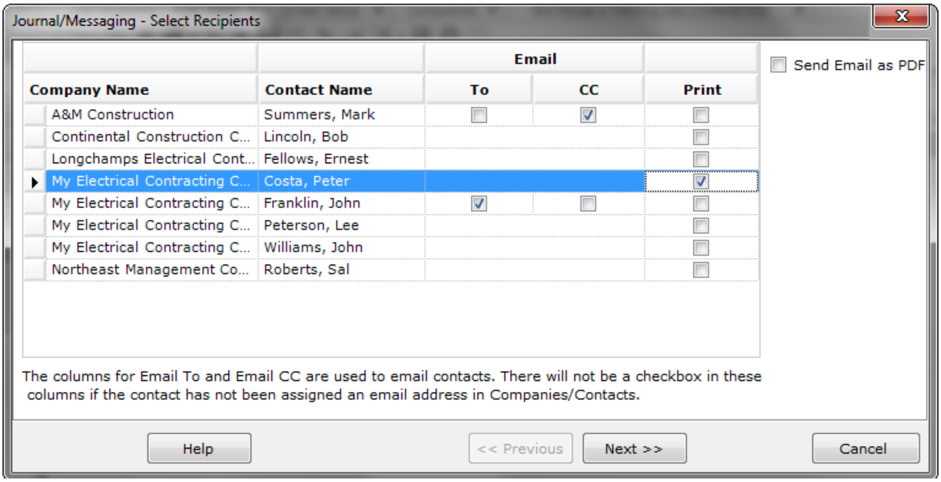
FIGURE 1-125. Journal/Messaging tab



2. Click the RFI button to send an Request for Information. The *Select Recipients* dialog box is displayed as shown in Figure 1-126 and lists the contacts included on the Jobs Contacts tab.

3. Email check boxes appear for any contacts with an email address. If you have added your email address to your contact record in Companies/Contact, check your name for Email and Print. Click Next.

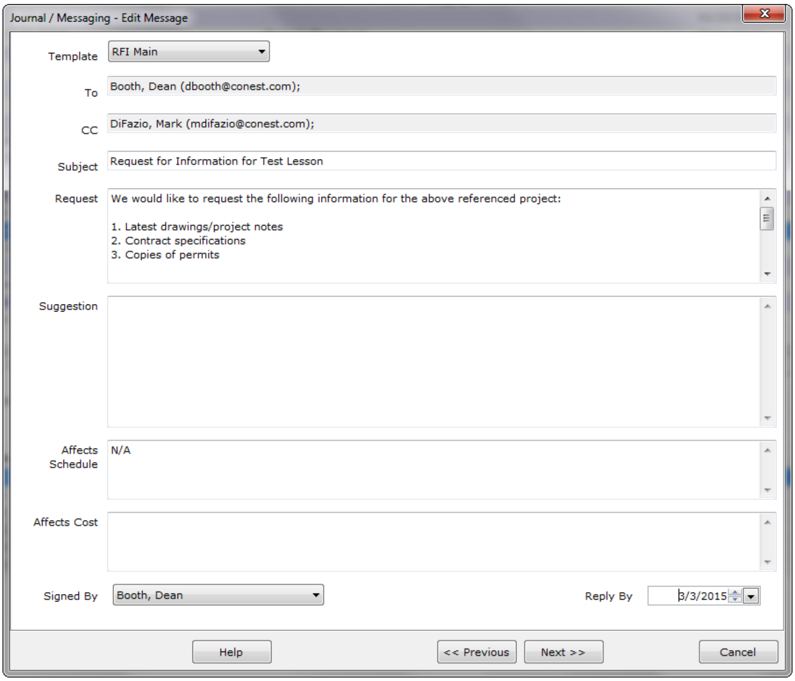
FIGURE 1-126. Journal/Messaging - Select Recipients



Note: The Email PDF option retains the formatting for message types like Transmittals although you can use it for any communication to email a .pdf version of the message.

4. The *Edit Message* dialog box is displayed as shown in Figure 1-127.

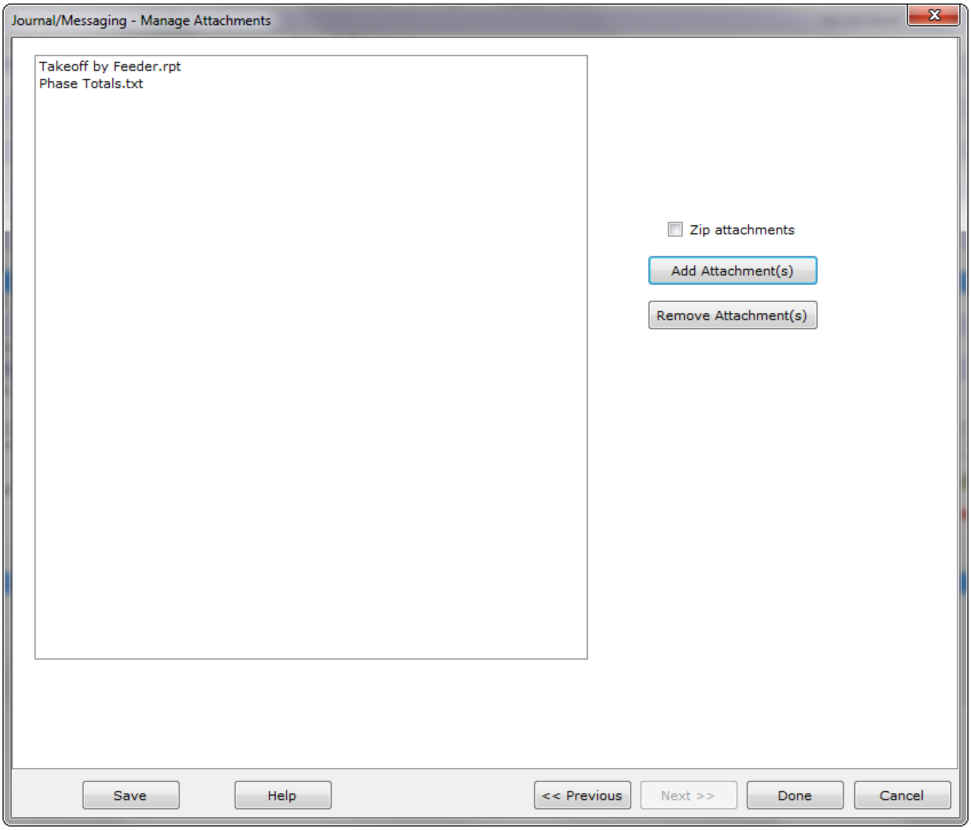
FIGURE 1-127. Journal/Messaging - Edit Message



5. You may use the default Template, RFI Main, or if you've added your own, click the drop-down to select the template. You can edit both the subject and the message in the dialog boxes. If you have a specific format for your RFIs, you can create a new RFI template in Maintenance and then use that template for RFIs. Review the Online Help for instructions on modifying and adding templates.

6. Fill in a Suggestion and when the message is complete, click Next. The *Manage Attachments* dialog box is displayed as shown in Figure 1-128.

FIGURE 1-128. Journal Message - Attachments



7. The *Manage Attachments* dialog box allows you to attach files to the email message. The attachments are not printed if you choose the Print option. Click Add Attachments and navigate to the file you want to attach. You can select multiple files by pressing the Ctrl key while selecting file. When you close the navigation window, the files you chose will be shown. To remove files from the attachment list, select the file and click the Remove Attachments button. Click Done.

8. The *Preview* dialog box is displayed and shows the email to be sent. Click OK to send.

9. A Crystal Report of the message is displayed as shown in Figure 1-129. To print, click the Print Report button.

FIGURE 1-129. Report / Message

My Electrical Contracting Company
592 Harvey Road
Manchester, NH 03103
Phone: 555 555-5555

SampleCo
Power & Service

My Electrical Contracting Company
592 Harvey Road

Manchester, NH 03103

Attention: Peter Costa

RFI #: 1

22 May 2014
Job ID: JOB-0002

Request for Information for Training Job 2 RFI-0001

Request: We would like to request the following information for the above referenced project: 1. Latest drawings/project notes 2. Contract specifications 3. Copies of permits
Affects Schedule: N/A
Affects Costs: **Please Respond By:** 05/30/2014

Sincerely,

John Franklin

My Electrical Contracting Company

Page 1 of 1

10. The Journal/Messaging area lists the RFI you just sent as shown in Figure 1-130. Check your email account for the email message.

