EstimatorXpress®
Tutorial

EstimatorXpress® Tutorial

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HOW TO USE THIS BOOK AND GET STARTED

Firstly, we would like to thank you for choosing **EstimatorXpress®**. We hope that you find **EstimatorXpress®** an invaluable tool, helping you to price work quickly and accurately and manage your building projects professionally and profitably.

Installing EstimatorXpress®

For full details on installing and registering your **EstimatorXpress®** software see page 7.

What Can EstimatorXpress® Do?

This is perhaps one of the most important sections of this guide as it summaries the capabilities of **EstimatorXpress®** and what it can do for you. For a detailed description see page 9.

Tutorials

To obtain maximum benefit from your **EstimatorXpress®** software, we recommend all new users work through the **Tutorial** in this guide. The Tutorial takes you through the costing and planning of a typical extension and will normally take you approximately 2-3 hours to complete. On completing the Tutorial you will have a good idea of how the system works and what it can do for you. See page 24 to start the Tutorial.

Getting Started With 'Real' Estimates

Once you have grasped the principles of **EstimatorXpress®** you will want to start estimating immediately. However before you start working on a 'real' estimate it is essential to tailor the system to your own requirements to avoid repetitive adjustments to each estimate.

To do this you should:

[1] Download latest materials prices from hbxl.co.uk into the software **Price Book** (see page 29)
[2] Speak to your local builders merchant to agree terms on materials and enter them into the **Price Book**
[3] Check that the labour, plant and subcontract rates accord with your own business and if not, modify them to suit
[4] Create your own **Specifications** for the different types of work you undertake. By doing this you will avoid repetitive adjustments in each **Estimate** (see page 37)

Additional Help

HBXL takes the accuracy of your project costings as seriously as you do and unlike many companies, we don't skimp on the help we provide to get you and your team up and running as fast as possible. After all, the reason you have purchased EstimatorXpress® is to save you time! HBXL offers full technical support from the **Support Team** on **0117 916 7899** provided that you hold a valid **Support and Updates** subscription**.** For more information, please contact HBXL on **0117 916 7899.**

Additional Context Sensitive Help is also available on every software screen by pressing the **F1** key on your keyboard at any time or pressing the **Help button** on every screen.

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INSTALLING ESTIMATORXPRESS® & IMPORTANT NOTES

1. INSTALL YOUR ESTIMATORXPRESS® SOFTWARE

1. Insert CD into drive. The CD should Autorun.
2. If Autorun has been disabled, select Run from the Start Menu, type in D:\Setup.exe (where D: is your CD drive)
3. After the installation wizard has started, follow the on-screen instructions until the installation is complete.

2. LAUNCHING ESTIMATORXPRESS® FOR THE FIRST TIME

Before attempting to run your **EstimatorXpress®** software, it is essential that you check the following:

- Ensure you are running Windows® Vista*/ 7/ 8/ 10
- Ensure you are running Microsoft® Word and Excel 2007/ 2010/ 2013/2016
- Ensure your Microsoft Excel Macro settings are set to medium (for instructions on how to check this please see page **Error! Bookmark not defined.**)

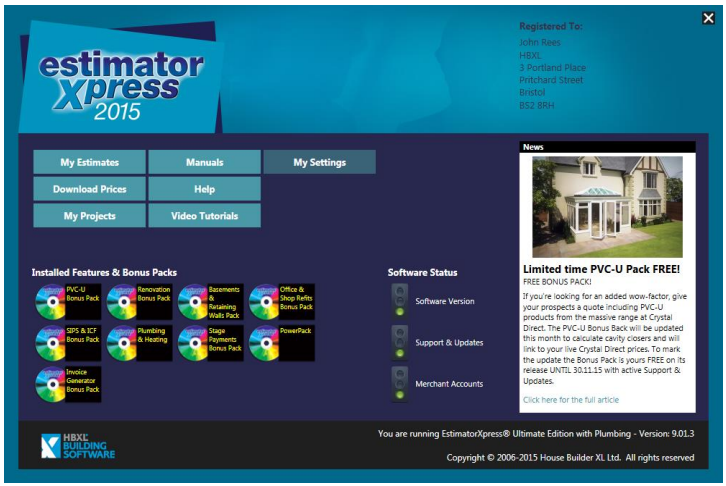
* Windows® Vista only supports Microsoft® Word and Excel 2007. Running earlier versions of Word and Excel with Windows® Vista is not recommended and is not supported.

1. To launch the system either double-click on the **EstimatorXpress®** icon on your desktop or select **EstimatorXpress®** from the Start, Programs Menu.

2. Once **EstimatorXpress®** starts opening, depending on your system settings, you may need to press **Enable Macros** button on the Microsoft Excel virus protection dialog box. (See Page 9)

3. You will then be required to follow the registration wizard to fill in your contact details and register your copy of **EstimatorXpress®**.

When complete, you will then see the **Main Menu** appears.



3. DOWNLOADING LATEST MATERIAL PRICES

You must have a valid **Support & Updates** subscription in order to obtain access to the latest materials prices from the hbxl.co.uk website. You can then update your **EstimatorXpress® Price Book** with over 1300 generic products at trade prices automatically maintained for you by HBXL using **Price Tracker Technology**. **Price Tracker** helps you to avoid the tedious and time-consuming task of keeping a **Price Book** up-to-date manually.

4. OPENING ACCOUNTS WITH ESTIMATORXPRESS® MERCHANT PARTNERS

In addition you may also be able to open **HBXL Trade Accounts** with our Merchant Partners which will give you access to Merchant catalogues on-line @ hbxl.co.uk and the ability to download thousands of new products into your software. Please note that a fee may be payable to access a merchant catalogue and that you must have a valid **Support & Updates** subscription to obtain this service.

To find out more about opening **Trade Accounts** with our Merchant Partners, please contact HBXL on 0117 916 7899.

WHAT CAN ESTIMATORXPRESS® DO?

Welcome to EstimatorXpress®

Market leading **EstimatorXpress®** is loaded with tools to help you quickly and accurately budget and plan your building works from start to completion, calculating costs and quantities of materials, labour and plant as well as wastage. It even tells you when to order!

EstimatorXpress® is suitable for the small building business and property developer and can handle extensions, new builds, renovations and conversions working from either a sketch scheme or full working drawing. **EstimatorXpress®** is also fully Part L compliant (Building Regulations governing insulation for all new dwellings). **EstimatorXpress®** is also invaluable for the self-builder.

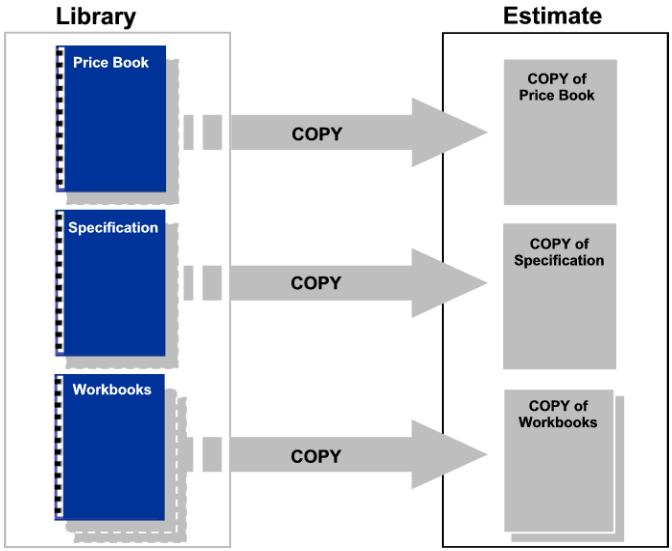
ESTIMATING SYSTEM

In **EstimatorXpress®** you will find all the components you need to quickly and accurately cost your projects. These components include:

- **Price Book** (containing a list of resources and rates)
- **Specification** (telling you how the **Job** is constructed)
- **Workbooks** (these are the estimating templates where the detailed calculations are undertaken)

Each of these components is stored in **Libraries** within your **EstimatorXpress®** software. It is important to be aware that each time you set up a new estimate, **EstimatorXpress®** automatically makes a **COPY** of each of the above **Library** components (**Price Book**, **Specification** and **Workbooks**) and places the **COPY** in the estimate to create a **Job Price Book,** a **Job Specification** and **Job Workbooks.**

Once you have created your estimate, any changes that you make in the **Job Price Book**, **Specification** or **Workbooks** will NOT affect or damage the Library items.



Let's take a look in more detail at the **Price Book** and **Specification**.

The Master Price Book

EstimatorXpress® is provided 'out of the box' with a comprehensive **Master Price Book** of 1300+ resources. The **Price Book** is the heart of **EstimatorXpress®** where all the resource rates are contained. The **Price Book** is split into 5 sections:

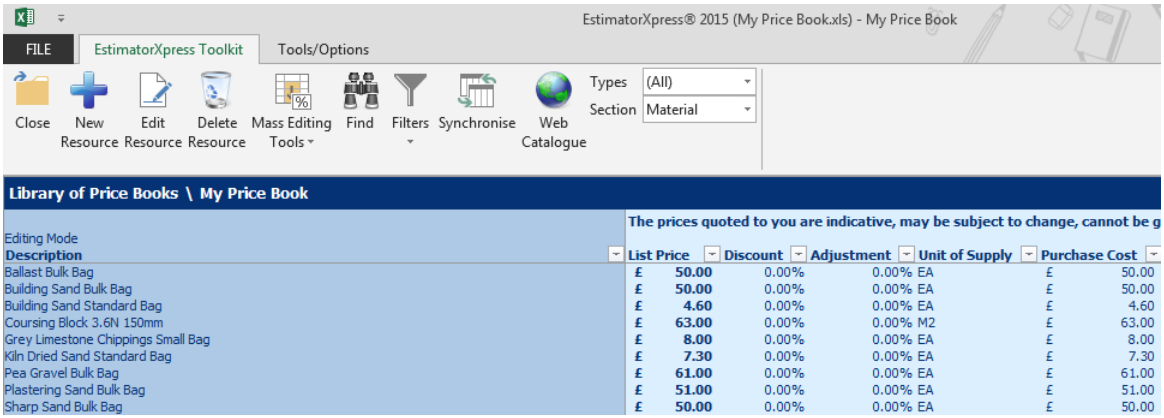
- Materials
- Labour
- Plant
- Subcontract
- Sundry

To ensure your estimates are always accurate and up-to-date, the material rates within the **Price Book** are linked via Price Tracker technology with an on-line catalogue of over 1300 product prices. These prices are updated for you by HBXL so that you can simply download any changes in order to keep your **Price Book** up to date. For easy identification, the **Purchase Price** of the web-based items are in bold type within the **Price Book**. In order to access the online **Price Tracker service**, you must have a valid subscription to **Support & Updates**. [To download latest prices into your **Price Book** see page 29.]

You can of course manually add your own resources to the **Price Book** to tailor it to your exact needs and modify the rates at any time to ensure they reflect your local conditions. These items are not linked to the **EstimatorXpress®** website and therefore their prices must be checked and maintained manually.

You can also create your own (secondary) **Price Book**s which are saved for future use in the **Library of Price Books**. This feature is only available with the Total Toolkit edition. Note that unlike the **Master Price Book**, these secondary **Price Books** will not be directly plugged into the **EstimatorXpress® Price Tracker** updates or any on-line merchant catalogues. However, it is possible to synchronise secondary **Price Books** with the **Master Price Book** if you wish.

*[In addition you may also be able to open **HBXL Trade Accounts** with our Merchant Partners which will give you access to merchant catalogues on-line @ hbxl.co.uk and the ability to download thousands of new products into your software. Please note that a fee may be payable. See page 8 for more information]*

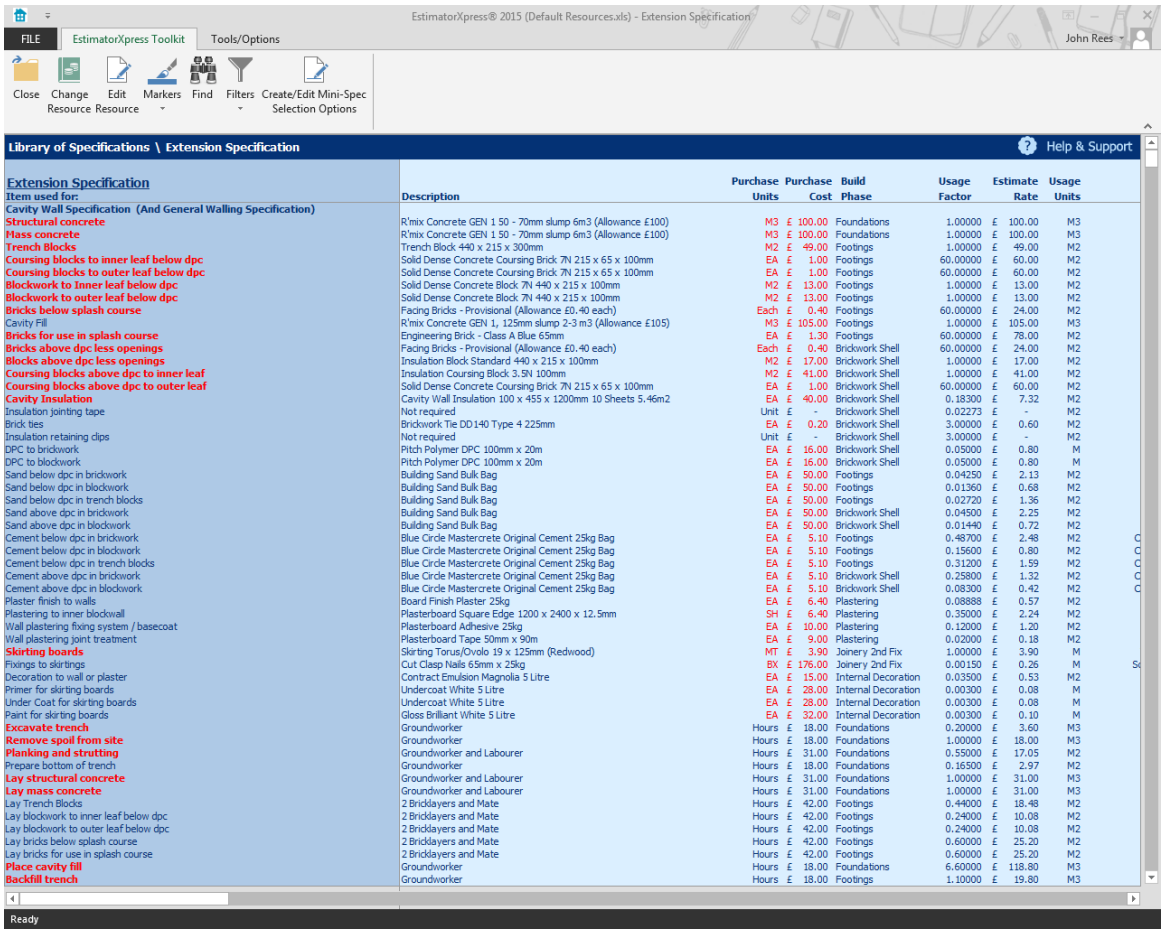


The Specification

EstimatorXpress® is provided with five standard **Specification**s to get you started. The **Specification**s are stored in the **Library of Specifications**. These standard **Specifications** are **New Build Specification** (Brick & Block), **Timber Frame Specification**, **Extension Specification**, **Renovation Specification** and **Site Fabricated Timber Frame Specification**. Each contains typical **Materials** and associated **Labour** and **Plant** rates for those types of construction. All these resources are sourced from the **Price Book**.

You can modify these standard **Specification**s to contain your choice of **Materials**, **Labour** and **Plant**. E.g. you can define the blocks you prefer and your own usage rate. Pre-defining and saving your preferences early on avoids having to make repetitive adjustments when estimating since the **Materials**, **Labour** and **Plant** you specified will be used as 'standard'. [See page 37 to modify your **Specification**]

This is particularly useful if you repeatedly build houses or extensions of a similar 'style' or **Specification**. For example, you may want to create a **Specification** for high quality brick and block houses using clay tiles and hand-made bricks or you may wish to develop a **Specification** for economy brick and block using concrete tiles and a cheaper brick.

