

Module 2: Specifications and other Settings

Note: Any words written in **BOLD** are referring to buttons in the software. Example, if the instruction wants you to click on a button that says “OK” then the instruction will say:

Click **OK**

All of Module 2 is looking at items in the Settings menu. So to get there, from the EstimatorXpress Main Menu click on the **Settings** option.

Once you are in the Settings Menu, click on **My Specifications**. This will bring you into the Library of Specifications.

Understanding the Specifications and how they affect your estimates

To start off with you should have 8 specifications, so firstly a quick run through of what differenced they have.

New Build Specification This is for pre – part L planned jobs, and as far as new builds are concerned is now becoming redundant, but we have left it in the software for the time being for reference. The new build spec has the fastest build speeds and defaults to a JCB for all groundwork.

Extension Specification This is the current specification for standard extension work. The main difference between this and the New Build Spec is that it allows longer build times for many tasks (an extension is generally slower due to issues like access, care of existing property and of course access) and a mini digger is the default excavator.

Renovation Specification This is the same as the Extension Spec but with further longer build times as renovation will have the probability of more unforeseen issues than an extension, plus all the added complications that are listed above for extensions

Timber Frame Specification This is for jobs where you are having a full timber frame kit supplied for the job. This spec is now redundant for new build timber frame, but is correct for extensions using a timber frame kit. The way it works is to automatically remove the inner leaf from cavity walls that are estimated (they are given a marker – **Included in Timber Frame**), and also remove the timber from estimated roofs. This is because the timber frame kit will make up the inner leaf and roof structure. When using this specification it is assumed that you will be adding a price for a supplied timber frame kit into the estimate (see Module 3)

Site Fab Timber Frame Spec This is similar to the Timber Frame Spec, but only deals with timber frame walls, so this specification removes the cavity wall inner leaf from estimated walls, but it does not alter the roof structure. With this spec you could be using a supplied kit for the timber frame walls (as above) or you can also price your own timber frame panels in the estimate. Again this version is now for extensions only.

New Build Part L Spec The Part L new build spec follows the latest building regulations and is based on the governments “elemental recipe” for new builds. Primarily this has increased levels of insulation in roof areas and cavity walls (polyisocyanurate (celotex etc)) for example as a default cavity wall insulation product. When you use a Part L spec, you will also use Part L templates in the relevant workbooks – more on that in Module 3.

Site Fab Timber Frame Part L This is the latest building regulations version of the site fab timber frame spec (timber frame walls only and standard roof) but with the latest regulations to cover new builds.

Timber Frame Part L Spec This is the latest building regulations version of the Timber Frame spec (for timber frame kits covering walls and roof structure) which is applicable for new builds.

Now we have gone through the basics of what types of job the different specifications cover, we need to explain what it is they do.

A specification is a bit like an architect’s spec; a list of materials (and in our case labour and plant) that are chosen for a job. The idea of having these in the software is that you can customise them to use your choice of products for particular tasks.

You can alter the supplied specifications, or you can copy them and make your own, and you can make as many as you like.

Typical examples of different specs:

- You do regular work for an architect who always specifies a particular type of timber for his roof joists that is a bit unusual. You could copy the New Build Part L spec and make a new one called Architects New Build Part L. You could then go into this specification and change the roof timber products to the ones that the architect likes to specify. Once saved, it means that whenever you do work for this architect, you have a specification set up with his default choice of materials so you can start an estimate using this spec and know that you have already got the materials set up correctly and don’t have to worry about them.
- You like to use a different type of block than the default one we have specified when you build extensions. You can copy the Extension Specification and make a new one called My Extension Spec (for example). You could then go in and find the places where 7N blocks are specified and change them to 10n blocks because that is the way YOU like to work. Once done, whenever you create a new estimate for an extension, you would select My Extension Spec and know that all your blocks are already set to the ones that you like to use.