FIGURE 1-130. RFI Report sent

Job Register | Job Info | Contacts | Journal/Messaging | Bidding Contractors

Show: All — Journal Entries: Transmittal, RFI, Phone-Memo, Document, Import Email, Memo-Doc, Change Order, Submittal, Bid Proposal

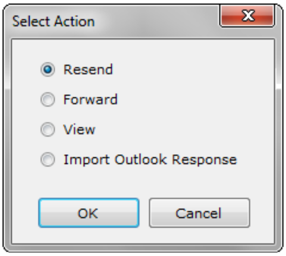
Status	Ty	No.	Sent	Updated	Company Name	Recipient	Subject	Att	Sent Via
	?	0001	5/22/2014		A&M Construction...	Summers, Mark...	Request for Information f...	0	
	?	0001	5/22/2014		My Electrical Contrac...	Costa, Peter	Request for Information f...	0	
	B	0001	5/22/2014		My Electrical Contrac...	Peterson, Lee	Proposal for Training Job 2	0	
	B	0002	5/22/2014		A&M Construction	Summers, Mark	Proposal for Training Job 2	0	
	B	0002	5/22/2014		Northeast Manageme...	Roberts, Sal	Proposal for Training Job 2	0	

Transmittal | RFI | Phone-Memo | Documents | Memo-Doc | Import Email

The **Att** column lists the number of attachments that were included with the original message. The **Sent Via** column displays icons to indicate how the message was sent, i.e. print, email and pdf-formatted email.

11. You can resend this message to the original recipients, forward the message to other recipients or view the message by double-clicking the message in the grid. The *Select Action* dialog box is displayed as shown in Figure 1-131. Click OK to resend.

FIGURE 1-131. Select Action dialog box

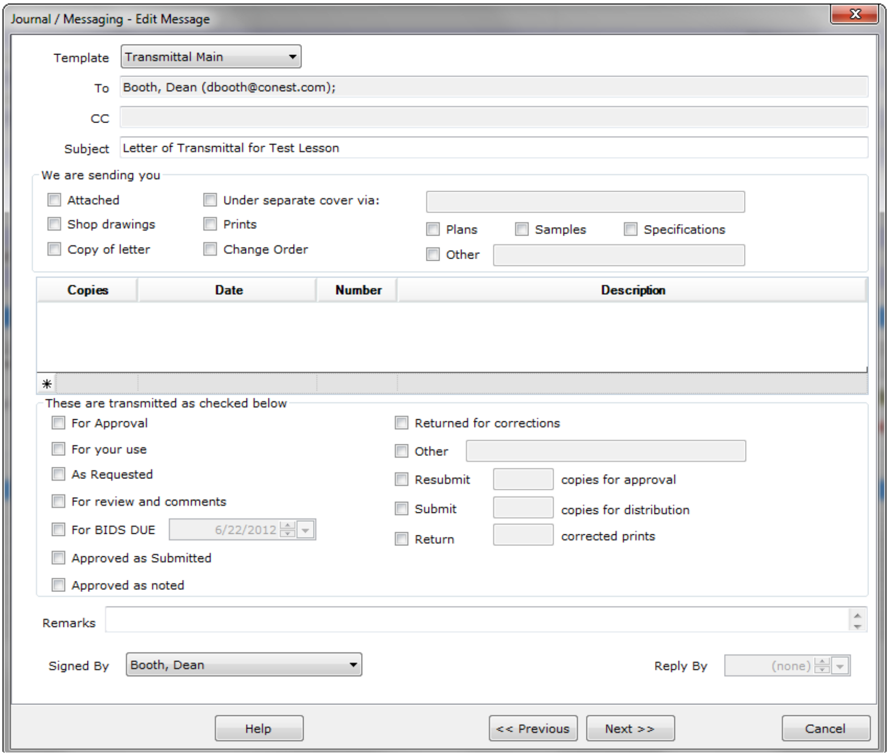


Note: The **Import Outlook Response** option imports selected email messages from your copy of Microsoft Outlook. We will not cover that here, but the information on using this feature is in the Online Help in the Journal Messaging section under Import Email Messages. Also, to enable the operation of the email portion of the Journal Messaging be certain to launch your email service prior to launching IntelliBid.

12. The *Resend Message* dialog box is displayed. Check the message for content and click Resend. A *Preview* window displays the message to resend. Click OK to resend message.

13. Click Journal/Messaging tab and select the Transmittal button. The *Edit Message* dialog box is displayed as shown in Figure 1-132.

FIGURE 1-132. Journal/Messaging - Edit Message

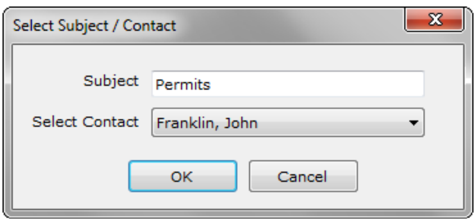


14. The Template drop-down lists Transmittal Templates you have created. The email recipients are listed and then the form you're sending. The Transmittal is an example of a form with pre-set fields. Make modifications by checking boxes and filling in the optional data. Click Next.

15. The *Manage Attachments* dialog box is displayed. Select an attachment and click Done. Close the *Preview* dialog box. When you receive this message in email, view the PDF format attachment.

16. You may have digital pictures or electronic drawing files or other kinds of documents that you want to keep with the job information. Click the Documents button to open a navigation window. Locate the file and click to select. The *Select Subject / Contact* dialog box is displayed as shown in Figure 1-133.

FIGURE 1-133. Select Subject / Contact



Type a Subject and choose a name from the Select Contact drop-down list and click OK. An entry for the Document is listed in the Journal Message grid. You can view this file at any time by double-clicking the row.

Lesson 11 — Phases

Phases define the tasks for the job. IntelliBid uses phases the same way you use takeoff sheets in manual estimating. In manual estimating you use separate *green* sheets for Branch, Feeders, or Fire Alarm and write up a list of materials needed to complete the task. In IntelliBidConEst Software Systems you use the Phases to organize your item lists for each of the different systems you need to account for. On a small job, you could estimate the entire job using just one phase. However, on a larger project, organizing your job into Phases has several *project management* benefits.

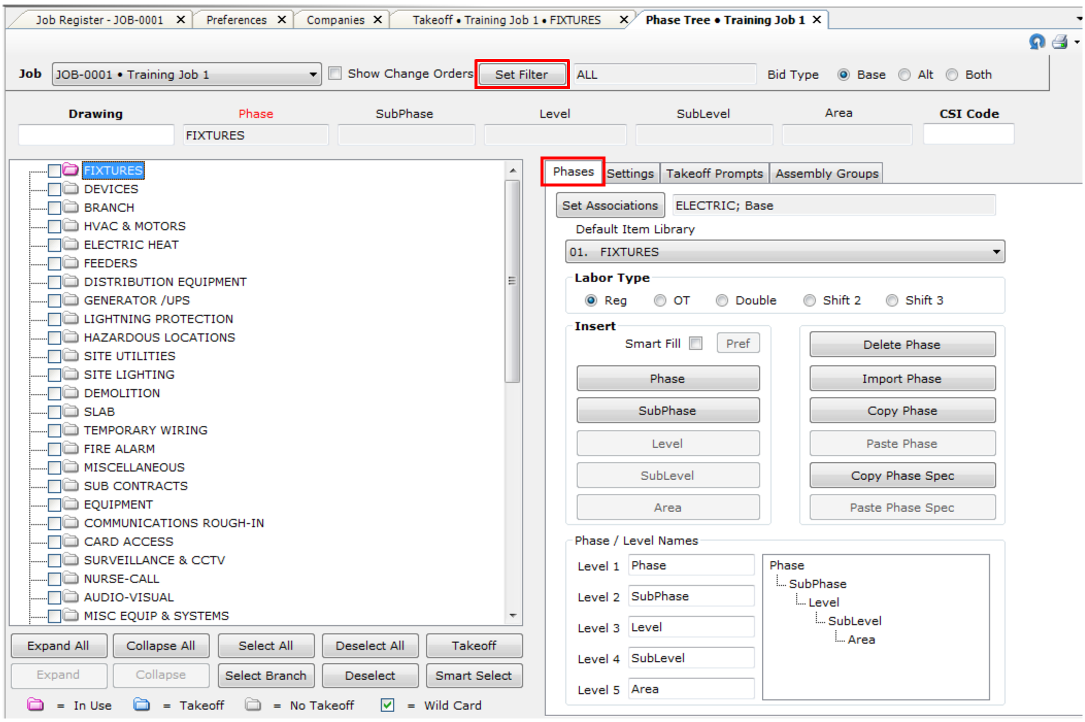
In this lesson we will work with the Phase Tree, modifying it for a job, changing the phase names and the phase tree structure itself.

Modifying Job Phases

1. Expand the Takeoff menu and select **Phase Tree/Job Spec**. The **Phase Tree/Job Spec** window is displayed as shown in Figure 1-134.

The Phase Tree is on the left. The tab labeled Phases contains many of the controls used to modify the phase tree. There are buttons below the Phase Tree for selecting phases and a legend.