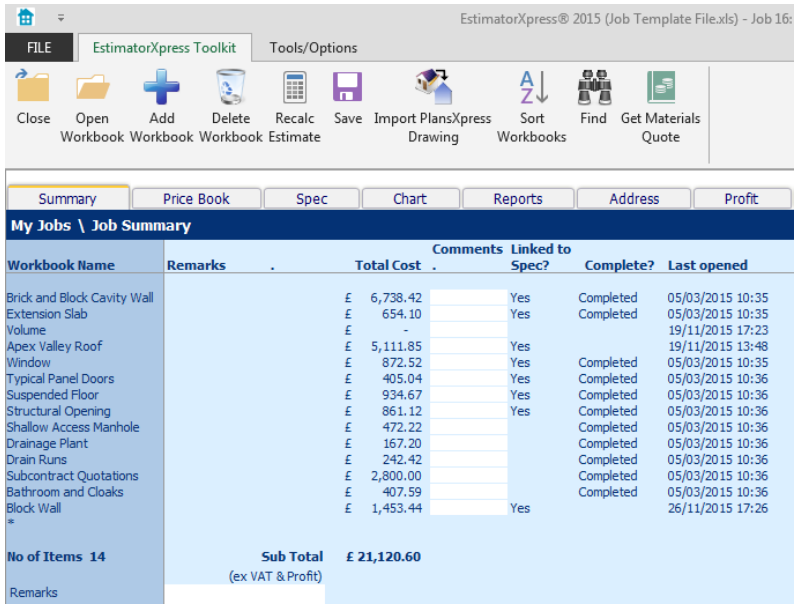


Extension Specification Item used for:	Description	Purchase Units	Purchase Cost	Build Phase	Usage Factor	Estimate Rate	Usage Units
Cavity Wall Specification (And General Walling Specification)							
Structural concrete	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £100)	M3	£ 100.00	Foundations	1.00000	£ 100.00	M3
Mass concrete	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £100)	M3	£ 100.00	Foundations	1.00000	£ 100.00	M3
Trench Blocks	Trench Block 440 x 215 x 300mm	M2	£ 49.00	Footings	1.00000	£ 49.00	M2
Coursing blocks to inner leaf below dpc	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	EA	£ 1.00	Footings	60.00000	£ 60.00	M2
Coursing blocks to outer leaf below dpc	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	EA	£ 1.00	Footings	60.00000	£ 60.00	M2
Blockwork to Inner leaf below dpc	Solid Dense Concrete Block 7N 440 x 215 x 100mm	M2	£ 13.00	Footings	1.00000	£ 13.00	M2
Blockwork to outer leaf below dpc	Solid Dense Concrete Block 7N 440 x 215 x 100mm	M2	£ 13.00	Footings	1.00000	£ 13.00	M2
Bricks below splash course	Facing Bricks - Provisional (Allowance £0.40 each)	Each	£ 0.40	Footings	60.00000	£ 24.00	M2
Cavity Fill	R'mix Concrete GEN 1, 125mm slump 2-3 m3 (Allowance £105)	M3	£ 105.00	Footings	1.00000	£ 105.00	M3
Bricks for use in splash course	Engineering Brick - Class A Blue 65mm	EA	£ 1.30	Footings	60.00000	£ 78.00	M2
Bricks above dpc less openings	Facing Bricks - Provisional (Allowance £0.40 each)	Each	£ 0.40	Brickwork Shell	60.00000	£ 24.00	M2
Blocks above dpc less openings	Insulation Block Standard 440 x 215 x 100mm	M2	£ 17.00	Brickwork Shell	1.00000	£ 17.00	M2
Coursing blocks above dpc to inner leaf	Insulation Coursing Block 3.5N 100mm	M2	£ 41.00	Brickwork Shell	1.00000	£ 41.00	M2
Coursing blocks above dpc to outer leaf	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	EA	£ 1.00	Brickwork Shell	60.00000	£ 60.00	M2
Cavity Insulation	Cavity Wall Insulation 100 x 455 x 1200mm 10 Sheets 5.46m2	EA	£ 40.00	Brickwork Shell	0.18300	£ 7.32	M2
Insulation jointing tape	Not required	Unit	£ -	Brickwork Shell	0.02273	£ -	M2
Brick ties	Brickwork Tie DD140 Type 4 225mm	EA	£ 0.20	Brickwork Shell	3.00000	£ 0.60	M2
Insulation retaining clips	Not required	Unit	£ -	Brickwork Shell	3.00000	£ -	M2
DPC to brickwork	Pitch Polymer DPC 100mm x 20m	EA	£ 16.00	Brickwork Shell	0.05000	£ 0.80	M
DPC to blockwork	Pitch Polymer DPC 100mm x 20m	EA	£ 16.00	Brickwork Shell	0.05000	£ 0.80	M
Sand below dpc in brickwork	Building Sand Bulk Bag	EA	£ 50.00	Footings	0.04250	£ 2.13	M2
Sand below dpc in blockwork	Building Sand Bulk Bag	EA	£ 50.00	Footings	0.01360	£ 0.68	M2
Sand below dpc in trench blocks	Building Sand Bulk Bag	EA	£ 50.00	Footings	0.02720	£ 1.36	M2
Sand above dpc in brickwork	Building Sand Bulk Bag	EA	£ 50.00	Brickwork Shell	0.04500	£ 2.25	M2
Sand above dpc in blockwork	Building Sand Bulk Bag	EA	£ 50.00	Brickwork Shell	0.01440	£ 0.72	M2
Cement below dpc in brickwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	£ 5.10	Footings	0.48700	£ 2.48	M2
Cement below dpc in blockwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	£ 5.10	Footings	0.15600	£ 0.80	M2
Cement below dpc in trench blocks	Blue Circle Mastercrete Original Cement 25kg Bag	EA	£ 5.10	Footings	0.31200	£ 1.59	M2
Cement above dpc in brickwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	£ 5.10	Brickwork Shell	0.25800	£ 1.32	M2
Cement above dpc in blockwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	£ 5.10	Brickwork Shell	0.08300	£ 0.42	M2
Plaster finish to walls	Board Finish Plaster 25kg	EA	£ 6.40	Plastering	0.08888	£ 0.57	M2
Plastering to inner blockwall	Plasterboard Square Edge 1200 x 2400 x 12.5mm	SH	£ 6.40	Plastering	0.35000	£ 2.24	M2
Wall plastering fixing system / basecoat	Plasterboard Adhesive 25kg	EA	£ 10.00	Plastering	0.12000	£ 1.20	M2
Wall plastering joint treatment	Plasterboard Tape 50mm x 90m	EA	£ 9.00	Plastering	0.02000	£ 0.18	M2
Skirting boards	Skirting Torus/Ovolo 19 x 125mm (Redwood)	MT	£ 3.90	Joinery 2nd Fix	1.00000	£ 3.90	M
Fixings to skirtings	Cut Clasp Nails 65mm x 25kg	BX	£ 176.00	Joinery 2nd Fix	0.00150	£ 0.26	M
Decoration to wall or plaster	Contract Emulsion Magnolia 5 Litre	EA	£ 15.00	Internal Decoration	0.03500	£ 0.53	M2
Primer for skirting boards	Undercoat White 5 Litre	EA	£ 28.00	Internal Decoration	0.00300	£ 0.08	M
Under Coat for skirting boards	Undercoat White 5 Litre	EA	£ 28.00	Internal Decoration	0.00300	£ 0.08	M
Paint for skirting boards	Gloss Brilliant White 5 Litre	EA	£ 32.00	Internal Decoration	0.00300	£ 0.10	M
Excavate trench	Groundworker	Hours	£ 18.00	Foundations	0.20000	£ 3.60	M3
Remove spoil from site	Groundworker	Hours	£ 18.00	Foundations	1.00000	£ 18.00	M3
Planking and strutting	Groundworker and Labourer	Hours	£ 31.00	Foundations	0.55000	£ 17.05	M2
Prepare bottom of trench	Groundworker	Hours	£ 18.00	Foundations	0.16500	£ 2.97	M2
Lay structural concrete	Groundworker and Labourer	Hours	£ 31.00	Foundations	1.00000	£ 31.00	M3
Lay mass concrete	Groundworker and Labourer	Hours	£ 31.00	Foundations	1.00000	£ 31.00	M3
Lay Trench Blocks	2 Bricklayers and Mate	Hours	£ 42.00	Footings	0.44000	£ 18.48	M2
Lay blockwork to inner leaf below dpc	2 Bricklayers and Mate	Hours	£ 42.00	Footings	0.24000	£ 10.08	M2
Lay blockwork to outer leaf below dpc	2 Bricklayers and Mate	Hours	£ 42.00	Footings	0.24000	£ 10.08	M2
Lay bricks below splash course	2 Bricklayers and Mate	Hours	£ 42.00	Footings	0.60000	£ 25.20	M2
Lay bricks for use in splash course	2 Bricklayers and Mate	Hours	£ 42.00	Footings	0.60000	£ 25.20	M2
Place cavity fill	Groundworker	Hours	£ 18.00	Foundations	6.60000	£ 118.80	M3
Backfill trench	Groundworker	Hours	£ 18.00	Footings	1.10000	£ 19.80	M3

The Workbooks

EstimatorXpress® carries out the estimating in templates or '**Workbooks**' as we call them. **Workbooks** are used to cost the different elements of the building process, i.e. House Slab, Cavity Wall, Block Wall, Apex Roof and so on. An estimate will therefore normally be made up of multiple **Workbooks** unless you specialise in certain areas of construction.

Many of the **Workbooks** are linked to the **Job Specification** meaning that the **Workbook** automatically 'looks up' the standard material, labour and plant resources from the **Specification** that you selected when you first created your estimate.



Simply enter your dimensions into your chosen **Workbooks** and **EstimatorXpress®** will calculate all of the **Materials**, **Labour**, **Plant**, **Subcontract** and **Sundry** quantities with associated costs in line with your chosen **Specification**.

EstimatorXpress® comes with over 300 standard **Workbooks.** These **Workbooks** are stored in the **Library of Workbooks**.

You can also create your own **Workbooks** if you find certain works you undertake do not appear within the **Library of Workbooks**. You can do this in two ways:

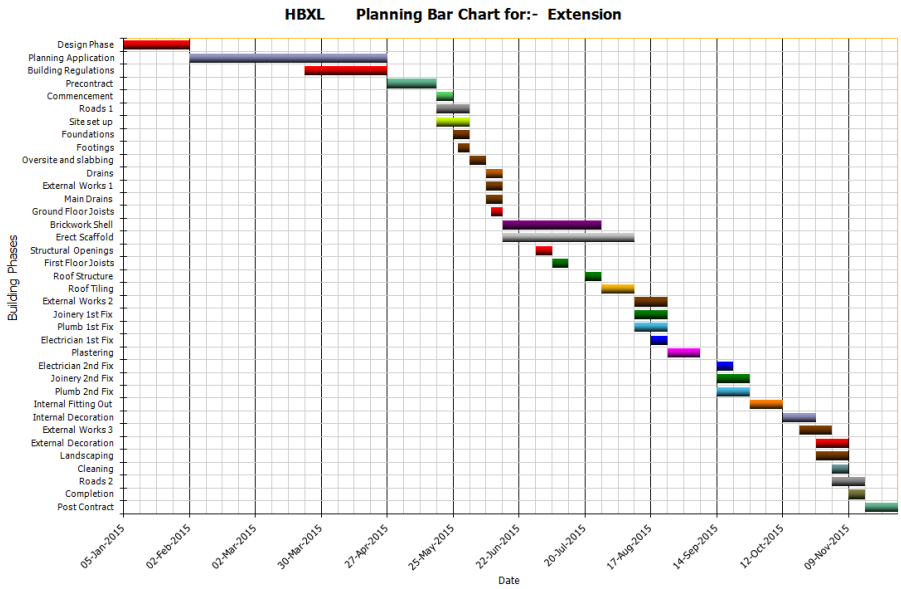
1. By copying and modifying an existing **Workbook** to create your own bespoke **Workbook**
2. By creating a completely new **Workbook** by using a composite, area, volume or perimeter or **PowerPack*** **Workbook**.

TIP: As well as complete builds, **EstimatorXpress®** is suitable for estimating individual elements of a build. For example, if you are a roofing contractor you can estimate and schedule just the tiling using one of the various **Workbooks** such as Apex Roof or Apex Truss Roof. Similarly if you are only involved in groundworks, you can estimate just the Drain Runs, Manholes & Plant, Driveways and Slab. If you only undertake foundations, simply use the Cavity Walls **Workbook** and select the **Foundations only** dimensional template.

***PowerPack** is an optional extra software module for experienced **EstimatorXpress®** users available to buy from HBXL. Please call 0117 916 7899 for more details.

BAR CHART PLANNER

EstimatorXpress® includes an easy to use **Bar Chart Planner** to plan your build program realistically and professionally.



The fully interactive and modifiable chart displays the tasks to be performed throughout your build. Each **Build Phase** (or bar on the chart) is linked to resources in your estimate e.g. the Foundations bar on the chart is linked to all the **Materials**, **Labour**, **Plant**, **Subcontract** and **Sundry** involved with the construction of the foundations.

Depending on the scale of your project you may want to view your chart on a week-by-week or day-by-day basis.

Several charts are included in the **Library of Bar Charts** as standard with the system. You can modify any **Bar Chart** to suit your own project(s). Alternatively you can create your own bespoke charts in minutes by copying and modifying a 'standard' chart to create a new chart, e.g. Refurbishment, and save it to the **Library of Bar Charts** for future use.

You can update your **Job Bar Chart** at any time to reflect changes to your build program e.g. delays due to poor weather. It is also possible to add new bars to the chart specific to your project (if they don't already exist). You can print out your chart in full colour or black and white. These print outs will give you a professional edge when meeting customers and financial lenders. You'll also find them invaluable for on-site management.

REPORT MANAGER

With your **Estimate** and **Bar Chart** complete, **EstimatorXpress®** produces a variety of detailed and professional reports and charts, which you can print out from the **Report Manager**. **Reports** that can be printed include:

- Costs (with or without VAT)
- Costs (with or without wastage)
- Breakdown of Costs by Build Phase - Pie Chart
- Sales Price including Profit
- Profit Forecast
- Breakdown of Profit by Build Phase - Pie Chart
- Customer Quote
- Cash Flow
- Sales Price Cash Flow - Chart
- Labour Time Schedules
- Plant Task List
- Material Schedule
- Inflated Costs
- PLUS many more!

It is possible to produce a virtually unlimited number of **Reports** by filtering and sorting the estimate data from within the **Report Manager**. Data is fully exportable to Microsoft® Excel.

PLEASE NOTE: Depending on the edition of EstimatorXpress® you are using, there will be a different number of Reports available to you. If you are using EstimatorXpress® Total Toolkit you will see over 50 reports available for you to view and print to review the output of your estimate including over 20 charts showing graphical breakdowns of profit, cost, price and cashflow by Workbook, Build Phase, Resource Type and Trade (marked by a pie chart symbol) and over 20 tabular reports including Sales Price inc. Profit, Materials Task List, Basic Costs, Inflated Costs and many more (there reports are marked by a document symbol) that can be viewed and modified to show as much or as little detail as you require. If you are using EstimatorXpress® Lite, you will see a restricted set of these reports.

Build Phase	Item Costs	Wastage Costs	Total Costs	Sum of Profit (Ex VAT)	Sum of Tot Inc Prof(Ex VAT)
Brickwork Shell	£4,326.47	£237.48	£4,563.95	£1,369.18	£5,933.13
Completion	£8.50	£0.00	£8.50	£2.55	£11.05
Drains	£623.12	£31.42	£654.53	£196.36	£850.89
Electrician 1st Fix	£1,500.00	£0.00	£1,500.00	£450.00	£1,950.00
External Decoration	£71.72	£0.68	£72.40	£21.72	£94.12
First Floor Joists	£345.14	£21.63	£366.77	£110.03	£476.80
Footings	£420.38	£24.83	£445.21	£133.56	£578.78
Foundations	£925.78	£17.28	£943.06	£282.92	£1,225.97
Internal Decoration	£360.41	£4.26	£364.67	£109.40	£474.08
Internal Fitting Out	£370.30	£29.53	£399.83	£119.95	£519.78
Joinery 1st Fix	£711.46	£30.78	£742.24	£222.67	£964.91
Joinery 2nd Fix	£256.60	£10.48	£267.08	£80.12	£347.21
Landscaping	£0.00	£0.00	£0.00	£0.00	£0.00
Oversite and slabbing	£591.53	£31.64	£623.17	£186.95	£810.12
Plastering	£1,103.61	£26.11	£1,129.72	£338.92	£1,468.64
Plumb 2nd Fix	£1,300.00	£0.00	£1,300.00	£390.00	£1,690.00
Roof Structure	£1,585.54	£74.65	£1,660.19	£498.06	£2,158.25
Roof Tiling	£2,180.83	£99.15	£2,279.98	£684.00	£2,963.98
Structural Openings	£729.56	£16.48	£746.04	£223.81	£969.86
Grand Total	£17,410.94	£656.42	£18,067.36	£5,420.21	£23,487.56

STANDARD WORKBOOKS SUPPLIED WITH ESTIMATORXPRESS®

Below is a list of the **Workbooks** supplied with **EstimatorXpress®**. You can modify and save each **Workbook** to suit your way of working or create your own **Workbooks** based on the **Composite**, **Area**, **Volume** and **Perimeter Workbooks**.