So to summarise, a specification is a default way of working. You can of course tweak these within every estimate. If there is an item that you change in many or every estimate, then it makes sense that you change this product in the relevant specification and then save time having to repeat this every job. Over time you can make custom specifications or evolve existing ones to suit different sets of circumstances – this is useful when you repeat these types of job – once you have made a change you don't have to make it again thus saving time in the long run.

How to make your own Specifications

Ok, so far a lot of theory, so let's have a look at the specifications in more detail.

Firstly we are going to copy an existing one – that way we have one we can practice on

Click one on the **Extension Specification** and then click on **Copy Spec** on the top menu. You can also do this by clicking the right mouse button on the **Extension Specification**. You will then be prompted to give this new specification a name – call it something that makes sense to you “My Extension Spec” for example, and then click **OK**.

After a few moments your new specification will then open for you to look at.

Some more theory now:

On the left side is a column entitled **Item used for** – this column shows “tasks”. These tasks could be a material choice (Cavity Insulation for example), a Labour Task (Fix Cavity Insulation), and also Plant tasks (Plant for Excavation of trench). There will also be occasional sundry or subcontractor tasks, but the vast majority will be a material or labour task.

In most cases, where you see a material task, there will be a corresponding Labour Task further down the list – each sub section of the spec is organised by materials, then labour and then plant.

This first sub section we can see is the **Cavity Wall Specification (And General Walling Specification)**. This means that ALL cavity wall workbooks refer to this section of the extension specification when choosing materials, labour etc.

If you scroll down a few pages you will see more sub sections highlighted in bold such as **Partition Block Wall Specification**. Keep scrolling down for a few more pages and you will see there are many wall sections, and then you will get to **Tiled Roof General Specification**. All sloping tiled roof workbooks (of which there are several) use this sub section to choose materials and labour. This repeats all the way down the Extension Specification.

Last bit of theory:

The specification that you choose is in control – it is the boss! It tells your estimate what to use, how much to use, who is going to do a task and how long it will take. This is the case for all workbook calculators that are spec linked (more in Module 3 about that).

*Tip! Remember to click on the **Filters** button on the top menu and click **Highlight Selected Line***

Editing the Specification

So now have a rough idea of the role that the specification plays in an estimate; let's look at how you can change things in the spec to suit yourself.

There are two aspects to how you can change the main spec. You can select a different material (or Labourer) for a task, or you can alter how much product (or time) is used for a task.

Firstly let's look at changing a material. For example purposes we are going to change our cavity wall insulation product. Make sure you are at the top of the specification page, then look down the list about 15 lines for **Cavity Insulation**. You will notice that it is highlighted in bold red. Items in bold red are ones we have given a Critical marker (an option on the top menu). There is no other relevance of the red. For us it can also make it easier to find things in the spec.

Click on Cavity Insulation (you can in fact click anywhere on the line as long as it is the same line) and then click on **Change Resource**.

You will now see the price book open up in front of you, and the currently selected insulation product will be highlighted.

*Tip! If you want to close the price book, DO NOT click on the X button on the top right corner of the price book – this will close the software. Use the red X (**Cancel**) on the specification menu – top left corner.*

You will see that because the original material was of the type "Insulation" that we are in the middle of the insulation products in the Price Book. This is handy as we are looking for an alternative insulation product. We are looking for 100mm celotex type product from the HBXL Price tracker. We use the non branded name which is Polyisocyanurate.

Tip! You can use the Supplier filter to hide other merchants to make your search easier

Scroll down the list and click once on Polyisocyanurate Insulation Board 2400 x 1200 x 75mm.

Then click on **Select Resource** on the top menu (or right click and **Select Resource**)

The Edit Resource box will now pop up. This happens because when you change a resource (material, labour etc) it may have a different usage factor (how much is used for a task).

In the middle of the **Edit Resource** box you will see a section called **Usage**: The Usage factor determines how much a material is used for a task, or how long a labourer takes to do a task. In this case we need to set the usage for our new insulation product. The original insulation that we started out with was the traditional cavity wall packs of 5 sheets that cover 5.46 m². The Polyisocyanurate sheet that we have chosen will cover 2.88 m². The software does not automatically change when you select a different product (for a variety of reasons) so you need to manually tell EstimatorXpress what the new usage factor is. You can type the usage factor directly into the box, however the number is quite often fairly meaningless (0.183 Usage factor is not an obvious number) so to make this easy you click on the **Calculator** icon just to the right of **Usage Factor**.