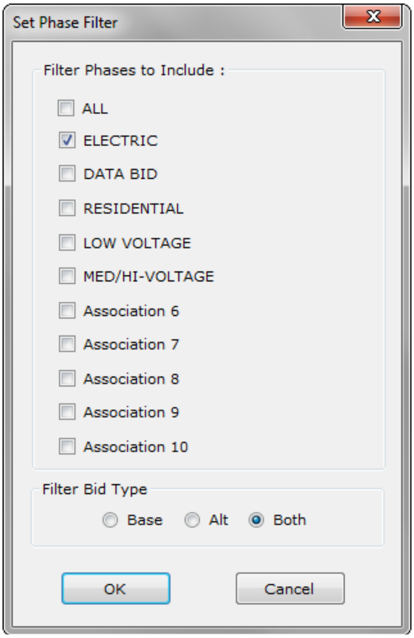
FIGURE 1-134. Phase Tree



2. The IntelliBid database is structured around these filters; Electric, Voice/Data, Residential, Low Voltage and Medium/Hi-Voltage as a way to present material items that relate to that type of electrical project. You can filter the database to display specific industrial segments, i.e. use the

Residential filter to see the material typically used in home construction projects or use the Voice/Data filter to see only material for structured cabling projects.The Set Filter button, when selected displays the *Set Phase Filter* dialog box as shown in Figure 1-135. The default is ALL.

FIGURE 1-135. Set Phase Filter dialog box



3. Uncheck **ALL** and select **ELECTRIC** for this exercise. The ELECTRIC filter is used for most commercial, industrial and institutional type projects. Filtering does not change any functions, it makes working in the Phase Tree more manageable. Click OK.

The Phase Tree is noticeably shorter. It now lists the phases for electrical work only.

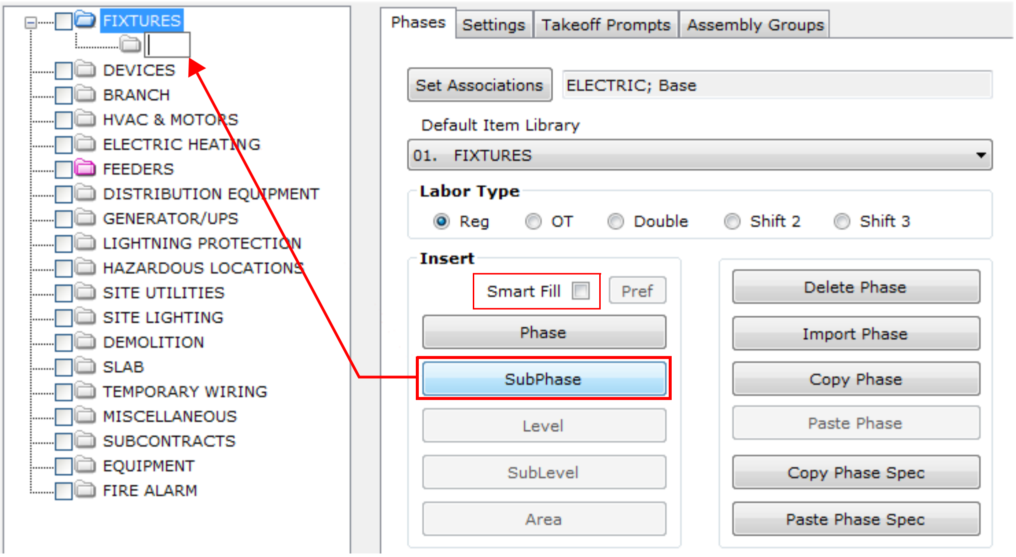
Note: Data cabling contractors can filter the Phase Tree by selecting DATA BID from this dialog box whereas contractors working on high voltage power projects would use the MED/ HI-VOLTAGE. These phases are specific to that type of work.

4. In the Phase Tree, click **FIXTURES**. To the right, the **Default Item Library** displays 01. FIXTURES. Click on the phase **DISTRIBUTION EQUIPMENT**. Notice 09. SWITCHGEAR & PANELS is displayed in the **Default Item Library** field. Each Phase is aligned with a default library that will be opened when you select that phase in Takeoff. You can specify another library for the existing phases or for any new Phases you create. Each library contains the logical items and assemblies for that phase of the job. You are not restricted to this library; it is just the starting point - you have full access to the entire database whenever you need it.

5. Click on the **FIXTURES** phase again.

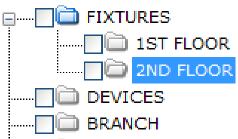
6. Each phase can be divided into subphases and levels. Click the SubPhase button on the right. This opens a new level under the FIXTURES phase with the cursor positioned ready for you to enter a name as shown in Figure 1-136.

FIGURE 1-136. SubPhase



7. Type **1st Floor** into the SubPhase field and press **Enter**. See Figure 1-137.

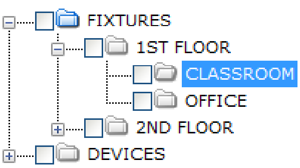
FIGURE 1-137. 1st and 2nd Floor SubPhases



8. Click SubPhase again and type **2nd Floor**. Press **Enter**. See Figure 1-137.

9. Select the **1st Floor** SubPhase and click the Level button. Type **Classroom** in the new level field as shown in Figure 1-138.

FIGURE 1-138. Classroom and Office Levels



10. Click Level again, type **Office** in the new level field and press **Enter**.

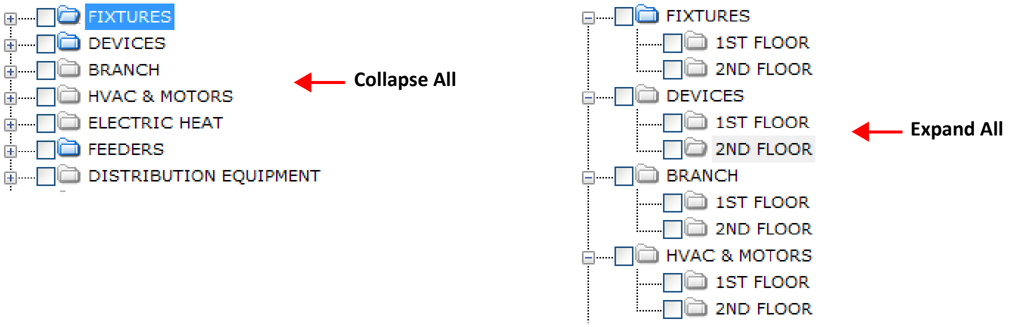
    Each level can have SubLevels and each SubLevel can have areas which adds 4 subdivisions of the phase itself. For a large project, building the phase tree alone could be a time-consuming task, but there is a feature to make this easier. If you are going to put Fixtures on the 1st Floor, chances are you will also need feeders on the 1st Floor and probably branch, distribution, etc.

11. On the right side of the window click the check box **Smart Fill**. See Figure 1-136.

12. Select **DEVICES** in the Phase Tree.

13. Click **SubPhase**, type **1st Floor** in the new level and press **Enter**. Every phase now has a + in front of it indicating there are levels below the phase. When *Smart Fill* is active, the SubPhase just entered is added to *every* phase as shown in Figure 1-139.

FIGURE 1-139. Smart Fill



14. Click **SubPhase** again and type **2nd Floor** and press **Enter**.

15. Click the Expand All button below the Phase tree. Each phase now has the 2 Subphases assigned as shown in Figure 1-139. FIXTURES already had Subphases named 1st and 2nd Floor, so the SubPhase is not added to that phase.

16. Click Collapse All to collapse the tree.

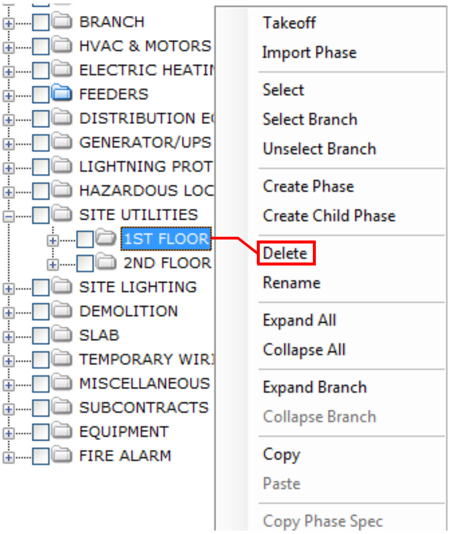
17. Click the + in front of BRANCH to display the Subphases and highlight the 1st FLOOR Subphases. Click the Level button and type **Classroom**. Now all 1ST FLOOR Subphases have a CLASSROOM phase.

18. Click the Level button again and type **Office**. All phases have the same subphases and levels.

19. Let's modify an individual phase. For example, we won't need 1ST and 2ND FLOOR phases for the site utility work. Refer to Figure 1-140.

    Uncheck **Smart Fill**. Expand SITE UTILITIES. Highlight 1ST FLOOR, click the right-mouse button and select **Delete** from the popup menu.

FIGURE 1-140. Modify Site Utilities



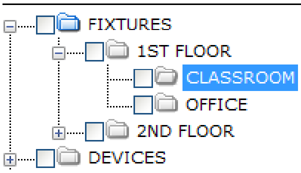
A message warns you the phase has subphases and asks you to confirm the action. Click Yes and the 1ST FLOOR SubPhase is removed from the SITE UTILITIES phase only. Do the same for 2ND FLOOR.

Note: If you do not uncheck **Smart Fill**, a second message warns that this action can potentially affect more than you intend. When Smart Fill is checked and you select Delete, the Subphases from **every** phase will be removed. This is a way to correct or change the entire tree, if desired.