150 mm Architectural Stone Cill
75 mm Architectural Stone Cill
Apartment Lobby
Apex Roof
Apex Truss Roof
Apex Valley Roof
Apex Valley Truss Roof
Architectural Stone Cills
Architectural Stone Quoins
Area
Attic Block Wall
Attic Shaped Wall Decoration
Attic Shaped Wall Finishing
Attic Stud Wall
Attic Suspended Floor
Attic Suspended Floor for Side Voids
Attic Suspended Floor for Truss Roof
Attic Wall and Sloping Ceiling Decoration
Back Door
Basic Plaster Patching
Basic Plasterboard and Skim to Timbers
Basic Plasterboard and Skim to Walls
Basic Plastering and Insulation to Walls
Basic Plastering to Walls
Basic Rendering to Walls
Basic Tapered Edge Plasterboard and Skim to Walls
Bathroom and Cloaks
Bathroom Electrics
Beam and Block Floor
Bi-fold Patio Doors Aluminium
Bi-fold Patio Doors Hardwood
Bi-fold Patio Doors Softwood
Bi-fold Patio Doors uPVC
Feature Fire Place and Fire
Fire Stops
Fitted Kitchen
Flat Roof
Flat Roof for Bay Window
Floor Screed
Floorboard Lifting for Installations
Front Door
Garage Pedestrian Door
Garage Slab
Garden Wall
Gas Flue System
General Electrical Installation
Glulam Beam
Gypsum Silent Floor Renovation
Hacking Plaster from Walls
Half Hip Roof
Half Hip Truss Roof
Half Turn Staircase
Half Turn Staircase with 2 Intermediate Landings
Hardwood 1200 French Door
Hardwood 1800 French Door
Hardwood 2400 French Door
Hardwood Custom Size Window
Hardwood Custom Size Window for Dormer
Hardwood Replacement Window
Hardwood Standard Bay Windows
Hardwood Standard Walk-In Bay Windows
Hardwood Windows 1050 Deep
Hardwood Windows 1200 Deep
Header Course
House Slab
Inspection Chamber
Roof Windows
Roofing Sundries
Scaffolding
Services Charges
Services Installation
Shallow Access Manhole
Single Garage Door
Site Acquisition Costs
Site Appraisal Costs
Site Clearance and Topsoil
Site Establishment
Site Mix Concrete
Site Strip
Skirting Boards and Other Mouldings for Walls
Sleeper Wall
Sloping Stud Wall
Small Structural Opening
Small Structural Opening to New Wall
Soakaway
Softwood Bar Dummy Sash 1050 Deep
Softwood Bar Dummy Sash 1200 Deep
Softwood Bar Dummy Sash 1350 Deep
Softwood Bar Dummy Sash 1500 Deep
Softwood Bar Dummy Sash 900 Deep
Softwood Bar Dummy Sash Bay Windows
Softwood Bar Dummy Sash Walk-In Bay Windows
Softwood Custom Size Window
Softwood Custom Size Window for Dormer
Softwood Dummy Sash 1050 Deep
Softwood Dummy Sash 1200 Deep
Softwood Dummy Sash 1350 Deep
Softwood Dummy Sash 1500 Deep
Softwood Dummy Sash 900 Deep

Block Paving
Block Wall
Brick and Block Cavity Wall
Brickwork Arches
Ceramic Wall Tiling
Chasing Walls
Chimney
Chimney Stack
Clad Dormer Walls For Flat Roof
Clad Dormer Walls For Hip Roof
Clad Dormer Walls For Slope Roof
Clad Sides for Wall Dormer
Cladding with Horizontal Timbers
Cladding with Vertical Timbers
Cleaning
Close Boarded Fencing
Complete Room Decoration
Complete Room Plastering
Composite Items
Composite Items 1
Composite Items 2
Composite Items 3
Concrete Edgings
Concrete Garden Wall Coping
Concrete Parapet Wall Coping
Concrete Sloping Roof Coping
Custom Size Back Door
Custom Size Bay Window
Custom Size Double Garage Door
Custom Size Double Internal Doors
Custom Size Fabricated Steel Beam
Custom Size Fabricated Steel Post
Custom Size French Door
Custom Size Front Door
Custom Size Internal Door
Custom Size Patio Door
Custom Size Single Garage Door
Cut Roof Attic Interior Conversion
Internal Cavity Block Wall
Internal Lighting
Internal Renovation
Internal Stripping Out
Internal Timber Frame Studding
Internal Timber Frame Studding for Gable
Kitchen Electrics
Landscaping
Lead Dormer Walls For Flat Roof
Lead Dormer Walls For Hip Roof
Lead Dormer Walls For Slope Roof
Lead Sides for Wall Dormer
Lean To Roof
Lean to Truss Roof
Loft Sundries
Multileaf Brick Wall
Natural Stone Garden Wall Coping
Natural Stone Parapet Wall Coping
Natural Stone Sloping Roof Coping
Opening in Existing Floor
Painting and Decorating Plant
Panel Fencing
Part L Beam and Block Floor
Part L Floor Screed
Part L Timber Frame Panel
Part L Timber Frame Panel for Gable
Paving
Pavior Edgings
Perimeter
Perimeter Sealant for Gypsum Silent Floor
Plain End Architectural Stone Heads
Plant for Timber Frame
Plastering to Attic External Shaped Walls
Plastering to Attic Internal Shaped Walls
Plastering to Attic Walls and Sloping Ceilings
Plumbing and Heating
Post and Netting Fencing
Post and Rail Fencing
Softwood Dummy Sash Bay Windows
Softwood Dummy Sash Walk-In Bay Windows
Softwood Georgian Bar Bay Windows
Softwood Georgian Bar Walk-In Bay Windows
Softwood Georgian Bar Windows 1050 Deep
Softwood Georgian Bar Windows 1200 Deep
Softwood Georgian Bar Windows 1350 Deep
Softwood Georgian Bar Windows 1500 Deep
Softwood Georgian Bar Windows 900 Deep
Softwood Horizontal Bar Bay Windows
Softwood Horizontal Bar Walk-In Bay Windows
Softwood Horizontal Bar Windows 1050 Deep
Softwood Horizontal Bar Windows 1200 Deep
Softwood Horizontal Bar Windows 1350 Deep
Softwood Horizontal Bar Windows 1500 Deep
Softwood Horizontal Bar Windows 900 Deep
Softwood Replacement Window
Softwood Sash Bay Windows
Softwood Sash Walk-In Bay Windows
Softwood Sash Windows 1050 Deep
Softwood Sash Windows 1200 Deep
Softwood Sash Windows 1350 Deep
Softwood Sash Windows 1500 Deep
Softwood Sash Windows 900 Deep
Softwood Standard Bay Windows
Softwood Standard Walk-In Bay Windows
Softwood Standard Windows 1050 Deep
Softwood Standard Windows 1200 Deep
Softwood Standard Windows 1350 Deep
Softwood Standard Windows 1500 Deep
Softwood Standard Windows 900 Deep
Softwood Windows 1050 Deep
Softwood Windows 1200 Deep
Soldier Course
Stairs for Decking
Stone Cavity Wall
Stone Faced Cavity Block Wall
Straight Flight Staircase

Decking
Decorating Plant
Decoration Sundries
Decorative Finishes
Deep Manhole
Demolition of Walls
Dentil Course
Design Costs
Dog Tooth Brickwork
Double Doors Glazed
Double Fire Doors
Double Fire Doors Glazed
Double Garage Door
Double Panel Doors
Double SA Doors
Drain Runs
Drainage Plant
Electrical Sockets
Encased Fabricated Steel Beam
Encased Fabricated Steel Post
Encasing to Fabricated Steel Beam
Encasing to Fabricated Steel Post
Extension Slab
External Cavity Block Wall
External Door Decoration
External Lighting and Door Bell
External Renovation
External Renovation Plant
External Wall Decoration
External Window Decoration
Fabricated Steel Beam
Fabricated Steel Post
Feature Brickwork
Post and Wire Fencing
PVCu 1200 French Door
PVCu 1500 French Door
PVCu 1800 French Door
PVCu 1800 Patio Door
PVCu 2100 Patio Door
PVCu 2400 Patio Door
PVCu Custom Size Window
PVCu Custom Size Window for Dormer
PVCu Front Door
PVCu Rear Door
PVCu Replacement Window
PVCu Standard Bay Windows
PVCu Standard Walk-In Bay Windows
PVCu Windows 1050 Deep
PVCu Windows 1050 Deep for Dormer
PVCu Windows 1200 Deep
PVCu Windows 1200 Deep for Dormer
PVCu Windows 900 Deep For Dormer
Quarter Turn Staircase
Radiator Decoration
Removal of Concrete Slab
Removal of Floorboards
Removal of Plaster Ceilings
Renovation Slab
Replace Existing Floorboards
Replacement Door and Casing
Replacement Fire Doors
Replacement Panel Doors
Repointing Brickwork
Roof Decoration
Roof Renovation
Structural Opening
Structural Opening to New Wall
Structural Steelwork
Stud Wall
Subcontract Quotations
Suspended Floor
Suspended Timber Ground Floor
Tapered End Architectural Stone Head
Tapered End Architectural Stone Head with Keystone
Tarmac Drive
Tile Cladding
Tiled Dormer Walls For Flat Roof
Tiled Dormer Walls For Hip Roof
Tiled Dormer Walls For Slope Roof
Tiled Sides for Wall Dormer
Tiling and Roofing
Timber Frame Panel
Timber Frame Panel For Gable
Toothing in of Brickwork and Blockwork
Traditional Brick Coping
Truss Roof Attic Interior Conversion
Turfing
Typical Fire Doors
Typical Panel Doors
Underpinning with Shuttering
Underpinning without Shuttering
Universal Cut Roof
Universal Truss Roof
Utility Room Fitting Out
Volume
Wall Starters
Window

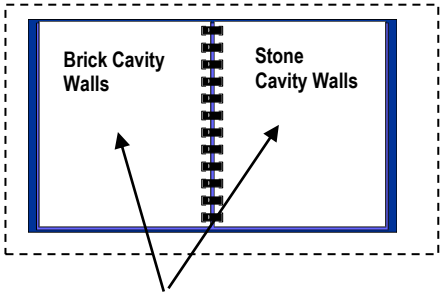
UNDERSTANDING THE DIFFERENT TYPES OF WORKBOOKS

The **Workbooks** supplied as standard with **EstimatorXpress®**, can be categorised as one of four types. Each of these **Workbooks** works in a slightly different way to automate and create as much flexibility within the system as possible. It is recommended that you study the different types of **Workbook** to understand their different structures and they how they fit together within the program.

THE SPECIFICATION LINKED WORKBOOKS

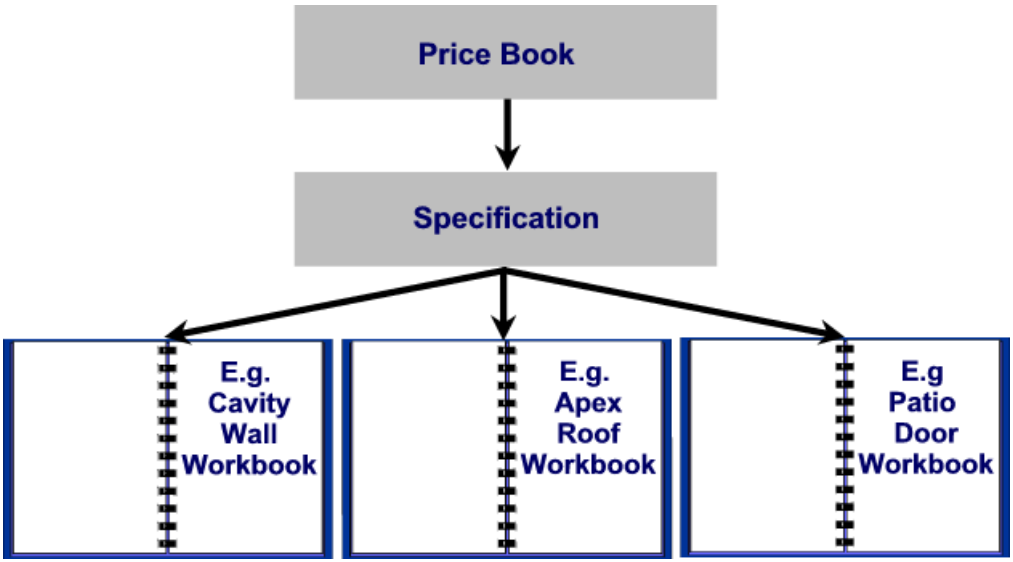
The **Specification Linked Workbooks** deal with the main fabric of a house. They include Cavity Walls, Block Walls and Roofs. These **Workbooks** carry out the detailed and complex calculations of the house. For example, the roof **Workbooks** will, with just a few basic dimensions, calculate all of the roof geometry including working out rafter lengths, roof areas and gutter requirements and then estimate all the labour, materials and plant required.

The **Specification Linked Workbooks** are, as the name suggests, linked to the **Specification**, and automatically **"**look up**"** the standard **Material**, **Labour** and **Plant** resources defined in the **Specification**.



Brick and Stone Cavity Wall Worksheets in Cavity Wall

A **Workbook** can contain several **Worksheets**. For example, you may wish to estimate two different types of cavity wall in one **Job** such as front cavity walls finished in stone and rear cavity walls in brick. You will need two separate **Worksheet**s, one for the front and one for the rear, each **Worksheet** reflecting the different materials used in the walls.



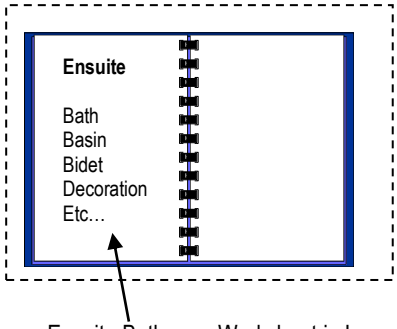
Note that the **Specification Linked Workbook** "looks up" the materials from the **Specification**

THE COMPOSITE ITEMS WORKBOOKS

Composite Items Workbooks deal with the highly variable elements of a house and are simply a list of resources that go to make up the cost of any random selection of resources. Examples of **Composite Items Workbooks** include **Fitted Kitchen**, **Bathroom and Cloaks** and **Electrical Sockets**.

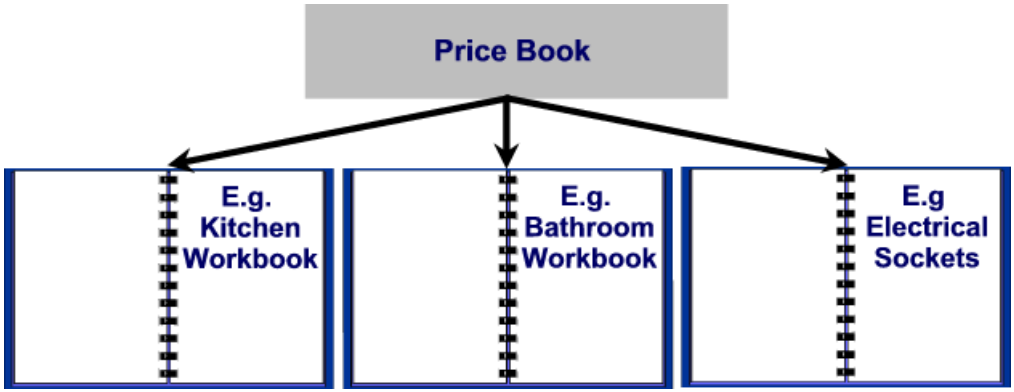
Based on a **Composite Items Workbook** you could create your own **Composite Item Workbook** for the cost of fitting out a luxury ensuite bathroom comprising for example:

- Bath
- Basin
- Bidet
- Paint
- Labour Costs…



Ensuite Bathroom Worksheet in Luxury Bathroom Workbook

NOTE: The **Composite Items Workbook** is not dependent on the inputting of dimensions but entering quantities. Other **Composite Items Workbooks** include items such as Bathrooms, Kitchens and Staircases. Note also that this type of **Workbook** is **not** linked to the **Specification**, as **Materials** and other resources contained in a **Composite Items Workbook**, are by their nature completely "free form" and not governed by the general **Specification**.



Note that the **Composite Items Workbooks** are a selection of resources chosen from the **Price Book**

THE NON-SPECIFICATION LINKED WORKBOOKS

The **Non-Specification Linked Workbooks** are linked to a range of calculators provided within **EstimatorXpress®**, and provide a variety of complex calculations for items such as manholes, fencing, patios, chimneys, plaster patching and other renovation items.

The **Non-Specification Linked Workbooks** are used to estimate quantities and list resources for elements of the build which have **not** been defined in the **Specification**.

THE AREA, PERIMETER AND VOLUME WORKBOOKS

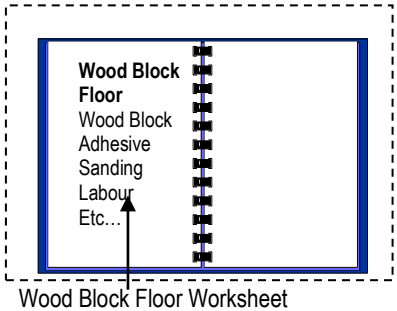
The **Area, Perimeter** and **Volume Workbooks** are provided so that the user can easily create their own calculators based on area, length and volume. They are linked to a calculation tool provided with **EstimatorXpress®**, which works out the area, length and volume of different shapes and multiplies the unit costs by the calculated areas.

Based on an **Area Workbook** you could create your own **Workbook** for costing a wood blocked floor comprising:

- Wood Blocks
- Adhesive
- Sanding
- Labour

In this way, you can quickly build up your own **Library o**f **Workbooks** for the specific **Job**s you encounter.

NOTE: The **Area, Perimeter** and **Volume Workbooks** are **not** linked to the **Specification**, as Materials and other resources contained in the **Area, Perimeter** and **Volume Workbooks**, are by their nature completely "free form" and not governed by the general **Specification**.

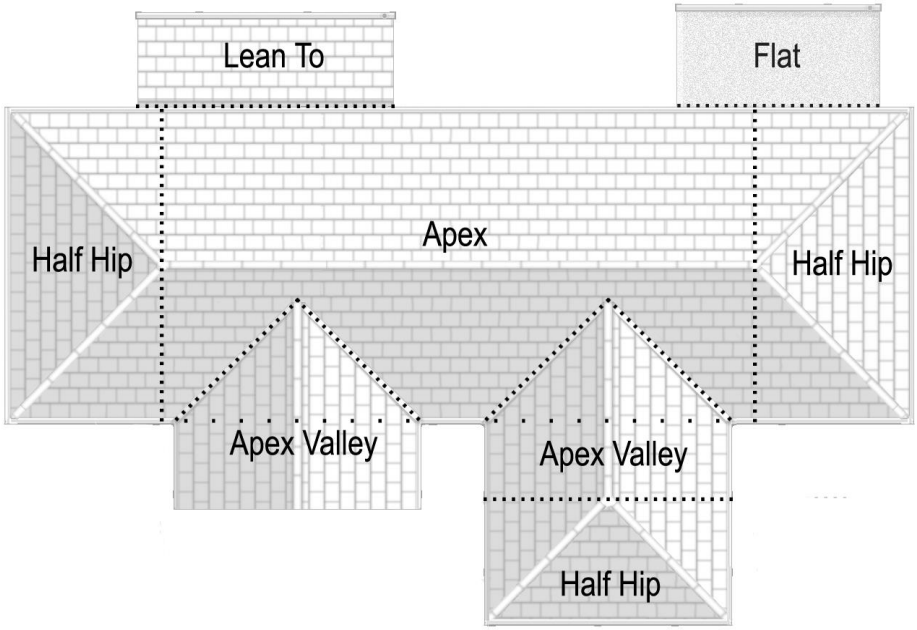


Wood Block Floor Worksheet
in Block Floor Workbook

Note that the **Area**, **Perimeter** and **Volume Workbooks** are a selection of resources you have chosen from the **Price Book.**

ESTIMATING ROOFS WITH ESTIMATORXPRESS®

EstimatorXpress® can estimate any complex roof structure. Simply break up the roof into sections of **Apex**, **Lean-to**, **Hip End**, **Apex Valley** and **Flat roofs**. The image below demonstrates how to divide a complicated roof structure into its constituent parts for estimating:



You then estimate each section of roof in the relevant **Workbook**, depending on whether you are cutting and fixing the timbers manually or purchasing roof trusses:

Cut Roof	**Truss Roof**
Apex Roof	Apex Truss Roof
Apex Valley Roof	Apex Valley Truss Roof
Half Hip Roof	Half Hip Truss Roof
Lean To Roof	Lean To Truss Roof
Flat Roof	

Additionally, there are two **Workbooks** that will estimate an entire roof in one: **Universal Cut Roof** and **Universal Truss Roof**. These **Workbooks** require you to take off quantities manually for the different sections of roof.