Click on the calculator icon. You now see two boxes. The top one says how many of the item you are using, and the bottom box is the amount of coverage.

So in this example, it currently says you are using 1 Polyiso' Board to cover 5.46 m² of insulation. We know that this is wrong, these figures refer to the originally selected insulation product. So to change this, we alter the coverage box from 5.46488 to 2.88.

So now it should say you use 1 Polyiso' Board for 2.88 m² of Cavity Insulation

Now click **OK** and you will see that the usage factor has now changed to 0.34722. Again this number doesn't mean much, but remember clicking on the Calculator will always give you an explanation that should make sense.

Now we have set the Usage Factor for our new material, we can click **OK** again to finish. In the spec on your **Cavity Insulation** line you will now see we have a new material of choice – out Polyisocyanurate 75mm sheet.

Now that we have changed a product the first thing we need to think about is whether or not the new product alters the build speed. In this case, because we have changed from one product to quite a different one, the answer is yes – the new product in this case will take longer to install because it requires cutting and taping. The old cavity pack insulation just gets thrown into place so is a lot quicker.

So now we are going to perform the second type of spec change; Editing a Resource. This is where we carry on using the same material or labourer, but we alter the usage factor to use more or less material, or to speed up or slow down build speed.

As I mentioned earlier, most material tasks have a corresponding Labour task. Here our material task is **Cavity Insulation**, and our corresponding Labour task is **Fix Cavity Insulation**. Scroll down the list about a page or so until you see the line **Fix Cavity Insulation** (it is in plain blue text btw).

When you find that line and look across a column, you will see that it is using a labour gang to fix the insulation; 2 Bricklayers and mate. We are not going to change this to a different gang, but we are going to alter their speed of work.

To alter the usage of the Labour we use the **Edit Resource** option on the top menu, so select the line **Fix Cavity Insulation** and then click on **Edit Resource**.

The Edit Resource box will now open up. This should look familiar as we were in here earlier as part of the changing resource process. This time we have gone straight to Edit Resource to just alter the usage factor of our labourers. Click on the **Calculator** icon and it should say that it will take 1 Hours to do 27.7778 M2 of Fix Cavity Insulation.

There are a couple of ways we could change this. For example purposes I want to say that our new insulation takes twice as long to install.

To do this we could change the 1 hours to 2 hours, so it takes 2 hours to fix 27.7778 m2.

Or we could change the m2 fixed so so its takes 1 hours to do 13.8889M2.

Both are correct, just do it whichever way you prefer. When you click on **OK** the usage factor will change to 0.072. As per our earlier example, this doesn't really mean much to us, but pressing back on the **Calculator** button will show us what this figure represents.

Once you are happy with your figures, press **OK** until you get back to the specification screen

For practice, let's edit another resource. This time we are going to change the usage of a material to make it use twice as much. Go back to the top of the specification and then come down about 30 lines to the line **Plastering to inner blockwall** (again this is not in bold in the list) – you can find it a few lines above **Skirting boards** which is highlighted in red.

Click on the line **Plastering to inner blockwall** and then click **Edit Resource**. This time we are going to do a simple trick which is to double up on the usage of plasterboard which you would do if you were fitting two layers of board to a wall. When the box opens up, click on the **Calculator**. The Usage Factor Calculator screen will tell you that we are using 1 Plasterboard Square Edge 1200 x 2400 x 12.5mm for 2.85714 m2 of Plastering to inner blockwall. Change the **1** to **2** so that you use 2 Plasterboard' for 2.85714 M" of plastering. Click **OK**, and then click **OK** again to return to the specification screen. You have now configured this specification to fit two layers of plasterboard on the inside of cavity walls. We can of course now Edit Resource on the labour for this to add more time - search further down the screen for **Fix/Apply Plastering to Walls – Edit Resource** – click on the **Calculator**, change **1** hour to **1.5** hours and click **OK** twice to save. So we have said that twice as much board will add 50% more time to the fitting. This is just all for practice purposes so don't worry if these are not real figures.