Opening Takeoff From the Phase Tree

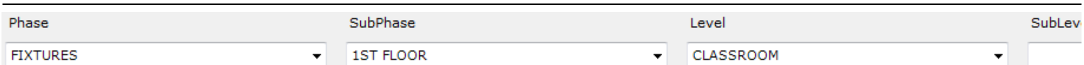
20. Highlight the *FIXTURES > 1ST FLOOR > CLASSROOM* phase as shown in Figure 1-141.

FIGURE 1-141. Fixtures > 1st Floor > Classroom



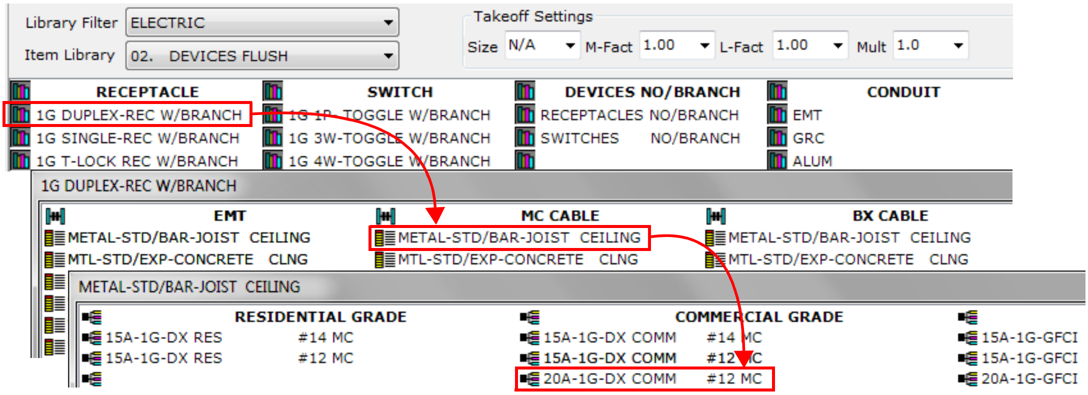
21. Open a Takeoff tab for this phase by either double-clicking the left mouse button, clicking the Takeoff button below the Phase Tree, right-click and select **Takeoff** from the pop-up menu or click New Takeoff in the Sidebar menu. When you return to the Takeoff window, the phase is displayed in the Phase fields above the Audit Trail as shown in Figure 1-142.

FIGURE 1-142. Phases in Takeoff



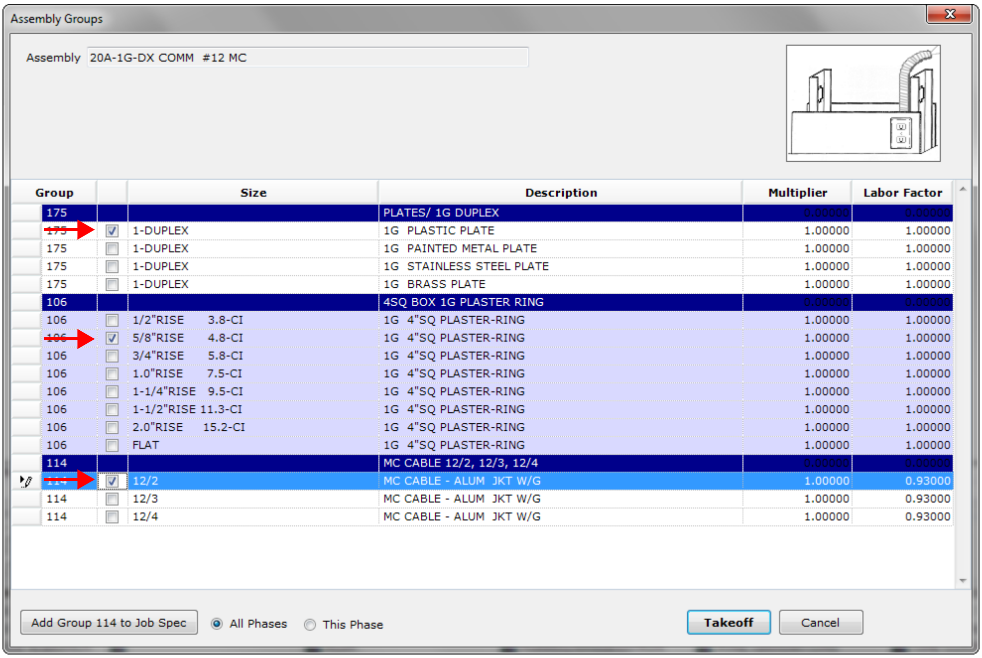
22. Click the **Phase** drop-down menu and select DEVICES. Make the following selections:

FIGURE 1-143. Takeoff selections



23. The *Assembly Groups* dialog box is displayed as shown in Figure 1-144.

FIGURE 1-144. Assembly Groups dialog box



24. Select **1G Plastic Plate**, **5/8" Rise 4.8-CI** and **12/2 MC Cable** and click Takeoff. The *Quantity* dialog box is displayed.

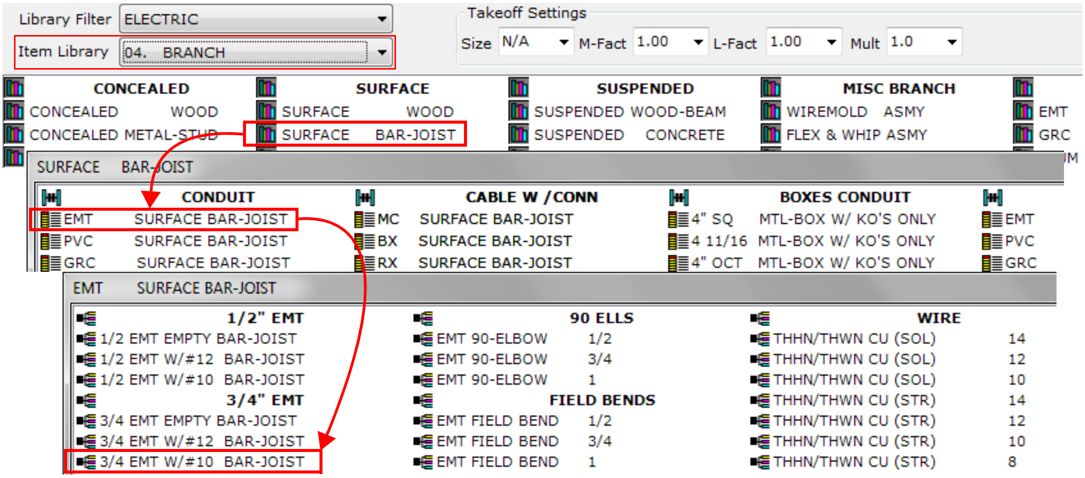
25. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **50** for DEVICE BOXES
- **15** for 2-WIRE CBL AVG LEN

26. Close **Metal-Std/Bar-Joist Ceiling** and **1G Flush Recept W/Branch** windows.

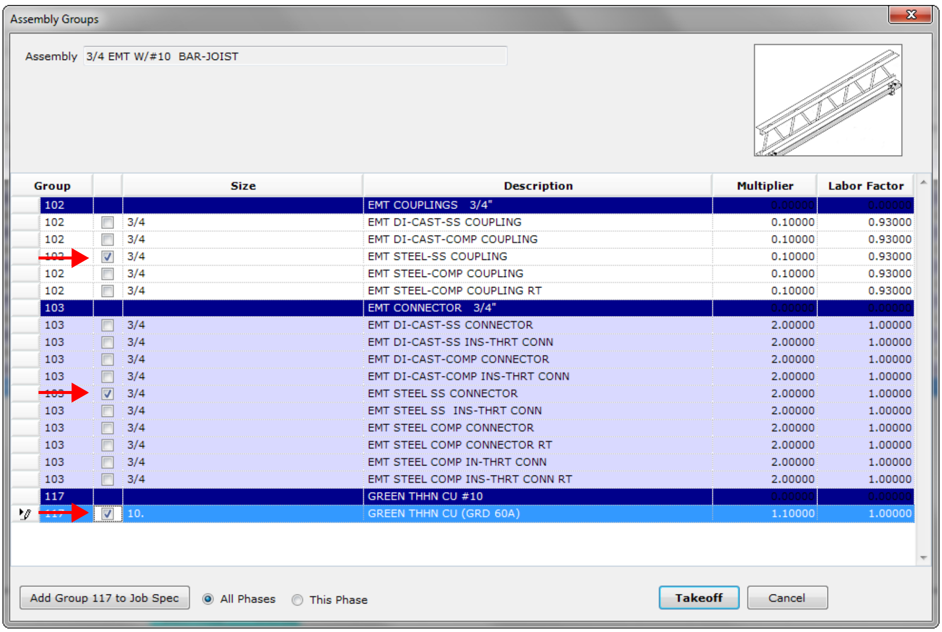
27. Change **Item Library** to <u>04. BRANCH</u> and make the following selections: Refer to Figure 1-145.