Re-roofing tasks can be estimated using the **Tiling and Roofing Workbook**.

PRINCIPLES OF ESTIMATING

For a full discussion of estimating techniques, you would need to study an entire book! However, for the purposes of this Tutorial we will take only a couple of pages to discuss the basic principles.

- It is important that you understand the concept of **Production / Usage Factors** as they are at the heart of **EstimatorXpress®**.

- When estimating any build costs, you need to break down the various elements of the build into measurements of length, area, volume or simply a list of components such as doors, lintels, and furniture...

Example: Estimating The Cost Of Floor Joists

Consider the situation where you are estimating the cost of supplying and fixing floor joists. Clearly, you are interested in the number of metres used and the unit cost of fixing that joist.

Assume that you have a joist, 3.6 metres long. The cost of supplying and fixing the joist would be dependent on the size of the joist.

The size of the joist is normally defined in the **Specification**. The raw material **Purchase Cost** of the joists will be looked up from your **Price Book**.

In this example, the joists are purchased at £200.00 per hundred metres. To convert the **Purchase Cost** to the **Estimate Rate,** i.e. how much it costs per metre run, we need to apply the **Production / Usage Factor** of 1/100 = **0.01** to convert from hundreds of metres to metres thus:

Estimate Rate for Joists	=£200.00 x 0.01	=£2.00 per metre
The cost of the material	=3.6m x £2.00	=£7.20 each

To calculate the cost of labour to fix the joist is a similar process in that the labour **Purchase Cost** for a joiner might be, say, £12.00 per hour. However it might only take the joiner 5 minutes to fix each metre of joists, i.e. 5 minutes/ 60 minutes = **0.0833** of an hour per metre.

This rate of production is again described in **EstimatorXpress®** as the **Production / Usage Factor**.

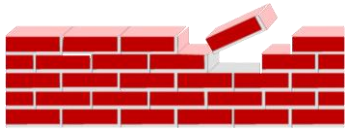
The **Estimate Rate** for fixing the joists	=£12.00 x 0.0833	=£1.00 per metre
The cost of fixing each joist	=3.6m x £1	=£3.60 each

Accordingly the total cost for supplying and fixing the 3.6 m long joist will be, ignoring any wastage of Material or time,

£7.20 + £3.60 = £10.80 each.

(**EstimatorXpress®** contains various templates, which will calculate the lengths and quantities of joists required and apply the unit costs and **Production / Usage Factor** appropriately.)

Example: Estimating The Cost Of A Brick Wall



Let's now consider something a little more complicated, say, a single ½ brick wall.

Let's assume we have a wall, 3 metres long by 2 metres high.

Clearly the area of this wall will be:

Area of Wall =3m x 2m =6 m^2

The type of brick will normally be looked up from the **Specification** and its associated **Purchase Cost** from the **Price Book**.

The number of bricks per square metre of wall is normally around 60 to the square metre. In this example, assume a cost of £0.25 per brick. To convert the **Purchase Cost** to the **Estimate Rate**, i.e. how much it costs per m^2, we need to apply the **Production / Usage Factor** of **60** to convert single bricks to m^2.

Estimate Rate for bricks =£0.25 x 60 =£15.00 per m^2

The cost of the material =6m^2 x £15.00 =£90 total cost

(Again, wastage has been ignored)

Let's have a close look at pricing up the labour for our brick wall. The simplest way to tackle this is to pay the bricklayer per brick, or per thousand bricks. For example if the bricklayers are being paid, say, £300 per thousand bricks, then the **Production / Usage Factor** per square metre would be:

Production / Usage Factor =60/1000 =0.06

Accordingly the labour cost for the wall would be:

Estimate Rate for laying the bricks =£300 x 0.06 =£18.00 per m^2

The cost of laying the bricks =6 m^2 x £18.00 =£108 total cost

The total cost of the wall, excluding wastage (and mortar!) would be

£90 +£108 = £198.00

(**EstimatorXpress®** contains various templates, which will calculate the area of bricks required and apply the unit costs and **Production / Usage Factor** appropriately.)

NOTE: In **EstimatorXpress®** we always relate **Estimate Rates** to hourly rates for consistency and to avoid having to enter multiple rates for any particular trade. For example let's assume the bricklaying gang is costing £30.00 per hour. Also, assume that we are targeting an **Estimate Rate** of £18.00 per square metre, in these circumstances:

Estimate Rate for laying the bricks=£30 x 0.6 (**Production / Usage Factor**)=£18.00 per m^2

The cost of laying the bricks =6m^2 x £18.00 =£108 total cost

EXTENSION TUTORIAL

This chapter is designed as a "hands-on" Tutorial for people with no experience of using **EstimatorXpress®** for Excel 2007/2010/2013/2016. It assumes you are an absolute beginner, and gives you explanations and step-by-step guides to:

- Downloading the latest Material prices from hbxl.co.uk
- Creating your own **Specifications**
- Estimating with **EstimatorXpress®**
- Producing **Bar Charts**
- Producing **Reports**
- Producing **Customer Quotations** (**Total Toolkit** edition only)

This tutorial takes you through estimating an extension (see diagrams on page 25) and demonstrates the basic procedures of **EstimatorXpress®**.

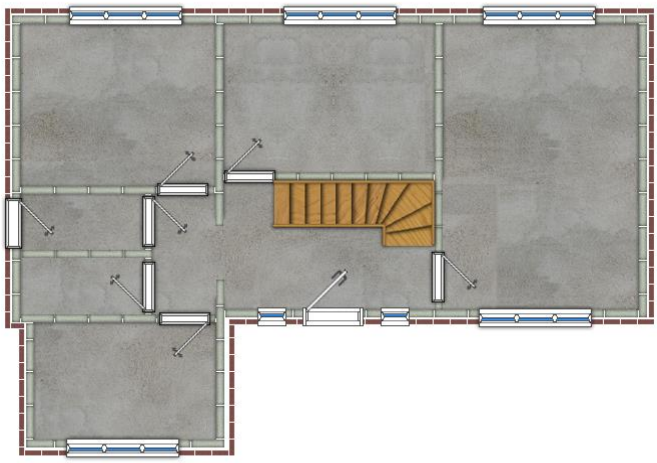
The time required to complete each section is indicated in minutes at the introduction. The whole Tutorial should take approximately 2-3 hours to complete.

When working through the Tutorial you are strongly advised that once you start a particular section, you continue it until it is complete. At the end of each section, you will be shown how to exit **EstimatorXpress®**, should you wish to.

EXTENSION PLAN

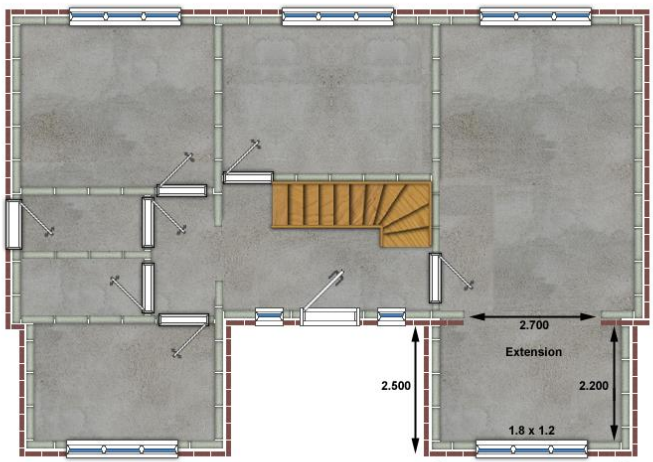
Below is a basic plan of the extension that you will be estimating throughout the Tutorial. You will need to refer back to this drawing. All dimensions on the plan are given in metres.

ORIGINAL HOUSE GROUND FLOOR



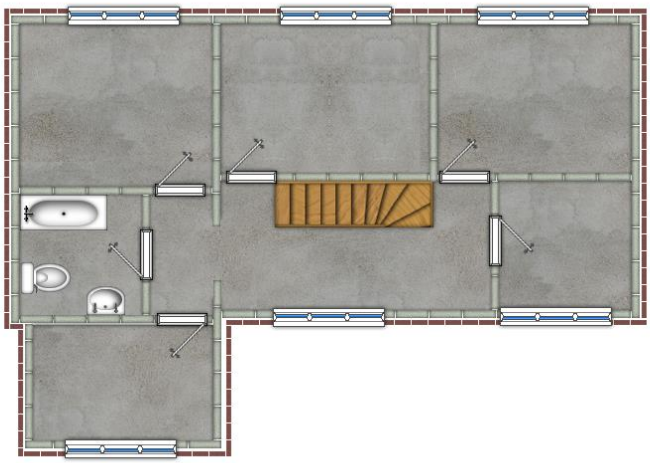
NOT TO SCALE

EXTENDED HOUSE GROUND FLOOR



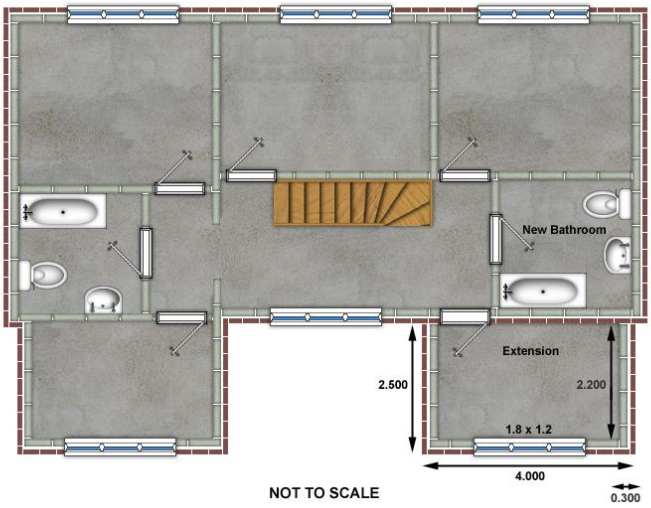
NOT TO SCALE

ORIGINAL HOUSE 1st FLOOR



NOT TO SCALE

EXTENDED HOUSE 1st FLOOR



NOT TO SCALE

EXTENSION ELEVATION

This diagram shows the front elevation of the Extension that you will be estimating during the Tutorial. You may need to refer to this during the exercises.
All dimensions on the plan are given in metres.

NOT TO SCALE

LAUNCHING ESTIMATORXPRESS® & THE MAIN MENU

[1] To launch **EstimatorXpress®** either double-click on the **EstimatorXpress®** icon on your desktop or select **EstimatorXpress®** from the Start, Programs Menu.

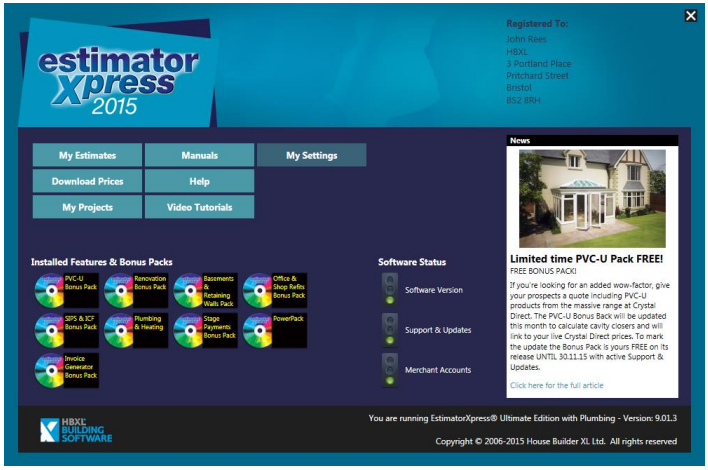
[2] Once the program starts to open, depending on your system settings, you may need to press **Enable Macros** button on the Microsoft Excel virus protection dialog box.

Once you have launched **EstimatorXpress®**, the **Main Menu** will appear (see screen shot below).

My Estimates opens the estimating module of **EstimatorXpress®**.

Download Prices allows you to download the latest price updates from **www.HBXL.co.uk Website**. If you have an **HBXL Merchant Trade Account** you may also be able to download your personal discounts to your **Price Book**. Please see page 8 for more information.

My Settings opens the **My Settings** menu which provides access to all of the **Libraries** of information which underpin the **Estimates.** From here you can view and edit **Price Books, Specifications, Workbooks, Groups of Workbooks, Bar Charts, Reports, Profit Margins, Inflation Rates** and **My Favourites**.



Help allows you to access the Help System. This provides detailed 'How do I' questions and answers together with additional information about each screen. **EstimatorXpress®** Help can be accessed from most screens by clicking the Help button or by pressing the F1 key on your keyboard.

My Projects transfers you to the **My Projects** screen. **Projects** are groups of **Jobs** linked together to form a project. You will not need this button to complete the Tutorial. This feature is only available with the Total Toolkit edition.

TIP: If the **Main Menu** does not appear please see page **Error! Bookmark not defined.** for details about setting you macro security levels.

SETTING UP ESTIMATORXPRESS®

Before creating an **Estimate**, we are going to introduce you to the **Price Book**. We are also going to look at creating a new **Specification** based upon the **Specifications** supplied as standard with **EstimatorXpress®** to reflect your method of construction.

DOWNLOADING LATEST MATERIAL RATES INTO ESTIMATORXPRESS®

5.00 Minutes

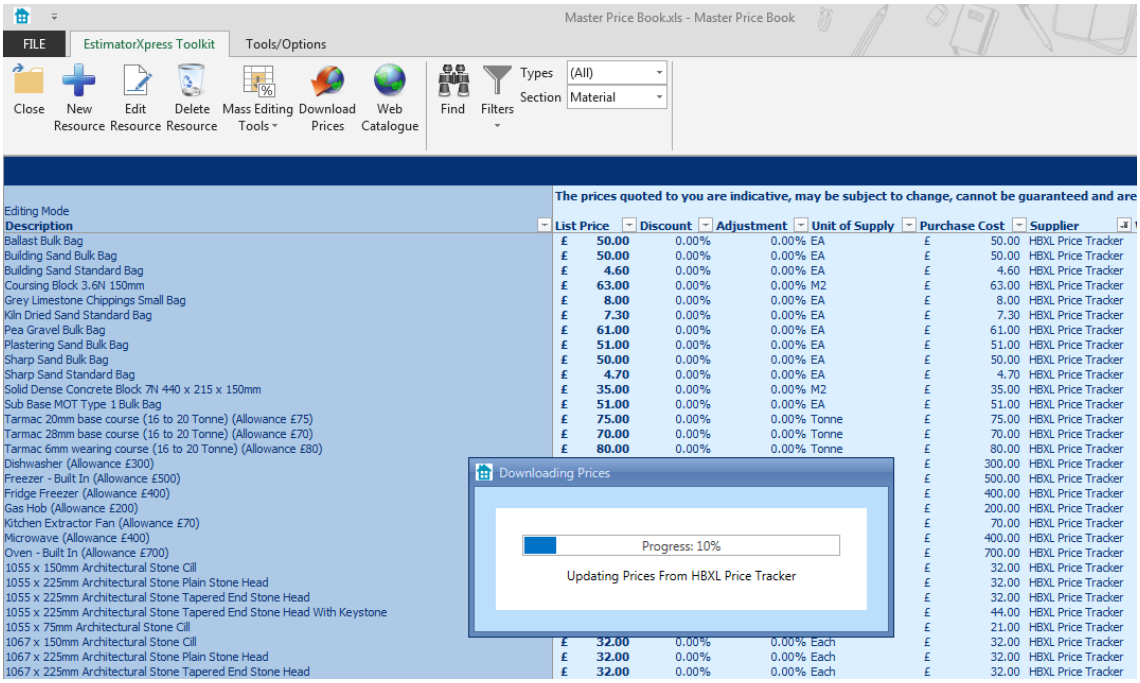
This exercise will lead you through downloading latest prices from our on-line catalogue, which is the key to accurate estimating. These generic prices are kept up to date using HBXL **Price Tracker** technology.

NOTE: You must have a valid subscription to Support & Updates in order to maintain your Price Book by downloading latest prices using Price Tracker. You may also be able to download products from our Merchant Partners' catalogues if you have a Trade Account and have subscribed for this additional service. Please see page 8 for more details.

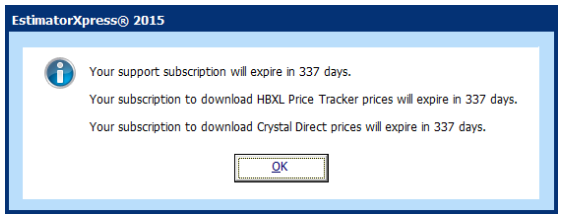
[1] Having launched **EstimatorXpress®** the **Main Menu** screen will appear.

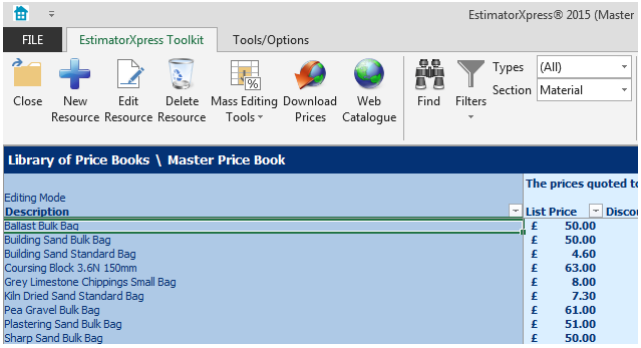
Click the **Download Prices** button.

[2] You will now see a list of all of the **Materials** supplied as standard with **EstimatorXpress®.** A dialog box may pop up asking you if you are currently logged on to the Internet. If the dialog box pops up check you are connected to the Internet and click **OK**.



[3] After the Price Download progress bar reaches 100% you will see a window pop up informing you of your support expiry date as well as the expiry dates for all merchant accounts.





For more information on downloading and applying Merchant Terms to your prices (if applicable) click Help or press the F1 key on your keyboard. Please see page 8 for information on access to Merchant catalogues.