Mini Specs

In recent versions we added a new feature called Mini Specs. The idea of these is that you can choose certain product types when you are in the process of creating your new estimate. We currently have Mini Spec selectors for Facing Bricks and for Roof Tiling, and we are about to release ones for Guttering and for Fascias & Bargeboards. This means that you can start off by picking your basic specification (Extension Specification for example) and then choose your facing brick price, Roof Tile type, guttering system and Fascia system all before you start estimating. We have several more of these planned for the coming year to allow you to do even more product selecting assorted areas of the build. The use of Mini Specs will actually decrease the amount of work you need to do with the main Specifications. The Mini Specs are covered in detail in a video on the support site.

Ok, that is the Specification section all finished, it is a bit to take in, but if you understand how the specifications affect and control the data in your estimates, then you have grasped one of the main areas of EstimatorXpress.

To leave the specification screen, click on **Close** on the top menu, and then click on **Close** again to leave the Library of Specifications and return to the Settings menu.

Changing your default Profit Mark-ups and Inflation

Ok, next onto something quite simple. In the Settings menu click on **My Profit & Inflation**.

This has a screen which has the default settings for Profit and inflation. Set these to whatever figures you would like to have as your normal rates when starting an estimate. Remember that once you are in an estimate these can be changed whenever you want.

Once you have set the figures, click on **OK** to finish.

Understanding Groups of Workbooks

The last section we are going to look at in Module 2 is the different preset groups of workbook calculators we have set up. The idea of these is that you can pick a preset group at the start of an estimate to give you an easy list to pick from when estimating. This can be easier than individually picking workbooks at the start of an estimate – it can be easy to miss some out.

In the Settings menu, click on **My Grouped Workbooks**

Across the top of each column you will see a name for a group; House, Bungalow, Renovation, Lean to Extension etc.

These are types of job, and below each one you will see a preset list of workbook calculators. Out of the box these lists are quite big – we do that on purpose so that you can't forget anything. You will see that groups will have several different types of walls, windows, doors, roofs etc. The idea is that if we put all of the cavity wall types in a list, when you get into your estimate you can just pick the one you need and ignore the others.

Once you have got more familiar with the software you can tweak these preset lists to suit yourself. You can remove workbooks that you don't want, add ones that you do want, and you can also make your own preset groups

Firstly, to remove a workbook from a list, simply click on it once and then click on the **Erase Workbook** button on the top menu. This does not delete the workbook from the software; it just takes it out of the list. If there is a workbook that you want to add to a list, click your mouse on the workbook below where you want the new one to be added, then click on **Add Workbook** on the top menu and choose the workbook you want to add.

In the Add Workbooks screen you can type in keywords to search at the top left of the box (DO NOT press ENTER – just type the word and wait a moment), or you can look at types of workbooks using the Workbook Type dropdown on the top right.

If you cannot find a workbook in here, then it means that it is already in the list – the Add Workbooks screen will only show workbooks that have not already been selected. Once you have found the workbook you want, tick it and click on **Select**.

Finally, you can make your own preset lists. To do this you start by picking an existing list and then clicking on **copy Column** on the top menu. You will be prompted to give the new group a name of your choosing, and then click **OK**. You can then erase or add workbooks to suit.

It is entirely up to you how much work you do in with Groups of workbooks. Some people like to make some very specific groups to suit certain jobs they do, other people like to have the big lists to pick from. The best solution is whatever works best for you.

Click on **Close** on the top menu to go back to the Settings menu.

There are a few other options in the Settings menu; My Bar Charts and My Reports. For the basic training course we are not going to look at these, but there are videos and FAQ's on the HBXL Support site with further information about these, and of course you can call tech support for a chat about these.

End of Module 2