FIGURE 1-145. Takeoff Surface Bar-Joist, EMT Bar Joist & 3/4 EMT Bar Joist



28. Select **3/4" EMT Steel-SS Coupling**, **3/4" EMT Steel-SS Connector** and **Green THHN CU** and click Takeoff.

FIGURE 1-146. Assembly Groups - 3/4" EMT



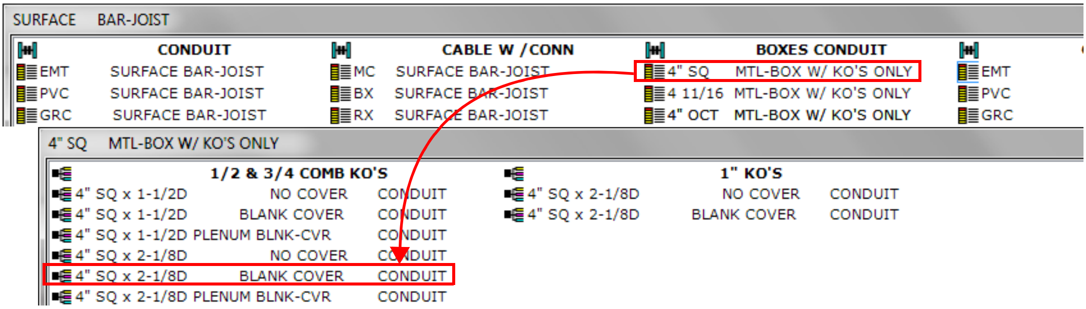
29. The *Quantity* dialog box is displayed. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

- **170** for CONDUIT LENGTH
- **6** for SEGMENTS

- **5** for WIRES (IN PULL)

30. Close **EMT Surface Bar-Joist** window only. Select the following: Refer to Figure 1-147.

FIGURE 1-147. Takeoff 4" SQ MTL Box & Blank Covers



31. The *Quantity* dialog box is displayed. Enter the following values. Press **Enter** or click Enter Prompt after each entry.

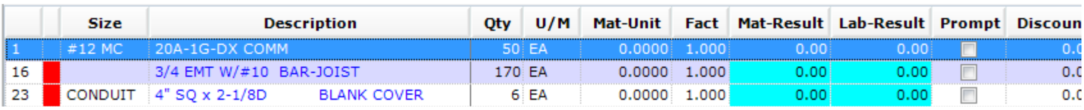
- **6** for BOXES

32. Close all library windows.

Copy, Paste & Replace Items

33. On the Toolbar, click the Collapse / Expand Assemblies button. The Audit Trail collapses the takeoff to 3 rows as shown in Figure 1-148.

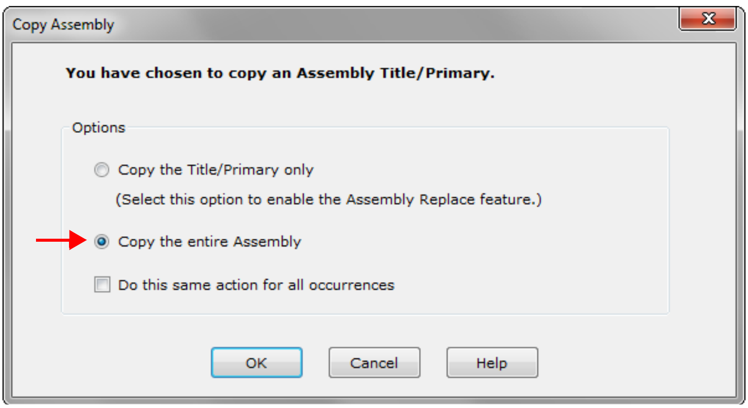
FIGURE 1-148. Collapse Audit Trail



	Size	Description	Qty	U/M	Mat-Unit	Fact	Mat-Result	Lab-Result	Prompt	Discoun
1	#12 MC	20A-1G-DX COMM	50	EA	0.0000	1.000	0.00	0.00		0.0
16		3/4 EMT W/#10 BAR-JOIST	170	EA	0.0000	1.000	0.00	0.00		0.0
23	CONDUIT	4" SQ x 2-1/8D BLANK COVER	6	EA	0.0000	1.000	0.00	0.00		0.0

34. Highlight the first row **#12 MC**. Right-click and select Copy from the popup menu or click the Copy button on the Toolbar. The *Copy Assembly* dialog box is displayed as shown in Figure 1-149.

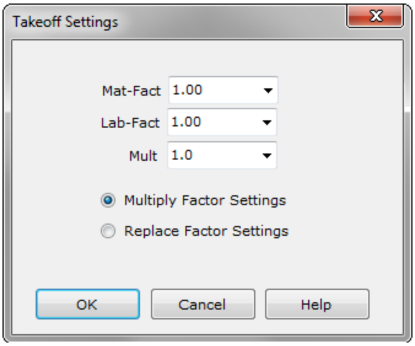
FIGURE 1-149. Copy Assembly dialog box



35. Ensure **Copy the entire Assembly** radio button is selected and click OK.

36. Change SubPhase to 1st FLOOR and level to CLASSROOM. Right-click in the Audit Trail and click Paste Insert or Paste Append. The *Takeoff Settings* dialog box is displayed as shown in Figure 1-150.

FIGURE 1-150. Takeoff Settings dialog box



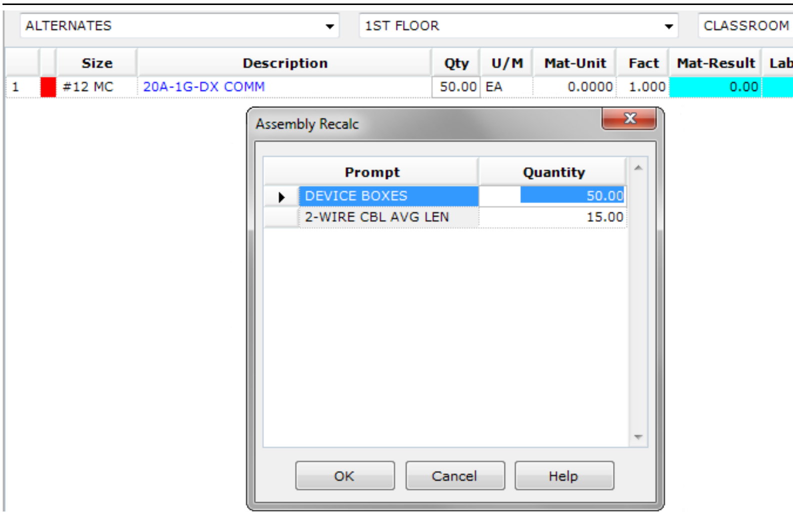
37. With the settings as shown in Figure 1-150, click OK. The #12 MC item is copied to the 1st FLOOR / CLASSROOM as shown in Figure 1-151.

38. Click the **Qty** column. The *Assembly Recalc* dialog box is displayed as shown in Figure 1-151.

39. On the Toolbar, click the Collapse / Expand Assemblies button. This will show all items and the quantity changes made.