1. To close the **Master Price Book** press the **Close** button, you are returned to the **Main Menu**.

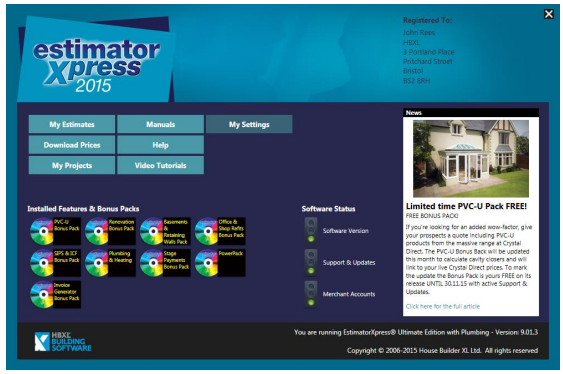
SELECTING NEW MATERIALS FROM THE HBXL WEBSITE

5.00 Minutes

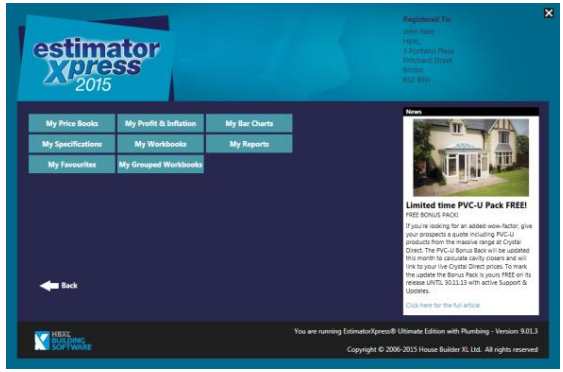
This exercise will lead you through selecting additional products from the Merchant Catalogue(s) on www.hbxl.co.uk to download into your **Master Price Book**. If you do not want to select additional products at this time, go to page 34 to create a new product in your **Price Book**.

NOTE: To download additional material prices @ www.hbxl.co.uk, you must have a valid subscription to Support & Updates and be the holder of a Trade Account with one of our Merchant Partners. See page 8 for more information.

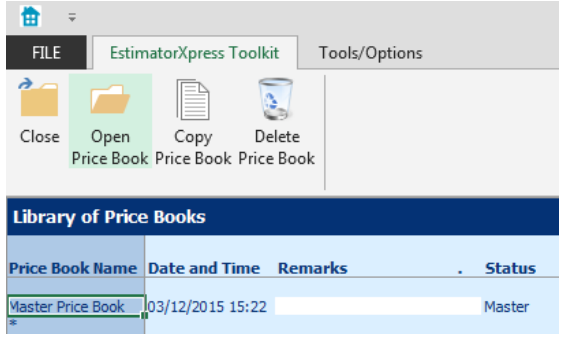
[1] From the **Main Menu**, click on **My Settings.**



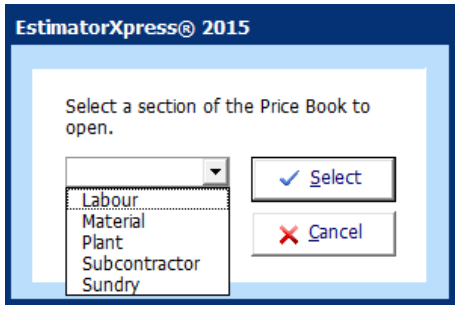
[2] From the **My Settings Menu,** click on the **My Price Books** button.



[3] Select the **Master Price Book** with your mouse and then click the **Open Price Book** button.

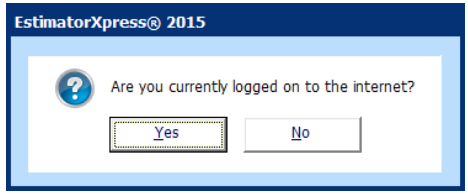


[4] A dialog box will pop up asking you which part of the **Price Book** you wish to open. Select **Materials** and click **Select.**



[5] To select new Materials from www.hbxl.co.uk in order to download them into your **Master Price Book**, click on the **Web Catalogue** button.

[6] A dialog box might appear asking you if you are currently logged on to the Internet.



If it does, check you are connected to the Internet and click **Yes**.

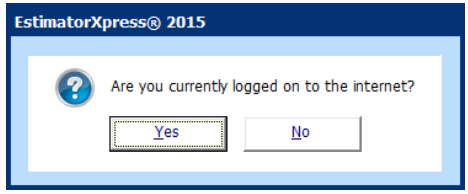
If you click **No**, the procedure will be cancelled.

[7] You will now be automatically transferred to www.hbxl.co.uk where you should simply follow the on screen instructions, which involves selecting the items you want to download into your **Price Book**.

EstimatorXpress®'s website www.hbxl.co.uk will now store the items you have selected until you are ready to download them into your PC during your next price download. You can now close you web browser and return to **EstimatorXpress®** software.

[8] To download your newly selected new products to the **Master Price Book** of your **EstimatorXpress®** software click the **Download** button from inside the **Master Price Book** or press the **Download Prices** button from the **Main Menu.**

[9] A dialog box might appear asking you if you are currently logged on to the Internet.



If it does, check you are connected to the Internet and click **Yes**.

If you click **No**, the procedure will be cancelled.

[10] **EstimatorXpress®** will now download the products to your computer.

[11] Your **Price Book** now contains the item(s) you selected and will have updated all other web-linked products in your **Price Book**.

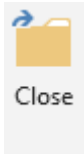
From now on, each time you download prices from www.hbxl.co.uk, the prices for these products will be refreshed.

For more information on updating the prices of web-linked resources, click Help or press the F1 key on your keyboard. This service is only available with a valid Support & Updates subscription and a Trade Account

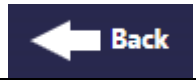
with one of our Merchant Partners. An additional fee may be payable. Please contact HBXL for more details Tel. 0117 916 7899.

1. To close the **Master Price Book** press the **Close** button, you are transferred to the **Library of Price Books**.

2. Press the **Close** button again to return to the **My Settings Menu** .



3. In **My Settings Menu**, press the **Back** button to return to the **Main Menu**.



IMPORTANT REMINDER:

Now you have ensured that the Materials rates are up to date in the Materials section of your Price Book, you should also visit the Labour, Plant, Subcontract and Sundry sections to ensure that their rates reflect your local conditions.

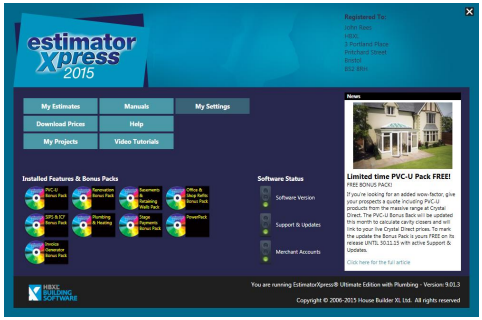
By ensuring the Library Price Book is up to date, all estimates created in the future will contain your accurate prices.

CREATING A NEW PRODUCT IN YOUR PRICE BOOK

5.00 Minutes

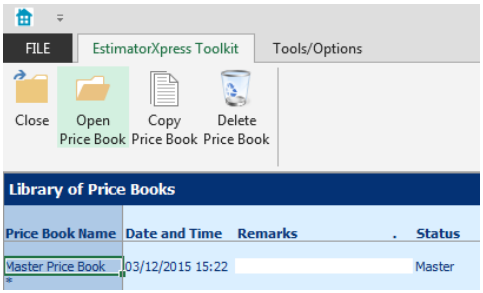
This exercise will lead you through manually creating a new product to add to your **EstimatorXpress® Price Book.** If you do not want to create additional products at this time, go to page 37 to create your **Specification**.

[1] From the **Main Menu,** click on **My Settings.**



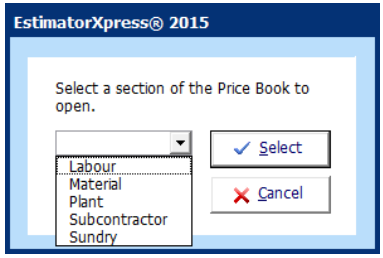
[2] From the **My Settings Menu,** click on the **My Price Books** button.

[3] Select the **Master Price Book** with your mouse and then press the **Open Price Book** button.

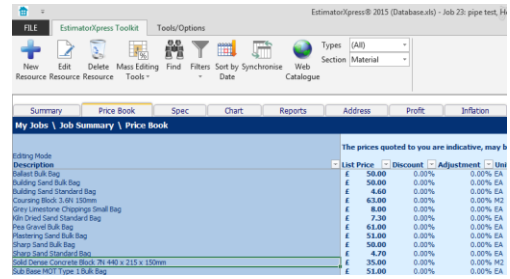


[4] A dialog box will pop up asking you which part of the **Price Book** you wish to open. For this example, select **Materials** and click **Select.**

N.B. You can follow the same steps described in this exercise to add new products to the **Labour, Plant, Subcontractor** and **Sundry** sections of the **Price Book**.



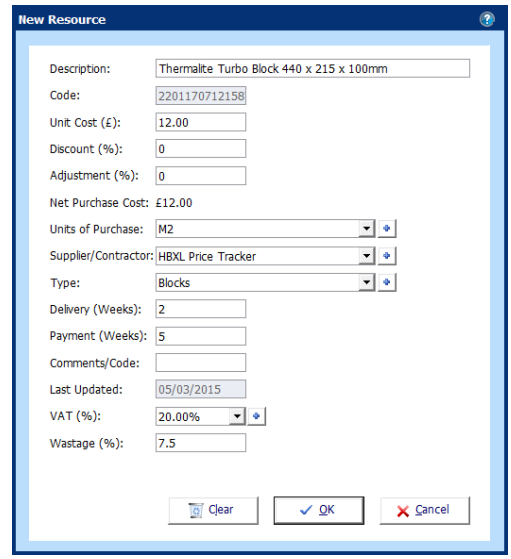
[5] First, select a product similar to the product you wish to create. For example, to add a new block to your **Price Book**, click on "**Solid Dense Concrete Block 7N 440 x 215 x 100mm**" with your mouse.



TIP: Use the **Find** button or the **Filters** near the top of the screen to help you find items in the **Price Book.**

[6] In the toolbar, click on the **New Resource** button.

[7] A dialog box pops up containing information about the product you selected to use as a template for your new product.



[8] Type over the **Description** field in the dialog box with the name of your new product, in this case "**Thermalite Turbo Block 440 x 215 x 100mm**".

[9] Enter the **Unit Cost** and any **Discount** or **Adjustment.**

[10] Select the **Unit of Purchase,** the **Supplier**, the product **Type.**

NOTE: To add a new **Supplier** to your **Price Book,** click on the **Add** button next to the **Supplier/Contractor** drop down box.

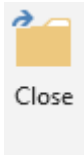
[11] Enter **Delivery** and **Payment** times.

[12] Finally, check the **VAT** and **Wastage** rates and click **OK** to save your new product.

This new product will now be available to use in all future **Jobs.**

1. To close the **Master Price Book** press **Close** button, you are transferred to the **Library of Price Books**.

2. Press **Close** button again to return to the **My Settings Menu**



3. In **My Settings Menu**, press **Back** button to return to the **Main Menu**.

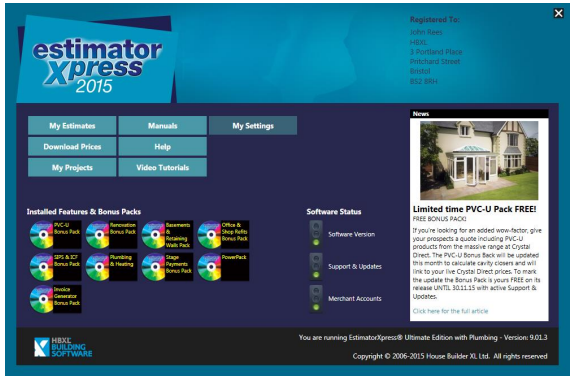
CREATING A SPECIFICATION

15.00 Minutes

Having downloaded latest materials prices from **EstimatorXpress®**'s on-line catalogue and added your own products into your **Price Book**, it is now important to tailor the **Specifications** supplied as standard (**New Build, Timber Frame, Extension, Renovation** and **Site Fabricated Timber Frame**) or create your own **Specifications** to contain your choice of **Materials**, **Labour** and **Plant**, e.g. the blocks you typically like to use and their usage factor. By making and saving your preferences early on, you will avoid having to make repetitive adjustments when estimating future **Jobs**. This is particularly useful if you repeatedly build houses or extensions of a similar 'style' or **Specification**.

This exercise will lead you through the creation of you own **Specification**.

[1] From the **Main Menu** press **My Settings.**

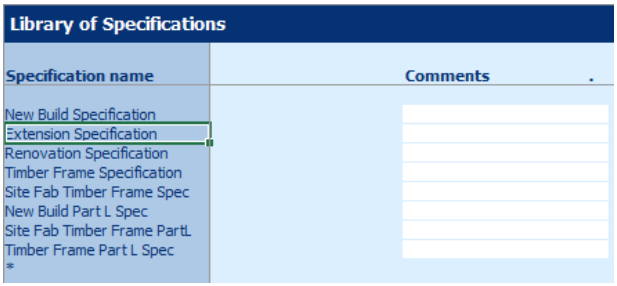


[2] From the **My Settings** menu, press **My Specifications**.

[3] A dialog box pops up asking you which **Price Book** you wish to use in the **Specification**. (This dialog won't pop up if you only have one **Price Book** - **EstimatorXpress®** automatically selects the one available **Price Book**).

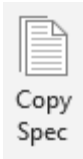
If the dialog box pops up, select **Master Price Book** and click **OK.**

You are transferred to the **Library of Specifications**.

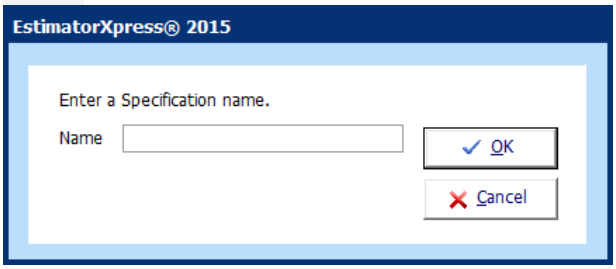


EstimatorXpress® is provided with eight standard **Specifications** within the **Library of Specifications**. These are **New Build, Extension**, **Renovation, Timber Frame**,**Site Fabricated Timber Frame, New Build Part L, Site Fab Timber Frame Part L and Timber Frame Part L** each containing typical **Materials** and associated **Labour** and **Plant** for those types of construction.

[4] Select **Extension Specification** from the left hand side of the screen to copy.



[5] Press **Copy Spec** button.

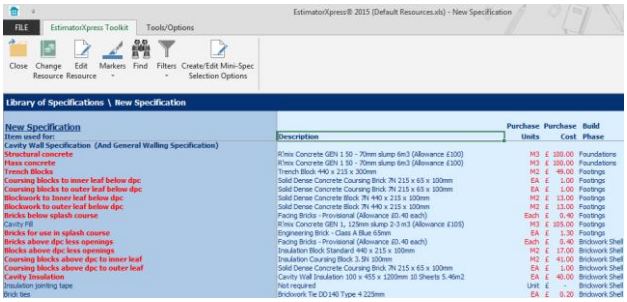


[6] A dialog box pops up asking you to name the new **Specification** you are creating.

Type **New Specification** or whatever name you think is suitable in the top white cell.

Click **OK** when complete.

You are transferred to your new **Specification**.

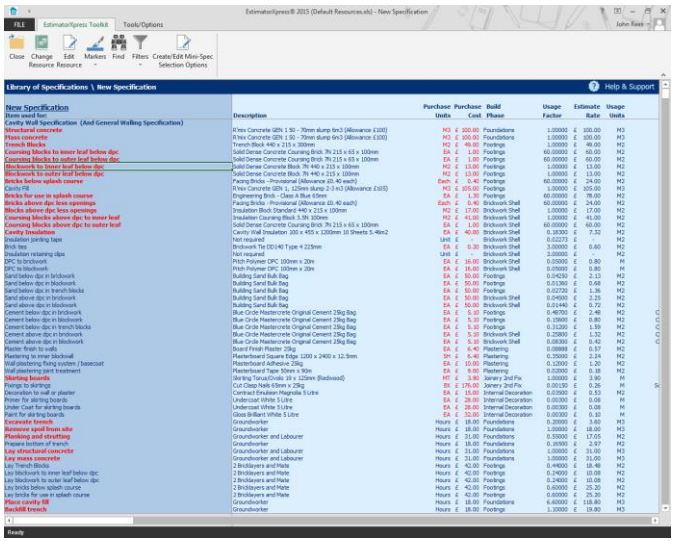


[7] In the **Specification** you have created, take a few moments to scroll across the screen. The screen is divided into several columns including the following:

Item Used For column, describing where in the build the resource will be used
Description column, describing the resource
Purchase Units column, describing the units in which you purchase the resource
Purchase Cost column, showing the price (looked up from the **Price Book**)
Build Phase column, describing what build phase the resource will be needed
Usage Factor column, describing the number required per unit e.g. how many needed per metre

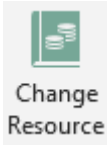
In your new **Specification** you can change the following:

The resource in the **Description** column
The resource's **Usage Factor**



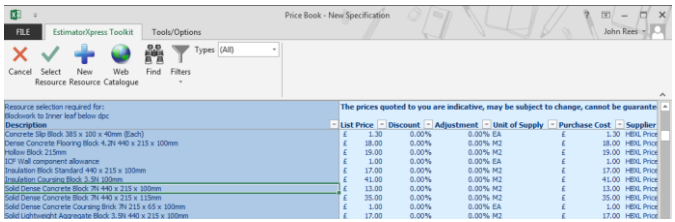
[8] Firstly we are going to look at choosing an alternative resource from the **Price Book** for use in your **Specification**.

Near to the top of the screen locate and click on the resource **Solid Dense Concrete Block 7N 440 x 215 x 100mm** which is used for '**Blockwork to Inner leaf below dpc**'.