40. Click **Quantity** for DEVICE BOXES and enter **70**. Click OK.

FIGURE 1-151. Assembly Recalc dialog box

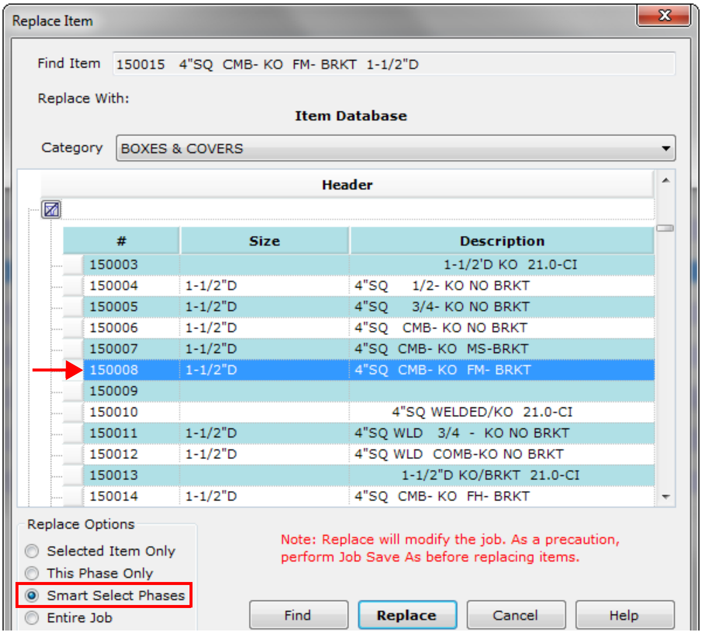


41. Paste into the OFFICE level using the same steps. Click **Quantity** for DEVICE BOXES and enter **80**. Click OK.

42. Click the Collapse / Expand Assemblies button.

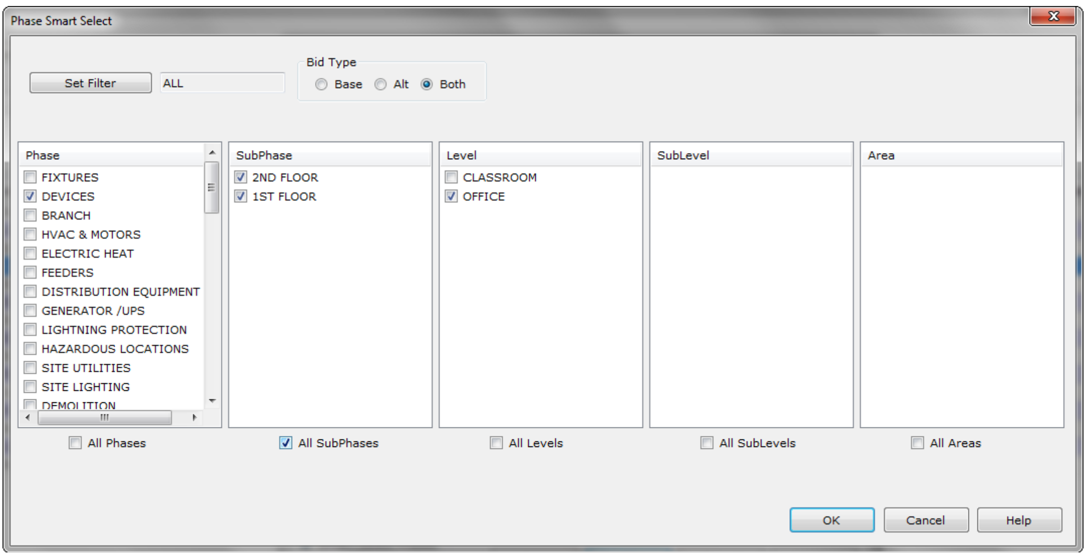
43. Highlight **4"SQ CMB** row, right-click and select Replace in the popup menu. The *Replace Item* dialog box is displayed as shown in Figure 1-152.

FIGURE 1-152. Replace Item dialog box



44. Expand the 4" SQ BOXES, scroll down to **1 1/2"D sizes** and select the item shown in Figure 1-152. In **Replace Options**, click Smart Select Phases radio button. Click Replace. The *Phase Smart Select* dialog box is display as shown in Figure 1-153.

FIGURE 1-153. Phase Smart Select dialog box



45. Uncheck **All Phases** and click the check box for **DEVICES**. In **Levels**, uncheck CLASSROOM. Uncheck **All SubLevels** and **All Areas**. Click OK. Observe your replacements in the Audit Trail.

Lesson 12 — Bid Templates

We have covered the steps to prepare an estimate and complete the bid by making changes in Bid Recap. The modifications in Bid Recap only apply to the bids in that job. Bids are based on templates and these templates can be modified so that when you go to Bid Recap, most of your work is already done.

This lesson will set-up a default template with values commonly used and do not change from job-to-job. We will discuss more details and options that make up the bid.

Note: As you work through these procedures, be creative with cost saving ideas. Apply local codes as they relate to the estimate and remember, your competitive edge as an estimator lies in your ability to find a more cost effective installation and to uncover design flaws.

Setting up Your Bid Template

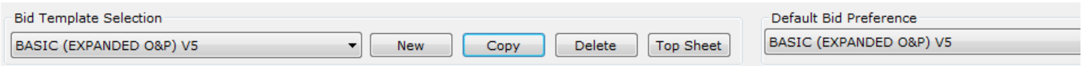
The Bid is the formal proposal you use to submit your final estimate to the customer. It includes the material, labor and equipment necessary to complete the job as well as your fixed costs, both direct and indirect, taxes, overhead and a profit margin. The bid template can be modified to store your fixed charges so when you are ready to bid a job, much of the work is done. The value in setting up Bid Templates is that your bids will be consistent, you won't forget to include the indirect costs and you won't need to re-enter the same information each time you start a new bid.

The software includes several different bid templates. You can directly modify these templates, however, it's a good practice to make a copy of the original bid as delivered with the software and apply your edits to that. This way you always have a *fresh* template to start with when you want to create a different template. Depending on your business, you may decide to create a template for the type of job, i.e. school, hospital, warehouse, or you may perform work in more than one state where the tax rates differ or for specific work such as government projects. Taking the time to prepare your bid templates for the types of electrical project you undertake will insure your bids are accurate and able to complete them in less time.

We will look at the Bid Templates and create a new template setting up a few values like hourly rates, profit percentages and overhead. You can use your own values instead of our examples.

1. On the **Sidebar** menu, click **Maintenance** and select Bid Templates.
2. A message warns you that structural changes can be detrimental to some of the processing and to be cautious when making complex changes to the templates. Click OK.
3. At the top left of the Bid Template window, there is a drop-down list labeled Bid Template Selection. The templates included with the software and any new templates you create are available here. We strongly recommend that you **always** copy an existing template when you intend to make changes, rather than modify the default templates or even ones you have created. This way, you can always go back to the original to create a new template. Default Bid Preference selects the bid that will be used as a default for all new jobs. You do have the option of changing this when you add a new job. The default template is BASIC (EXPANDED O&P) as shown in Figure 1-154.

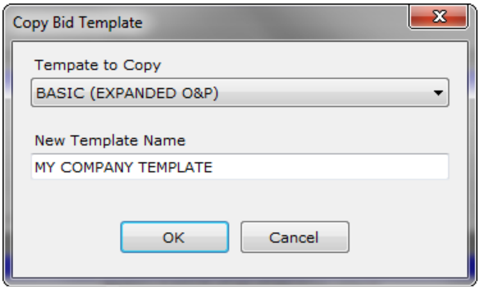
FIGURE 1-154. Default Bid Template - Basic (Expanded)



Copy the Template

4. We are going to create our own bid template by copying the BASIC (EXPANDED O&P) template (which stands for Expanded Overhead and Profit in the Final Price section of the template). Click the Copy button. The *Copy Bid Template* dialog box is displayed as shown in Figure 1-155.

FIGURE 1-155. Copy Bid Template dialog box



The Templates to Copy drop-down list provides the following template selections.

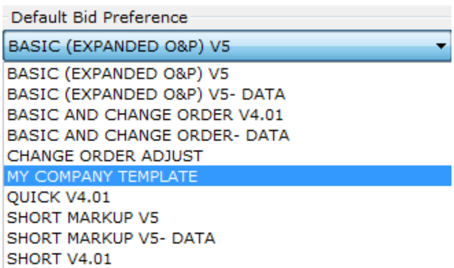
- **QUICK** — The simplest template form. It includes only Direct Labor, Indirect Labor, Direct Job Costs and Final Price sections. All labor classes are combined in one total including overtime and shift differential hours. Overhead and profit in this template are collapsed into a single line entry for each.
- **BASIC AND CHANGE ORDER** — Builds on the QUICK template and includes the entries for change order bids plus the Job Info section.
- **BASIC AND CHANGE ORDER - DATA** — Same as Basic and Change Order, except the Labor classes labels are changed. to reflect structured cable installations.
- **CHANGE ORDER ADJUST** — Allows for credits (negative values) in the takeoff that do not affect profit, overhead and tax calculations. This takes any credit values in the Takeoff and applies them to the Final Price tab as adjustments.
- **BASIC (EXPANDED O&P)** — This template is the same as the BASIC AND CHANGE ORDER except that it provides for a detailed breakdown of percentages associated with Overhead and Profit for the major categories: Materials, Quotes, Labor, Equipment, Subcontractors and Direct Job Costs. It also includes labor breakdown to the major labor classes, Foreman, Journeyman and 3 Apprentice classes.
- **BASIC (EXPANDED O&P) - DATA** — Same as Basic but the labor classes reflect voice/data labels,i.e. Technicians and Cable Installer.
- **SHORT** — Contains entries for the first 3 Labor Classes which makes it a little easier to use than the STANDARD template with all 10 labor classes. Otherwise, the SHORT template contains the same formulas and information as the STANDARD. This template should also be used when assigning Labor classes other than Regular to a Job Phase.

- **SHORT MARKUP** — Is the same as the SHORT template except it uses the Markup method to calculate overhead and profit; the SHORT template uses Margin. Look up *Margin* in the Online Help file index for a complete explanation of Margin vs. Markup.
- **STANDARD** — Is the most comprehensive template. Everything you need to bid is here with the calculations built in. In the Direct Labor breakdown it supports Regular time, Overtime, Double Time, Shift 2 and Shift 3 categories. When you set up your phase tree to account for phase(s) to be estimated for a labor class other than Regular time, you are required to use this Bid Template for those estimates. It also includes many more Indirect Labor classes than the other templates.
- **UNION** — Is a specialized template for union work. In the Direct Labor section it supports multi-year Journeyman and Apprentice classifications for assignment for jobs that require the electricians YEAR designation (and associated pay rates and dues). This template should also be used when assigning Labor classes other than Regular to a job Phase.

5. Select BASIC EXPANDED O&P from the drop-down list in Figure 1-155. In **New Template Name** type *My Company Template* and click **OK**. The new bid name is displayed in the Bid Template Selection fields but now any changes you make will be to *My Company Template*, not the original template.

6. We want to use this as the default template in the *New Jobs* dialog box. Select the new template from the Default Bid Preference drop-down list as shown in Figure 1-156.

FIGURE 1-156. My Company Template



Note: You can create as many bids as you like for the same job in Bid Recap. It is a simple task to create a new bid using any of the other bid templates.

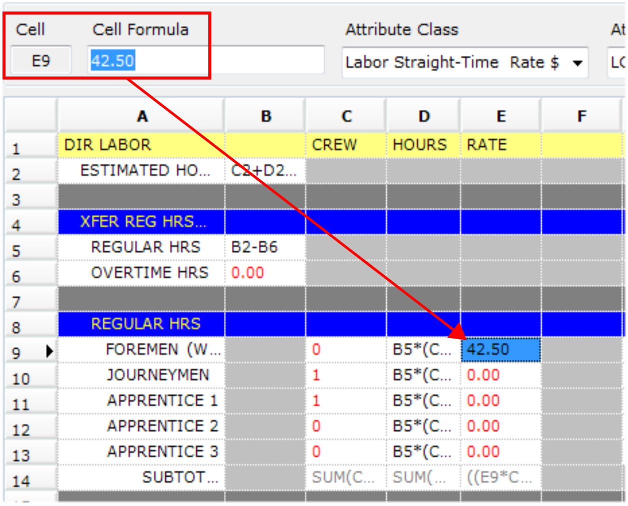
Now we want to modify this template so we don't have to enter the labor rates and standard direct and indirect costs every time we create a bid. We will be working in the grid. The rows with a yellow background are the tab headings. The first row in the grid is labeled DIR LABOR. The first 5 column tab headings (DIR LABOR, INDIR LBR, DJC, FINAL PRICE, & JOB INFO) are standard for all bids. The rest of the tabs are defined in the template.

Direct Labor

Direct Labor refers to the direct costs of labor: hourly rates, burden and fringe. To update these values, you will need to know the rate you pay your employees. The template lists Foremen, Journeymen and Apprentices, but these can be edited. There are columns to enter burden% (percentage due for FICA, Unemployment, Workmen's Compensation, liability insurance, etc.) and fringe hourly costs (benefits package, holidays, vacation, health insurance, etc.) separately or these can be combined with the pay rate and entered into the column for Rates. Consult with your Accounting Department to obtain the information you do not have.

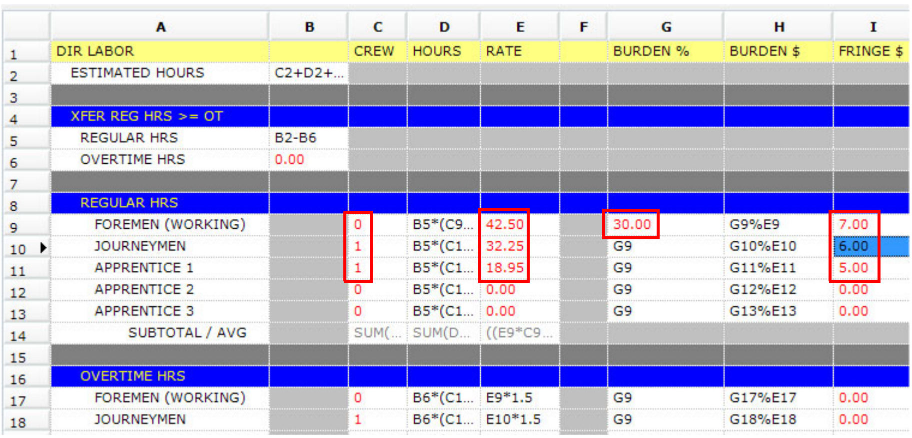
7. Editing values in the template is performed in the **Cell Formula** field. This field is where you change formulas, text and numeric values. To enter an hourly rate for the Foreman**,** click (E9) cell and observe the **Cell Formula** field. You are automatically in edit mode and the cursor is positioned in the **Cell Formula** field. Enter a value (42.50) and tab or click out of the **Cell Formula** field and the value appears in the (E9) cell as shown in Figure 1-157.

FIGURE 1-157. Cell Formula - editing



8. Click cell (E10) and enter the Journeyman's straight time labor rate of **42.50**. Tab or click out of the Cell Formula box. Cell E10 now has the Journeyman rate. Add an Apprentice rate of **18.95**. Refer to Figure 1-158.

FIGURE 1-158. Enter Labor Burden% & Fringe $ rates



9. Column G contains **Burden %** which is the percentage due for FICA, Unemployment, Workmen's Compensation, liability insurance, and Federal unemployment. Click (G9) cell and enter 30.00. The percentage of burden we determined is our cost.

10. **Fringe** items are typically the benefits package for your employees, i.e., holidays, vacation, health insurance, etc. If you know your costs for Fringe and Burden, enter those values. Alternately, you can calculate the rate including burden and fringe and enter just that value in the Rate column.

11. We left the crew mix as is. If your jobs typically have the same crew, you can enter it now and modify it later in Bid Recap.

Indirect Labor

12. Scroll down to the yellow row labeled **INDIR LBR**. There are several entries for different functions that contribute to indirect labor; General Foreman, Truck Driver, Laborer, etc. Column B sets the number of hours and column D sets the rate charged. These hours are added to the job but not taken out of installation hours. Hours depends on the job, so we will leave that alone. Entering the rates normally used will save time later. When you create the bid, enter hours for any of the functions used and the bid will calculate the totals. Any function with 0.00 hours will not be included. You can combine all indirect costs into Miscellaneous Indirect Labor and ignore the rest of the components in this section or use this rate for special situations. Some contractors include the Burden and Fringe in their base rate. If you use this approach, put a value in **Rate** (column D) and leave **Burden%** (F) and **Fringe $** (H) at 0.00. This is known as your FULL RATE or LOADED RATE per hour. Refer to Figure 1-159.

FIGURE 1-159. Rate $ entries

	A	B	C	D	E	F	G	H	I
29	INDIR LBR	HOURS		RATE $		BURDE...	BURDEN $	FRINGE $	FULL R...
30	MISC INDIRECT LABOR	0.00		0.00		0.00	F30%D30	0.00	D30+H...
31	PROJECT MANAGER	0.00		44.50		F30	F31%D31	0.00	D31+H...
32	SUPERINTENDENT	0.00		38.00		F30	F32%D32	0.00	D32+H...
33	GENERAL FOREMAN	0.00		0.00		F30	F33%D33	0.00	D33+H...
34	FOREMAN	0.00		0.00		F30	F34%D34	0.00	D34+H...
35	DRAFTSMAN	0.00		0.00		F30	F35%D35	0.00	D35+H...
36	STOCKMAN / PURCHASING	0.00		0.00		F30	F36%D36	0.00	D36+H...
37	TRUCK DRIVER	0.00		19.00		F30	F37%D37	0.00	D37+H...
38	TRAVEL TIME	0.00		0.00		F30	F38%D38	0.00	D38+H...
39	MOBILIZATION LABOR	0.00		0.00		F30	F39%D39	0.00	D39+H...
40	AS BUILT DRAWINGS	0.00		0.00		F30	F40%D40	0.00	D40+H...
41	SAFETY	0.00		28.00		F30	F41%D41	0.00	D41+H...
42	ESTIMATING	0.00		36.00		F30	F42%D42	0.00	D42+H...
43	GUARANTEE	0.00		0.00		F30	F43%D43	0.00	D43+H...

Direct Job Costs

13. Scroll to the **DJC** row and enter any values that apply to your business. Column B is for quantity and column C is cost per unit. Normally, you set column C and D values in the Bid Template and leave column B values empty so they can be set for each job later in Bid Recap. Enter values for **Equipment Depreciation** and **Tools Expendable** as shown in Figure 1-160.

FIGURE 1-160. DJC (Direct Job Costs)

	A	B	C	D	E
47	DJC	QTY	COST/...	% OF...	TAX%
48	MISC DIRECT JOB COSTS		0.00		
49	SPECIFIED ALLOWANCES		0.00		
50	SPECIAL INSURANCE CHG		0.00		
51	EQUIPMENT DEPRECIATI...			.50	
52	TOOLS EXPENDABLE			.25	
53					
54	FIELD STORAGE (MONTH)		210.00		
55	OFFICE TRAILER (MONTH)		400.00		
56	FIELD OFFICE UTIL (MON...		55.00		
57	FIELD TELEPHONE (MON...		0.00		
58	FIELD TOILET (MONTH)		35.00		
59	TEMP FENCING (FEET)		7.85		
60					
61	TEMP POWER (PER AMP)		9.00		
62	TEMP LIGHT (SQ FT)		5.50		
63	UTILITY CONNECT CHAR...		0.00		
64	LIVING ALLOWANCE (DAY)		24.00		
65	TRAVEL EXPENSE (MILE)		.76		
66	FREIGHT		0.00		
67	PERMIT FEE		0.00		
68	MISC FEES		0.00		
69	DJC TAX				0.000

Permit fee varies, so you *may* want to wait and enter that value by job in Bid Recap. You can also alarm fields you want to address when finalizing your bid. This is done by right-clicking on the cell description and selecting ALARM from the dialog box. Right-click on PERMIT FEE and select ALARM. The cell is now highlighted in RED.

Final Price

14. Scroll to the **Final Price** row as shown in Figure 1-161. These entries total the takeoff items and quotes for your material, labor and equipment. Apply any final adjustments to Column D. Enter overhead percentages and profit percentages in column C. It is preferable to put a value in these cells to use as a starting point. These values can be changed later for any job in Bid Recap.