[9] Press the **Change Resource** button.

The **Price Book** pops up over the top of the **Specification** to allow you to select an alternative resource.



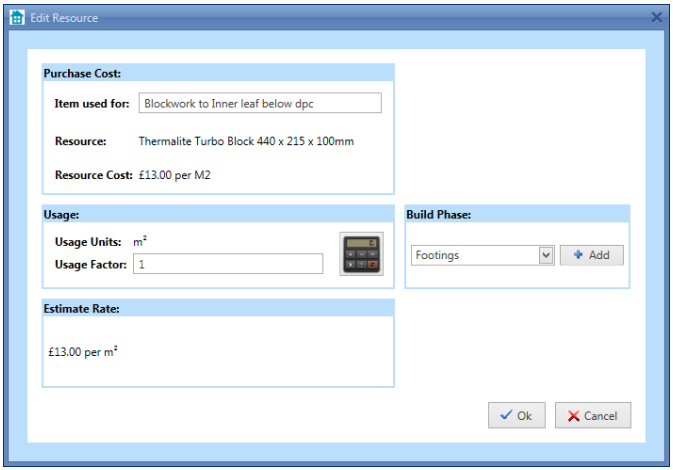
On the left hand side of the screen there is a column of all the resources currently available in this **Price Book** from which you may select your alternative resource.

[10] Select the alternative resource "**THERMALITE Turbo Block 440 x 215 x 100mm",** that you created in the section "Creating a New Product in your Price Book" on page 34.

(If you did not create this product, please simply select an alternative resource.)

[11] Press the **Select Resource** button to transfer the resource to your **Specification**.

TIP: You can use the **Find** button to help you find resources more easily in the **Price Book.**



A dialog box pops up.

Study the box for a moment.

The use of the resource is defined in the left hand corner of the dialog box. In this case as you previously selected a block for substitution in the footings it will say 'Blockwork to Inner leaf below dpc'.

Below this is the unit cost of the blocks together with the unit of supply.

Next are the units of usage, in this case, M2, as this is the unit of measurement that **EstimatorXpress®** uses when calculating this item.

As you are buying the blocks in M2 and using them in M2, then the usage factor is 1. For more information on **Usage Factors** see page 22.

TIP: To help you work out what **Usage Factor** you should enter, click on the **Usage Factor Calculator** button.

The final option available to you for this product is to define the product's **Build Phase**. This allows you to modify when you would prefer those materials to be on site.

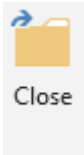
Click **OK.**

You are returned to the **Specification**. You will now see the new resource in the **Specification**.

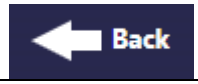
You will need to review all suggested items in the Specification (including Labour and Plant) to check that they accord with your own method of construction. Although this will initially take a little time, once you have set up your Specification, all your estimates will precisely reflect the way YOU work, saving you time in the long run.

1. Now your **Specification** changes are complete, to close and save your **Specification**, press the **Close** Button. You are transferred back to the **Library of Specifications.**

2. In the **Library of Specifications**, press the **Close** button to return to the **My Settings Menu**.



3. In **My Settings Menu**, press the **Back** button to return to the **Main Menu**.



IMPORTANT REMINDER:

The **Specification** you have just created has now been stored within the **Library of Specifications**.

It is important to be aware that each time you set up a new estimate, **EstimatorXpress®** will automatically make a **COPY** of your chosen **Specification** and place the **COPY** in your estimate. This **COPY** can be viewed or changed at any time by double clicking on the **Spec** tab from within a **Job**.

This means that you can make changes to the **Specification** for the **Job** in hand without altering your **Master Specification** that is stored in the **Library of Specifications** inside **My Settings.**

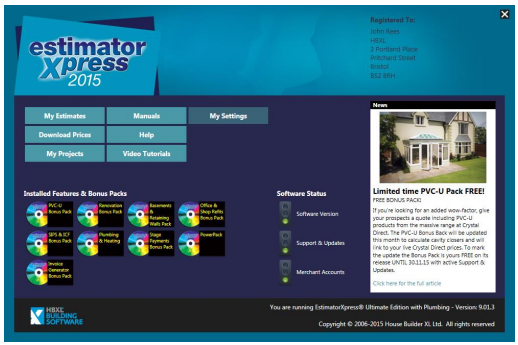
For additional Help press the help button or press the F1 Key on your keyboard.

CREATING THE EXTENSION ESTIMATE

5.00 Minutes

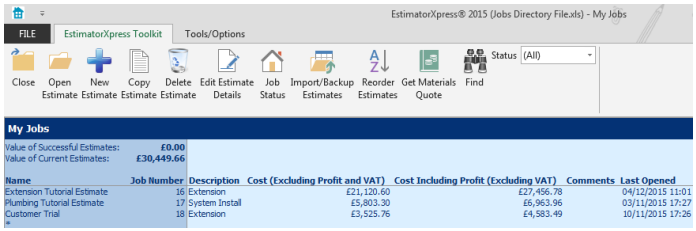
Let's start Estimating!

Having launched **EstimatorXpress®** the **Main Menu** screen will appear.

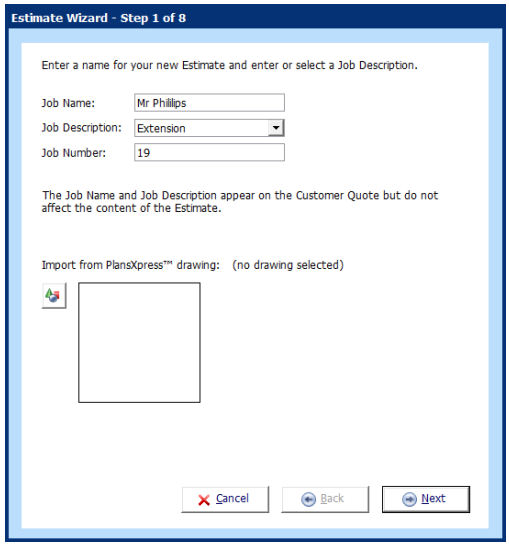


[1] To begin the Extension Demonstration Estimate, press the **My Estimates** button.

EstimatorXpress® transfers you to the **My Jobs Screen**. This is a list of all the **Jobs** you have estimated together with their estimated values and details of when they were last edited.

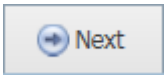


[2] To create a new **Estimate**, press the **New Estimate** button.

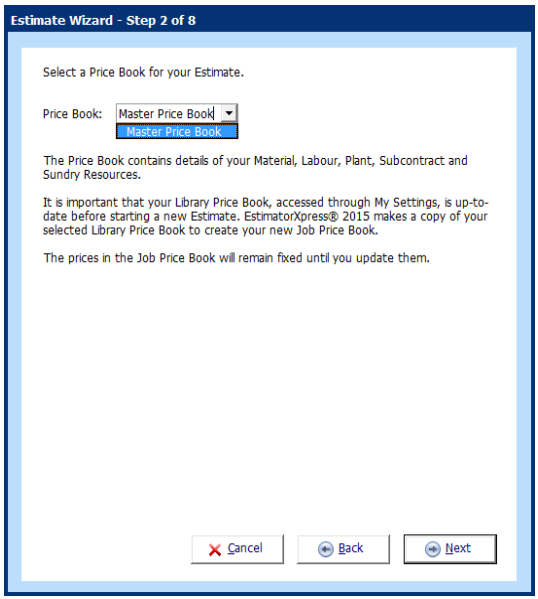


[3] A dialog box then pops up. Enter a name for your **Job**, for example, enter Mr Phillips.

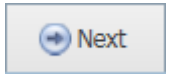
[4] Next give the **Job** a brief description from the drop-down menu. (This description simply helps to describe the **Job** and does not affect the outcome of any calculations.)



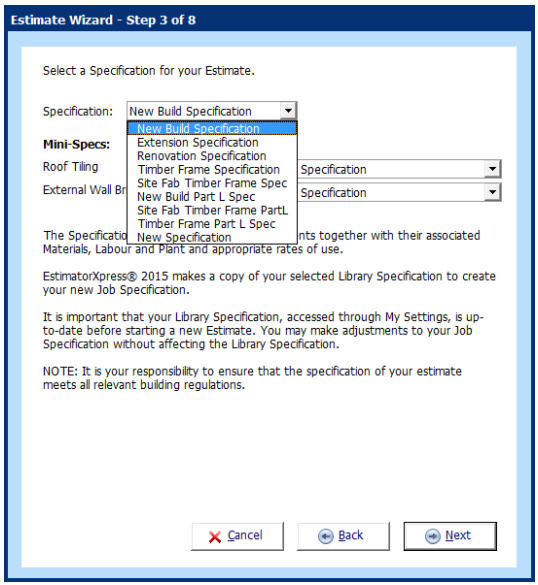
[5] Click **Next.**



[6] Now select the **Master Price Book** from the drop down menu by clicking on the down arrow. (When you purchase **EstimatorXpress®**, only the **Master Price Book** exists but you can also create your own if you are using Total Toolkit edition).



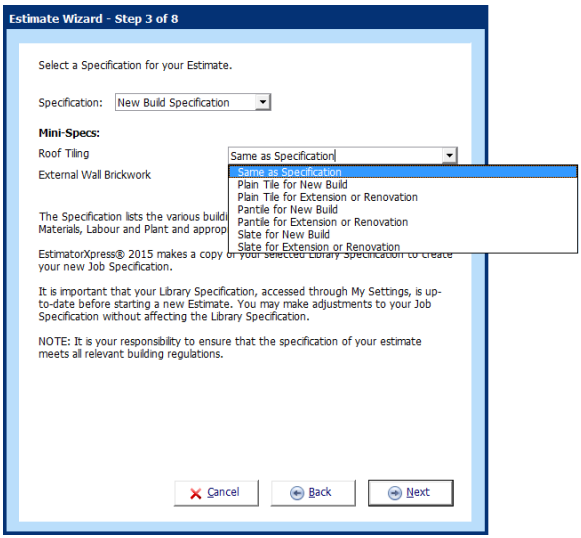
[7] When you have selected **Master Price Book** click **Next**.



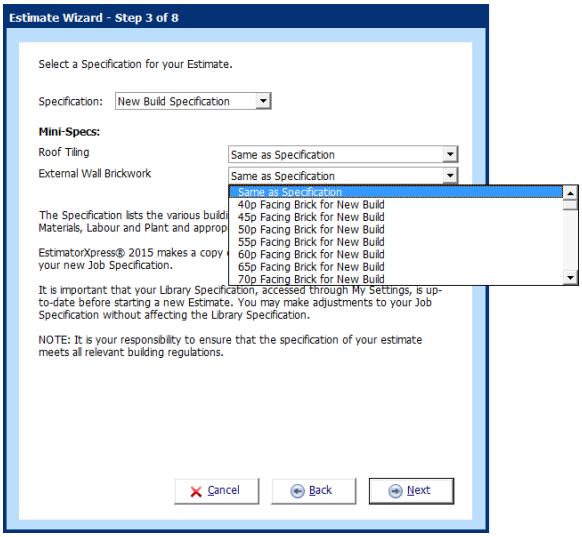
[8] Next, select a **Specification** for use in the Estimate.

The **Specification** is a list of resources chosen from the **Price Book**, which defines the materials, plant and labour used in the main fabric of the building.

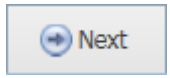
Select the **New Specification** that you created earlier in the tutorial (see page 37) from the drop down box in the dialog. (When you purchase **EstimatorXpress®**, a **New Build** (Brick & Block**) Specification**, **Timber Frame Specification, Extension Specification, Renovation Sepcification,** and a **Site Fabricated Timber Frame Specification** are included).

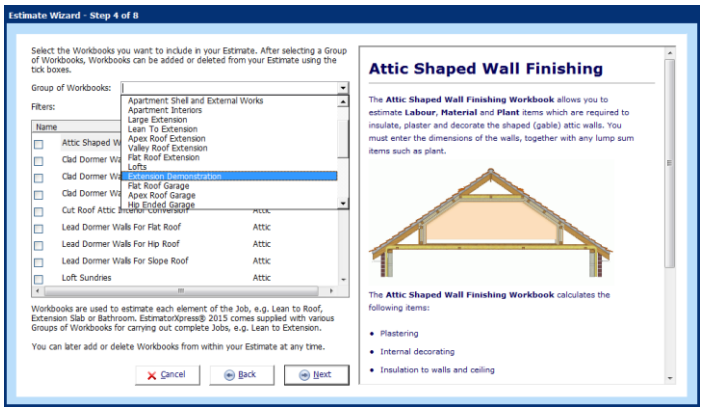


[9] The **Roof Tiling** drop-down box can be used to quickly change the tiles that are used within the roof workbooks in the estimate. For the moment leave this set as **Same as Specification**.



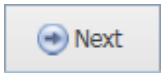
[10] The **External Wall Brickwork** drop-down box can be used to quickly change the type and cost of bricks used within the wall workbooks of the estimate. For the moment leave this as **Same as Specification**.

[11] When finished, click Next. 



[12] In the next dialog box, you are required to choose a **Group of Workbooks** or a bespoke set of **Workbooks** which most closely matches your **Job**. **Workbooks** are the estimating calculators of the system. In this case, select **Extension Demonstration** from the drop-down. Note that you can add or delete extra **Workbooks** to a **Job** by ticking or unticking the relevant check boxes in the list below.

The **Extension Demonstration** has been pre-prepared to include the main **Workbooks** you will need to estimate an extension. The **Extension Demonstration** includes **Workbooks** to cost cavity walls, slab, suspended floor, apex valley roof, structural opening, block walls, internal doors, drain runs, manhole and drainage plant, windows, and subcontractors.

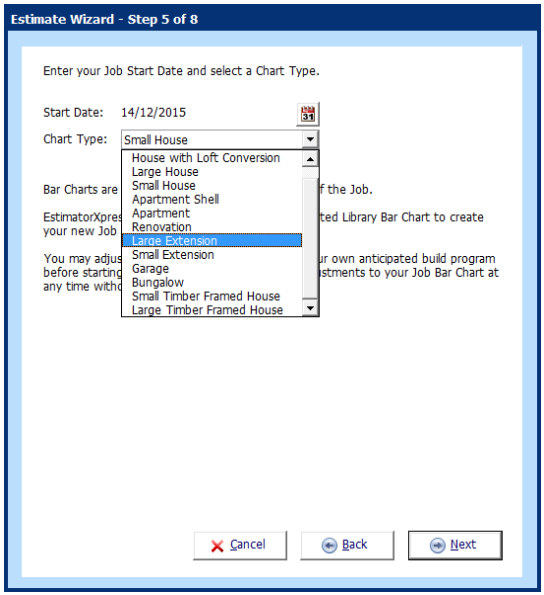


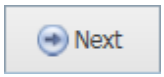
[13] When you have selected **Extension Demonstration** click on the **Next** button.

TIP: **EstimatorXpress®** comes with several **Groups of Workbooks** that include all the **Workbooks** that might need to be considered for estimating a house, a flat roof extension, an apex roof extension, typical renovation etc. You can also create your own **Groups of Workbooks** for the different types of work you carry out by visiting **My Groups of Workbooks** from inside the **My Settings Menu.** For example if you regularly build offices, you can create an office **Groups of Workbooks** which lists all of the typical estimating templates or **Workbooks** encountered whilst building offices.

For more information about Creating Groups of Workbooks, from the My Settings Menu click on My Groups of Workbooks button and press Help or press your F1 Key on your keyboard.

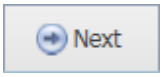
[14] Next enter a start date for your **Job** by clicking the calendar button and select a **Bar Chart** type from the drop-down box that will be used as a template to plan your **Job** later on.





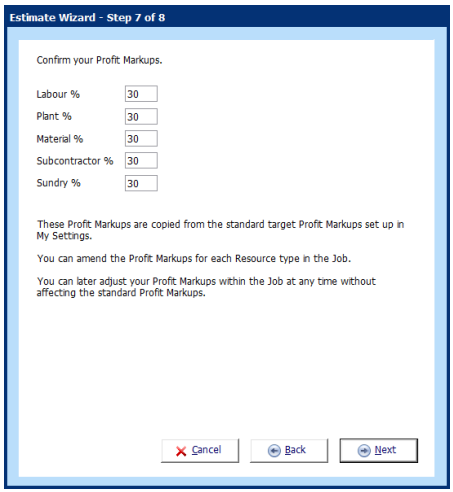
[15] Click **Next.**

[16] Now enter the Customer's **Name** and **Address Details**. These will appear on your printed quotation later should you choose to print one.

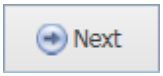


[17] You can skip this step if you wish by simply clicking **Next.**

NOTE: You can add or change these details from within the **Job** later on.

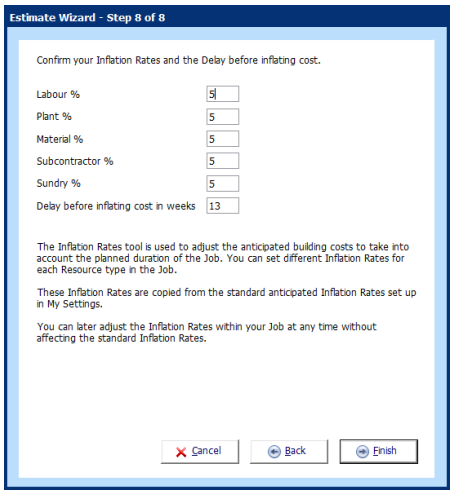


[18] Now confirm your target **Profit Margins** for this **Job**.



[19] Click **Next** when you are happy with them.

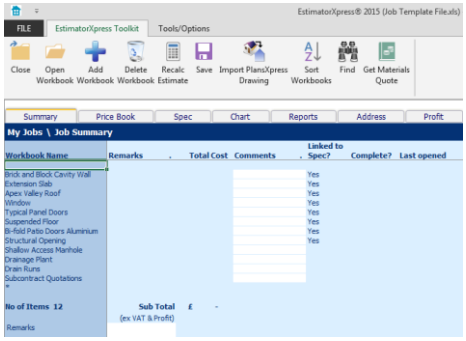
NOTE: You can edit the **Profit Margins** from within the **Job** later on.