Subtotal 1 is the true cost of the job. It takes all your labor, equipment and subcontract costs and totals them. Subtotal 2 includes the job cost (Subtotal 1) plus overhead. Column C is a percent field assigning overhead to various components.

FIGURE 1-161. Final Price

	A	B	C	D	E	F	G
73	FINAL PRICE	ESTIMA...	ADJ %	ADJ $	CALC $	TAX %	% OF JOB
74	DATABASE MATERIAL	STM	(D74/B...	0	B74+D...	0.000	(E74/E108)...
75	QUOTED MATERIAL	QTT	(D75/B...	0	B75+D...	0.000	(E75/E108)...
76	MATERIAL/QUOTE TAX				(F74%...		(E76/E108)...
77	MATERIAL TOT...				SUM(E...		
78	DIRECT LABOR	M27	(D78/B...	0	B78+D...	0.000	(E78/E108)...
79	INDIRECT LABOR	M45	(D79/B...	0	B79+D...		(E79/E108)...
80							
81	LABOR TAX				F78%(...		(E81/E108)...
82	LABOR TOTAL				SUM(E...		
83	EQUIPMENT	ETT	(D83/B...	0	B83+D...	0.000	(E83/E108)...
84	SUBCONTRACTORS	STT	(D84/B...	0	B84+D...	0.000	(E84/E108)...
85	EQUIP & SUBCONT TAX				(F83%...		(E85/E108)...
86	EQUIP & SUB...				SUM(E...		
87	DIRECT JOB COSTS	M71	(D87/B...	0	B87+D...		(E87/E108)...
88	SUBTOTAL 1				E77+E...		
89	MATERIAL OVERHEAD		10.00		C89%(...		(E89/E108)...
90	QUOTES OVERHEAD		0.00		C90%(...		(E90/E108)...
91	LABOR OVERHEAD		0.00		C91%E...		(E91/E108)...
92	EQUIPMENT OVERHEAD		0.00		C92%(...		(E92/E108)...
93	SUBCONTRACTS OVERHE...		0.00		C93%(...		(E93/E108)...
94	DJC OVERHEAD		0.00		C94%E...		(E94/E108)...
95	TOTAL OVERHEAD				SUM(E...		
96	SUBTOTAL 2				E88+E95		
97	MATERIAL PROFIT		4.50		C97%(...		(E97/E108)...
98	QUOTES PROFIT		0.00		C98%(...		(E98/E108)...
99	LABOR PROFIT		0.00		C99%(...		(E99/E108)...
100	EQUIPMENT PROFIT		0.00		C100%...		(E100/E108...
101	SUBCONTRACTS PROFIT		0.00		C101%...		(E101/E108...

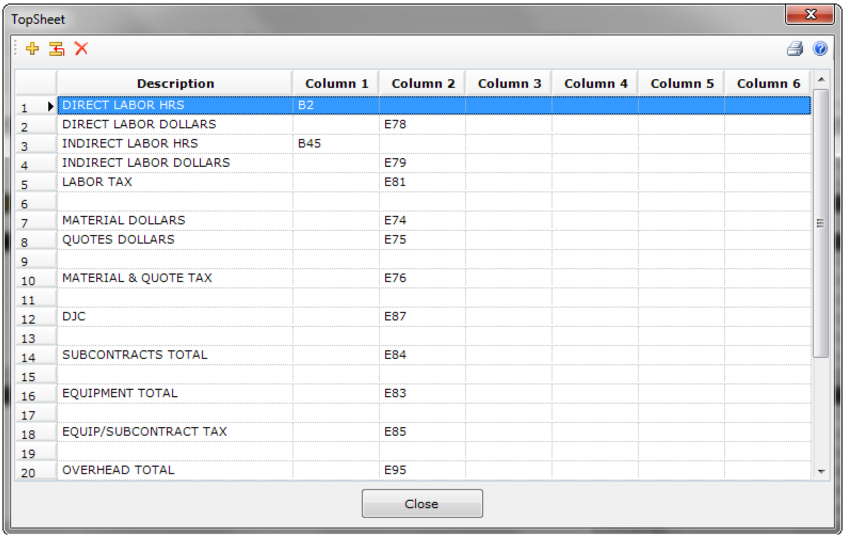
15. Scroll to the **Job Info** row. This stores information about the job. Fields to note are the square footage and number of units. These values depend on the job, so you will normally enter this information in Bid Recap. They are mentioned now to make you aware of some of the additional information available in Bid Recap.

Note: When you enter the square footage of the building during job registration, that number will automatically appear in the *Job Info* tab in Bid Recap. If you did not enter a value in Job Registration, you can add it into the *Job Info* tab. It is recommended you leave this field at 0 in template maintenance.

Top Sheet Maintenance

16. Click the **Top Sheet** button in the Bid Template Selection section. This displays the TopSheet window as shown in Figure 1-162. In Bid Recap, these components are displayed to summarize the information in the complete bid. This window defines which components are used for this summary and the cell location of these components. This section can be modified to your specifications. Double-click in the fields in the grid and type your changes. Use the **Add, Insert** and **Remove** buttons to add and remove lines from the grid. We will leave the Top Sheet as is and revisit it in Bid Recap. Click Close.

FIGURE 1-162. TopSheet window



	Description	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
1	DIRECT LABOR HRS	B2					
2	DIRECT LABOR DOLLARS		E78				
3	INDIRECT LABOR HRS	B45					
4	INDIRECT LABOR DOLLARS		E79				
5	LABOR TAX		E81				
6							
7	MATERIAL DOLLARS		E74				
8	QUOTES DOLLARS		E75				
9							
10	MATERIAL & QUOTE TAX		E76				
11							
12	DJC		E87				
13							
14	SUBCONTRACTS TOTAL		E84				
15							
16	EQUIPMENT TOTAL		E83				
17							
18	EQUIP/SUBCONTRACT TAX		E85				
19							
20	OVERHEAD TOTAL		E95				

That completes our work on the Bid Template. You can see that templates are very individual and depend on how you run your business. There is much more you can do to customize templates for your own needs. Use the right-mouse button to display a pop-up menu of actions you can perform. We recommend you DO NOT make modifications to the default templates. The final calculations are dependent on cell formulas and settings. Contact Technical Support if you must make changes.

Review Bid Template Maintenance

Bid Template Maintenance is where you set up, maintain and create templates for your bids. When you create a template with the values you need for working your locations (taxes, local rates), you save yourself time when you are under pressure to complete a bid. Create a bid template for each different situation by copying one of the included templates and making modifications. For example, you may work in two states where the rates and taxes differ. Copy the standard bid, name the bids for the state (i.e., MAINE BID and NH BID) and then modify the templates to reflect the costs depending on where the job is located. When you start a new job, select the appropriate template and most of the work is already done when you get to Bid Recap.

To completely understand the templates will take some study and experimenting on your own. Be sure to review Online Help for more detailed information.

We have our customized default bid template. Next we will show how these changes affects your bid. You will also see that you can modify any of the fields in the bid and how you can create as many versions of the bid as you wish. Each bid can be modified to select specific phases, change factors and settings, etc. This gives you the ability to either start over with a bid, make changes to the original bid for *what-if* scenarios or create bids for specific components from original bid data.

Final Notes

This completes this lesson guide. This guide just touched the surface of the tools and functions available in this estimating software. To become proficient, spend time working with the system. A good way to start practicing is to take a job you have recently completed and recreate that estimate. Keep it simple. Use the Online Help to discover the many built-in estimating functions and processes that make up this sophisticated package.

You are on your way to smart estimating with IntelliBid. We know you will be successful. Good luck! Use the help tools we have supplied as your first reference, take advantage of the training programs included with your purchase and remember our knowledgeable, friendly Technical Support team is just a phone call away.

Other Topics to Explore

Some of the features and functions mentioned earlier in this Lesson Guide mentioned earlier can make the takeoff faster and more efficient. These topics can be fully explored in the Online Help. A few of those topics are explored here, but click the Help icon or Help buttons in the software for information on the window you are working with. The Table of Contents, Index and Search options will locate any other topics of interest.

Phase Tree — See the topic *Phase Tree*.

Job Settings — Look in the topic *Takeoff Settings* in the index.

Change Orders — Change Orders work the same as jobs. In the Job Register, select the job for the Change Order and then click the **New Change Order** button on the Toolbar. This associates the Change Order with the selected job. From this point, work the Change Order the same as the job. You add takeoff, quotes and create a bid the same way. The only difference is you will check the **Show Change Orders** check box to be able to select the specific Change Order in Job lists and in Bid Recap, you will create a Change Order Proposal, rather than a Bid Proposal. Complete information is in Help.

Assembly Groups — In the second takeoff, we selected **DI-CAST SS** coupling and connectors during the takeoff from a list of different types. This makes the assemblies flexible allowing you to select the type during takeoff instead of using specific assemblies for each type. To take this a step further, you can set up the selections in the Assembly Groups for the job. See the topic *Assembly Item Groups* (look in the index under *Assembly*) in the Online Help system.

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