[20] Now confirm any **Inflation Rates** you would like to apply to the **Job.**

[21] Click **Finish** to complete the creation of your **Job**. **EstimatorXpress®** will now build your estimate using the information you have entered.

NOTE: You can edit the **Inflation Rates** from within the **Job** later on.



[22] **EstimatorXpress®** then transfers you to the **Job Summary** screen. This screen provides an overall summary of the estimate.

From this screen, you can open individual **Workbooks** to estimate the various parts of your **Job**.

By clicking on the tabs along the top of the screen, you can also access the **Price Book** and **Specification** which have now been copied into your **Job**, access the **Bar Chart Planner** and **Report Manager** as well as modify the **Customer Address** details and change the **Job Inflation Rates** and **Job Profit Margins**.

Note that from within the **Price Book** tab inside a **Job**, you can also synchronise the prices being used in this **Job** with the **Master Price Book**.

Press Help or F1 Key on your keyboard for further details.

You have now assembled the basic elements for estimating the extension. You have:

- ✓ Named the **Job** and entered a **Customer Address**
- ✓ Selected a **Price Book**
- ✓ Selected a **Specification** (to tell **EstimatorXpress®** what **Materials**, **Labour**, **Plant**…to use in your Estimate)
- ✓ Chosen a **Group of Workbooks** (to tell **EstimatorXpress®** what elements are included in the Estimate)
- ✓ Specified a **Job Start Date** and selected a **Bar Chart**
- ✓ Set **Profit Margins** and **Inflation Rates**

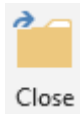
You are now ready to start estimating!

NOTE: EstimatorXpress® has made COPIES of the Price Book, Specification and Workbooks and transferred them into your Estimate, ensuring you do not damage the originals.

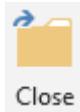
Any changes you make to the Price Book, Specification and Workbooks in your estimate *will not* affect the Master Price Book, Specification and Workbooks in their respective Libraries. Remember that the Master versions of the Price Book, Specification and Workbooks can only be viewed or modified using the My Settings Menu.

If you wish to stop and close the estimate you have created so far:

1. Press the **Close** button on the top left of the screen **Job Summary** Screen.



2. You will now be in the **My Jobs** screen. Close this screen, once again using the **Close** button.



3. You are now transferred to the **Main Menu** screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

ESTIMATING THE EXTENSION

BRICK & BLOCK CAVITY WALLS

30.00 Minutes

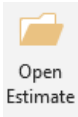
If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial. If you have joined this tutorial after having closed **EstimatorXpress®**, see the following steps:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

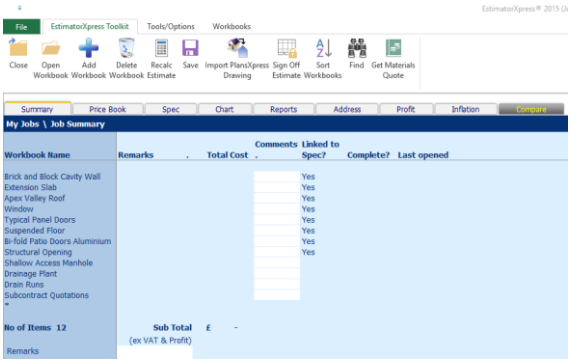
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



Now that you have set up the extension estimate, you can now start actually estimating. This exercise will lead you through the estimating of the **Brick & Block Cavity Walls** and **Gables** for the extension.

The **Brick & Block Cavity Wall Workbook** is an example of a **Specification Linked Workbook**, which is linked to the **Specification**. Notice that there is a **Yes** in the column **Linked to Spec?** to indicate this. As its name suggests, this means that it is populated with resources from the **Specification** (see page 18 for further explanation). To estimate the walls, you will enter your dimensions into the system and **EstimatorXpress®** will then schedule all **Materials, Labour** and **Plant** required and estimate their associated costs. The **Brick & Block Cavity Wall Workbook** will estimate the foundations, blockwork, brickwork, cavity insulation, plastering, skirting and decoration if needed.



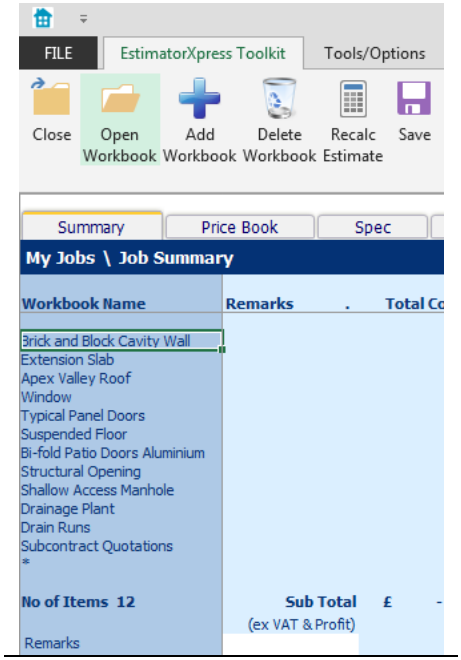
The **Job Summary** screen is the "control centre" or "hub" of your Estimate.

Notice that **EstimatorXpress®** has copied the Extension Demonstration **Workbooks** into the **Job Summary** screen.

At this stage, no costs are indicated for each **Workbook**, as you have not carried out any estimating for the extension.

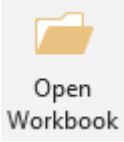
For further Help about this screen press the help button or press the function key F1.

NOTE: If any of the descriptions are not fully visible in any cell or you see ##### anywhere on screen, right-click on the ##### and then click on **Autofit**. This will automatically fit any text into the cell.

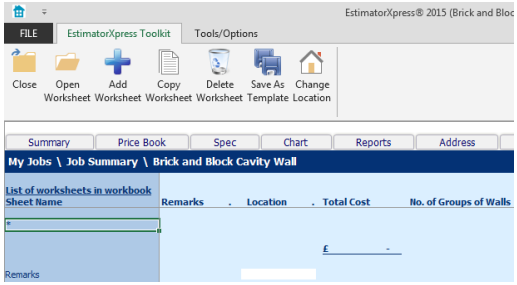


[1] To start estimating, select a **Workbook** from the left-hand side of the screen with the cursor.

[2] Click on **Brick & Block Cavity Wall**.



[3] Press the **Open Workbook** button.



EstimatorXpress® transfers you to the **Summary of Brick & Block Cavity Wall Workbook.**

The **Summary of Brick & Block Cavity Wall** is used to list different **Worksheets** that are stored within each **Workbook**.

Each **Worksheet** in this **Workbook** can contain a Cavity Wall with a slightly different **Specification**.

NOTE: In addition to the standard **Brick & Block Cavity Wall, EstimatorXpress®** also contains **Workbooks** for estimating **Stone Facing Cavity Walls**, **Block Cavity Walls** and **Multileaf Brick Cavity Walls** amongst others, plus you can copy any of these **Workbooks,** substitute your own **Specification** and choice of **Materials** to create your own personalised **Workbooks.**

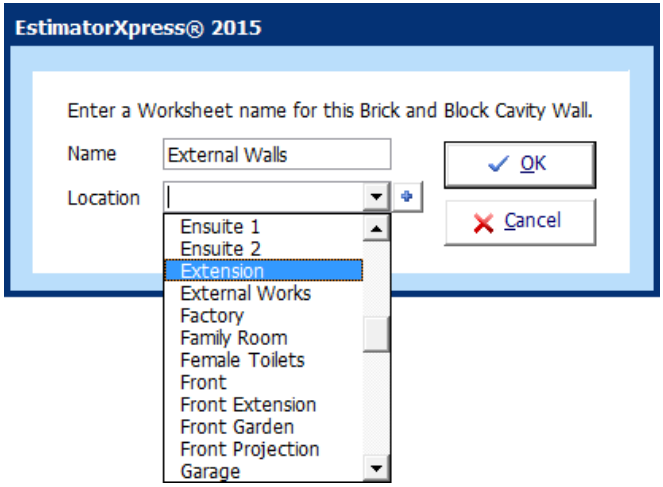
TIP: If you wanted to add any additional **Worksheets** to the **Brick & Block Cavity Walls Workbook**, you can simply click the **Add Worksheet** button located on the Toolbar and the dialog box asking for a Name and Location for your new **Worksheet** will appear again.

[4] If this is the first time you have opened the **Brick & Block Cavity Wall Workbook**, a dialog box will automatically pop up, asking you to create a **Worksheet**. You will be prompted to type in a name for the **Worksheet.** Type **External Walls** into the top white cell. Do not enter full stops, apostrophes, commas or other symbols.

You must then select a location using the drop down box. Scroll down using the pull down arrow until you find **Extension**. Select **Extension**.

Click **OK** when finished.

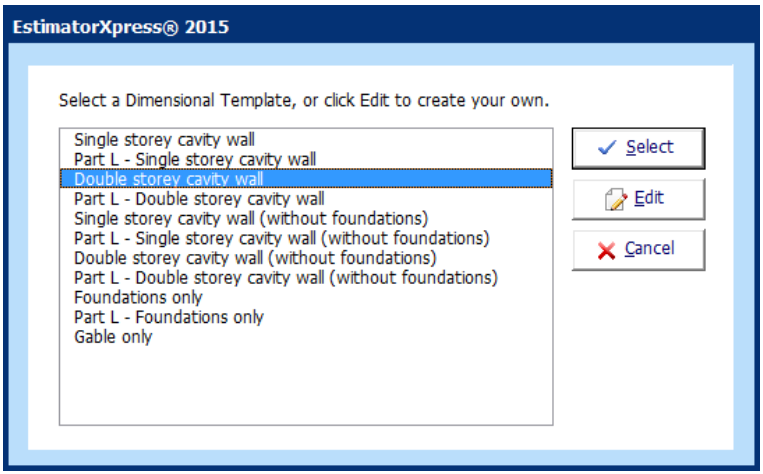
NOTE: You must complete **both** boxes on the dialog box before clicking **OK**.

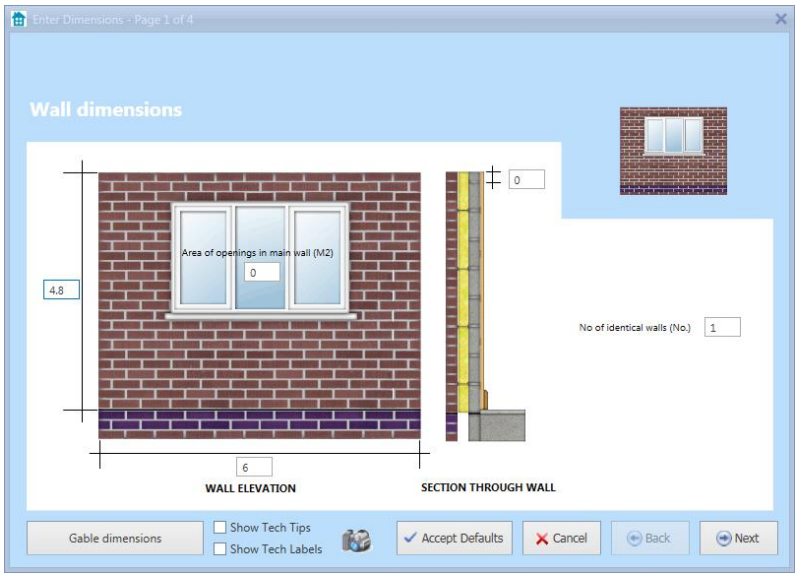


EstimatorXpress® then transfers you into the **Dimensions section** of the **External Walls Worksheet** and another dialog box will pop up, asking you to select a wall template. In order to help you begin estimating the **Brick & Block Cavity Walls**, **EstimatorXpress®** already contains several template wall types containing example dimensions including **Single storey cavity wall, Double storey cavity wall, Foundations only** and **Gable only**.

NOTE: When you are estimating your own **Jobs** in the future, it doesn't matter if the template you choose does not match the requirements of your **Job** exactly as you can modify the template once you have selected it.

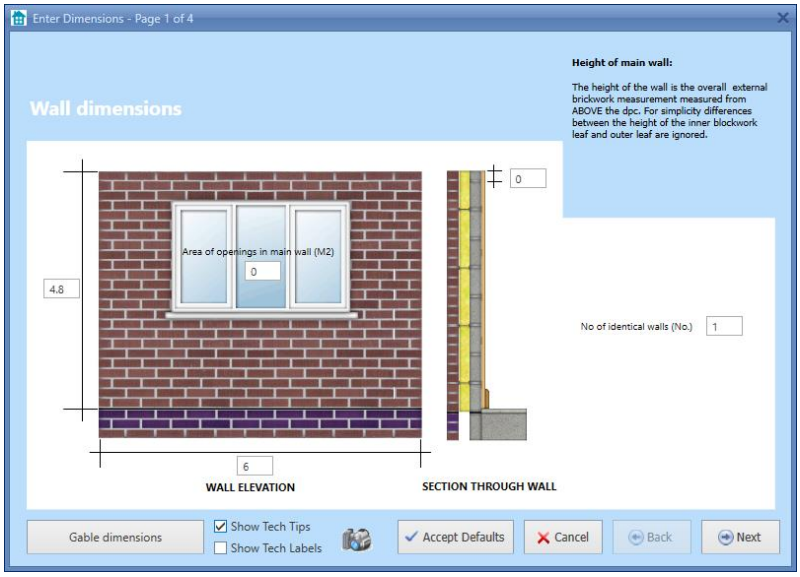
[5] For this two storey extension, select **Double storey cavity wall** and click **Select.**





The **Double storey cavity wall** template has now been transferred to your estimate for you to start entering dimensions and the **Dimensions Wizard** dialog box has popped up. The **Dimensions Wizard** contains drawings to assist you in entering and confirming dimensions.

TIP: **EstimatorXpress®** won't let you estimate any unrealistic or inappropriate figures. When you have entered dimensions into the **Dimensions Wizard** screens, **EstimatorXpress®** checks the information you have entered using its built in **Data Checker**. If it detects that any abnormally large or small data, or data of the wrong type (e.g. a letter in a numerical cell) has been entered, a dialog box will pop up asking you to re-check the information you entered.



[6] Dimensions are entered into the system using a series of drawings for each **Workbook** so that you can see which measurement you should be typing in. Once you are happy with a dimension, press **Enter** on your keyboard or use the tab key to move to the next one. The software is programmed to move from cell to cell when you press **Enter**.

TIP: To see explanations of the dimensions, click on the **Show Tech Tip** check box on the bottom of the dialog box and a hint will appear on the top right hand corner of the screen.

TO ESTIMATE WALL 1 & 2:

If you examine the extension plan on page 25, you will see there are 3 walls, 2 identical walls and 1 with a gable and window to each floor:

Wall No.	Length (m)	Door & Window Area (m^2)
1	2.5	0
2	2.5	0
3	4	=1.8*1.2*2 = 4.32

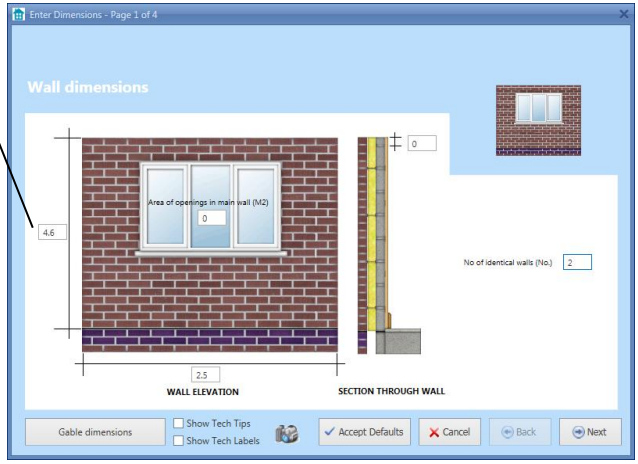
[7] Let's start with the 2 identical walls. In the cell showing the **Height of Wall**, enter 4.6. (Do not type in m for metres!). Press **Enter** to move to the next cell.

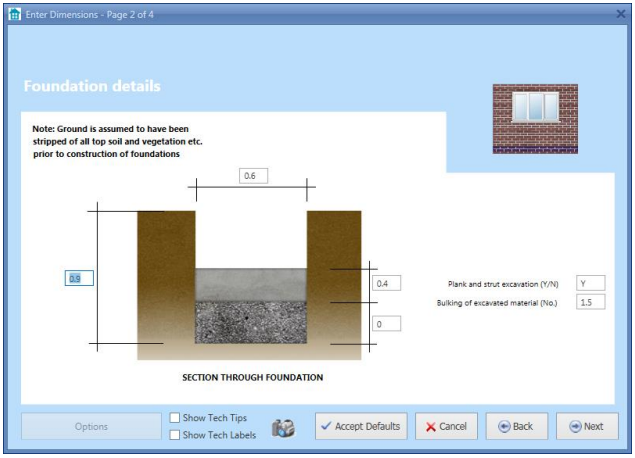
[8] Now enter the **Wall Length** of 2.5 and press **Enter** on your keyboard.

[9] Enter **0** for **Area of openings in main wall** and press **Enter** on your keyboard.

[10] Confirm that **Height of Coursing Blocks above DPC** is 0.

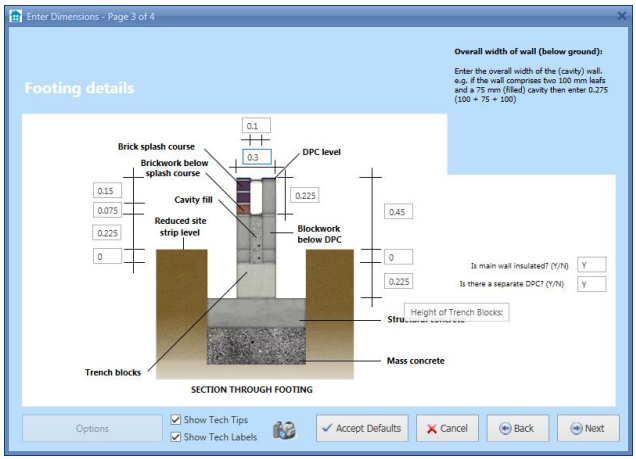
[11] The next cell is called **No. of Identical Walls.** As there are 2 identical walls in this extension, enter 2 and then click **Next.**





[12] **EstimatorXpress®** is now asking you for details of the **Foundation.** Confirm or make any changes to the **Foundation Depth, Structural Concrete Thickness, Mass Concrete (if any), Foundation Width**, whether you want to allow for **Planking and Strutting** and the **Bulking Factor** for spoil using your own usual methods, pressing **Enter** to move from one cell to the next.

[13] Click **Next** when you want to move on to the next screen.

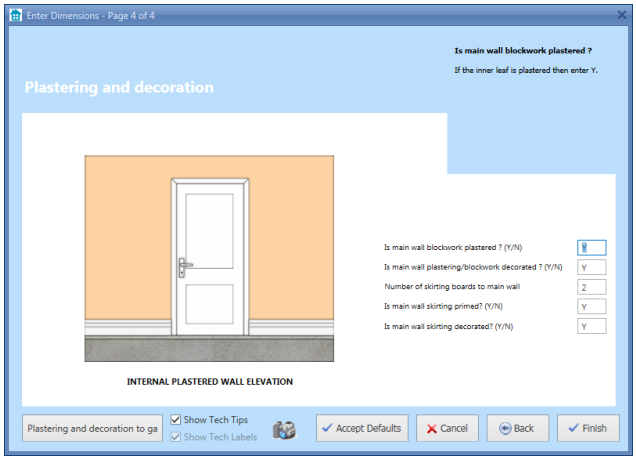


[14] Now confirm or make any changes you think are necessary to the **Footing Details**.

If you are unsure what dimension the software requires, turn on the **Tech Tips** by clicking on **Show Tech Tips** checkbox. Extra help will appear in the top right hand corner of the dialog box.

Click **Next** when you are satisfied with the footing details.

TIP: Clicking **Show Tech Labels** check box underneath the graphic will switch on useful extra labels on the drawings.

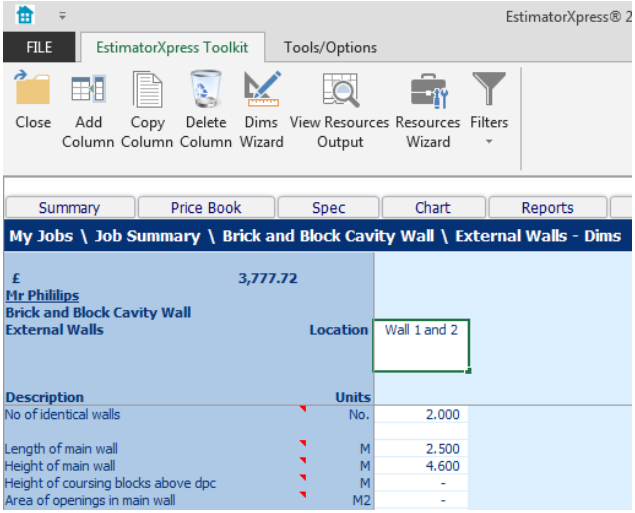


[15] Finally confirm the **Finishes** for the **Brick & Block Cavity Walls**. On this screen you can decide if you want to include plastering, decorating and skirting boards in your estimate. To exclude any of these items, simply change the Y to an N.

[16] Click **Finish** when you have checked these details.

EstimatorXpress® has now closed the **Dimensions Wizard** and returned you the **Brick & Block Cavity Wall External Walls Worksheet** that you have created. The white column now contains all the dimensions you have just entered for the 2 identical walls.

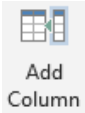
NOTE: To add or modify the dimensions on any **Worksheet** that already contains a white column of dimensional data, press the **Dims Wizard** button at any time. The dialog box containing drawings will then pop up again.



[17] Label this column of information by double-clicking on the white cell where it says **Double storey cavity wall** deleting the existing text and typing **Wall 1 and 2.**

TO ESTIMATE WALL 3:

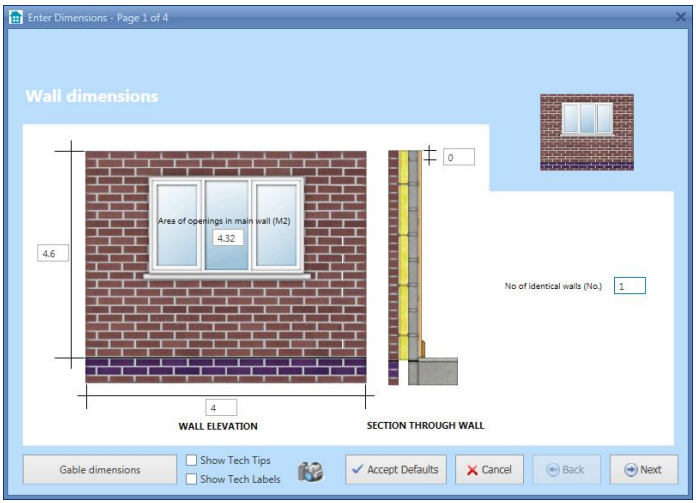
If you examine the elevation on page 27 you will see there is a front gable.



[18] To create this wall including its gable, press the **Add Column** button.

[19] Click on **Double storey cavity wall** again and then press **Select.**

The **Dims Wizard** opens automatically again.



[20] Enter **Wall Height** of 4.6 as before and press **Enter** to move to **Wall Length.**

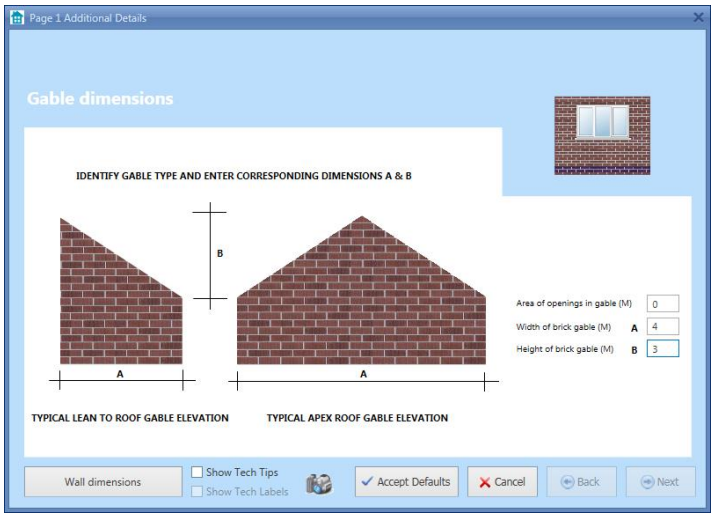
[21] Type in **Wall Length** 4.0 in the cell labelled **Wall Length**. Press **Enter**.

[22] The extension will have a 1.8m x 1.2m window to each storey of the front elevation. To work out the wall area that will be omitted, in the cell labelled **Area of openings in main wall** calculate the area (i.e. =1.8 x 1.2 x 2) and enter 4.32 then press **Enter** key.

[23] Leave the **Height of coursing blocks above dpc** as 0.

[24] Leave the **No. of Identical Walls** as 1.

NOTE: By inputting the door and window area, **EstimatorXpress®** is simply calculating the wall area to be omitted. This will then deduct the bricks, blocks, plastering etc from the overall wall…the actual windows and reveals will be added later!



[25] Now click on the **Gable Details** button located in the bottom left of the **Dimensions Wizard** box.

[26] The **Gable Details** screen is displayed.

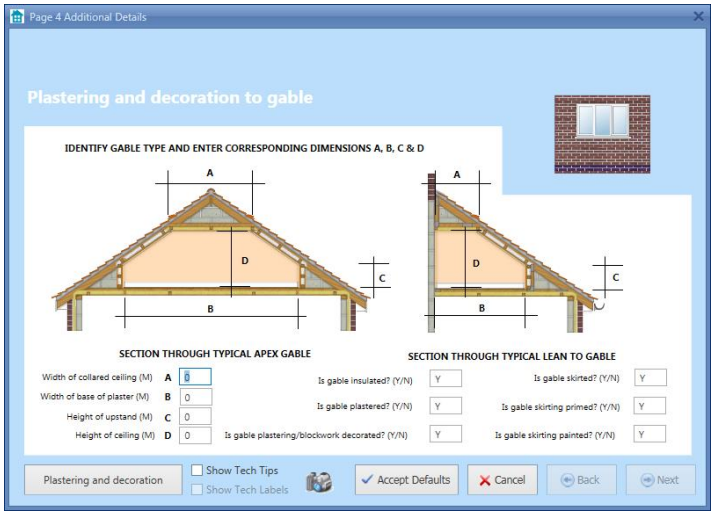
[27] Enter **Width of Brick Gable** of 4.00.

[28] Enter **Height of Brick Gable** of 3.00.

[29] Click **Return** when you have finished on this screen.

[30] Click **Next** to review the **Foundation** and **Footing** details as before.

[31] Continue estimating the rest of **Wall 3** by confirming and modifying where necessary the rest of the dimensions shown in the dialog boxes. Press the **Enter** key to move from one cell to the next cell and use the **Next** and **Back** buttons to move between the screens.



[32] When you reach page 4, click **Plastering and Decoration to Gable** button on the bottom left of the **Dimensions Wizard**.

[33] Carefully check the **Dimensions** and other information relating to **Plastering and Decoration to Gable** and then click **Return** to go back to page 4 of the **Dimensions Wizard.**

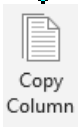
[34] Click **Finish.**

£ 6,868.29			
Mr Phililips			
Brick and Block Cavity Wall			
External Walls	Location	Wall 3	Wall 1 and 2
Description	Units		
No of identical walls	No.	1.000	2.000
Length of main wall	M	4.000	2.500
Height of main wall	M	4.600	4.600
Height of coursing blocks above dpc	M	-	-
Area of openings in main wall	M2	4.320	-
Foundation depth below site strip	M	0.900	0.900
Structural concrete thickness	M	0.400	0.400
Mass concrete thickness	M	-	-
Height of Trench Blocks	M	0.225	0.225
Foundation width	M	0.600	0.600
Splash course depth	M	0.150	0.150
Brickwork depth below splash course	M	0.075	0.075
Cavity fill depth below top of dpc	M	0.225	0.225
Height of blockwork to inner leaf below dpc	M	0.450	0.450
Height of blockwork to outer leaf below dpc	M	0.225	0.225
Height of coursing blocks to inner leaf below dpc	M	-	-
Height of coursing blocks to outer leaf below dpc	M	-	-
Plank and strut excavation	Y/N	Y	Y
Bulking of excavated material	No.	1.500	1.500
Overall width of wall (below ground)	M	0.300	0.300
Cavity Width (below ground)	M	0.100	0.100
Is main wall blockwork plastered ?	Y/N	Y	Y
Is main wall plastering/blockwork decorated ?	Y/N	Y	Y
Number of skirting boards to main wall		2.000	2.000
Is main wall skirting primed?	Y/N	Y	Y
Is main wall skirting decorated?	Y/N	Y	Y
Is there a separate DPC?	Y/N	Y	Y
Is main wall insulated?	Y/N	Y	Y
Height of brick gable	M	3.000	-
Width of brick gable	M	4.000	-

When finished you will be returned to the **Brick & Block Cavity Wall External Walls Worksheet Dimensions** screen with 2 columns of data as shown opposite.

[35] Click on the top white cell of the new column and type in **Wall 3** to label this column of information.

NOTE: If you wanted to estimate a **Gable** separately from the rectangular part of the **Wall,** you can use the **Gable Only** template, which only deals with the triangular section of the wall.



TIP: If you wanted to add **Walls** that were very similar, you could click with your mouse anywhere on a column you have already estimated and press the **Copy Column** button, which creates an identical copy for you to check and/or modify using the **Dimensions Wizard.**

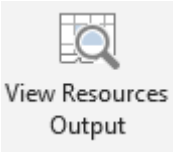
You have now entered all the information required to estimate all of the cavity walls. At the top of the screen, you will see an estimated price for the build of the 3 walls including the gable.

So, what do you get for your money? The next exercise will show you how to look at your estimate output.

VIEWING THE OUTPUT FOR THE BRICK & BLOCK CAVITY WALLS

5.00 Minutes

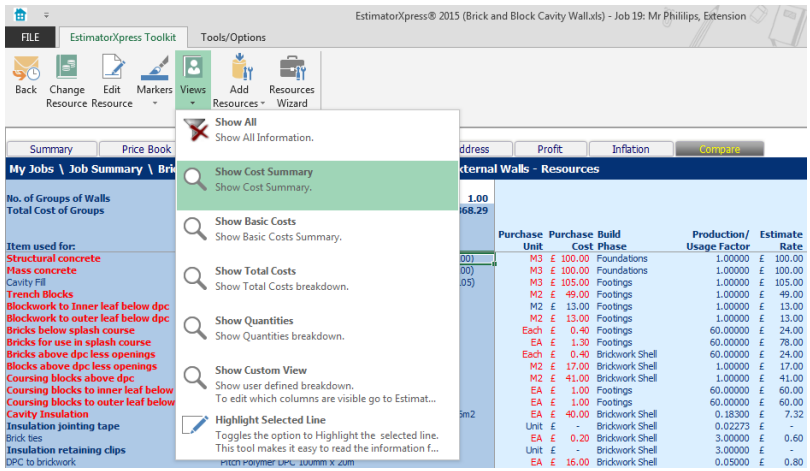
In this section of the tutorial, you will look at the output that **EstimatorXpress®** produces. **EstimatorXpress®** has produced a schedule of **Materials**, **Labour** and **Plant** required to build the cavity walls and gables, including costs and an allowance for wastage.

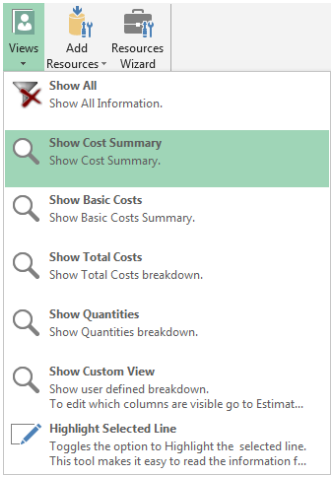


[1] From the **Brick & Block Cavity Wall Dimensions** screen, press the **View Resources Output** button.

[2] You are transferred to the **Brick & Block Cavity Wall Resources Output** screen. You will see that **EstimatorXpress®** has calculated the order quantities and costs associated with all the **Material**, **Labour** and **Plant**, including an allowance for wastage for all of the **Brick & Block Cavity Walls**. Scroll across the screen with the horizontal scroll bar to see all of the data.

[3] Now use the **Views** drop-down menu to look at the output. Choose from **Show Cost Summary, Show Basic Costs, Show Total Costs, Show Quantities** and **Show All.**





If you press **Show Cost Summary** button from the **Views** drop-down menu, you will see a summary of Costs, Wastage Costs and Total Cost inc. Wastage for each **Resource.**

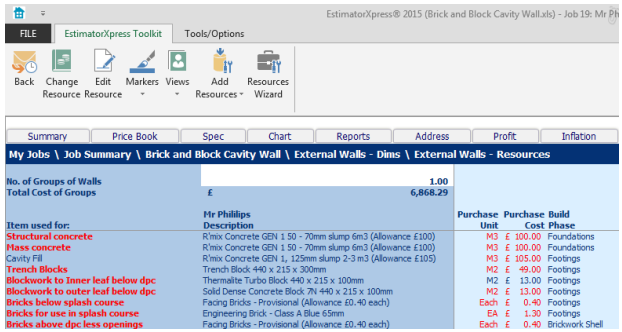
If you press **Show Basic Costs** button from the **Views** drop-down menu, you will see basic cost information including purchase unit, cost per purchase unit and no. of units required.

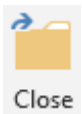
If you press **Show Total Costs** button from the **Views** drop-down menu, you will see extended cost information including estimated units required, total quantities including wastage allowance, and total cost of each resources.

If you press **Show Quantities** button from the **Views** drop-down menu, this shows total quantities of materials required including wastage.

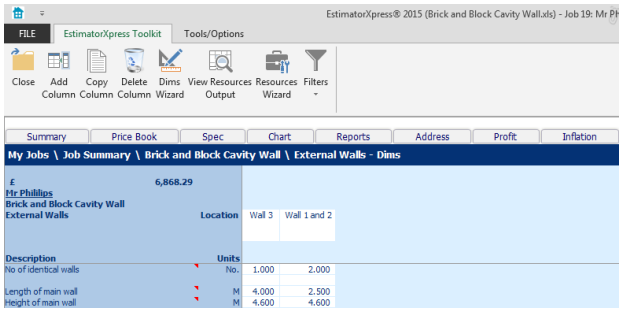
If you press **Show All,** this shows you all the **Resources Output** for the estimate relating to **Brick & Block Cavity Walls.**

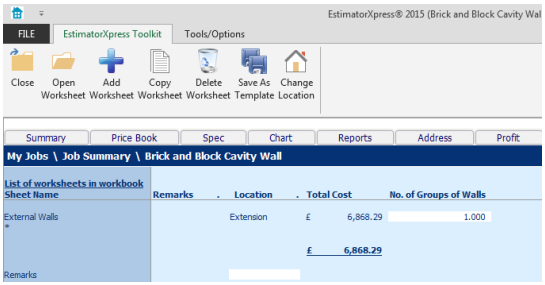
[4] Assuming you are satisfied with the estimate output for your external walls, return to the **Brick & Block Cavity Walls Worksheet Dimensions** screen using the **Back** button.





[5] Then press the **Close** button to return to **Summary of Brick & Block Cavity Walls Workbook**.

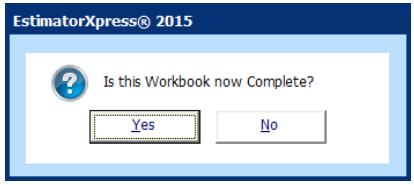




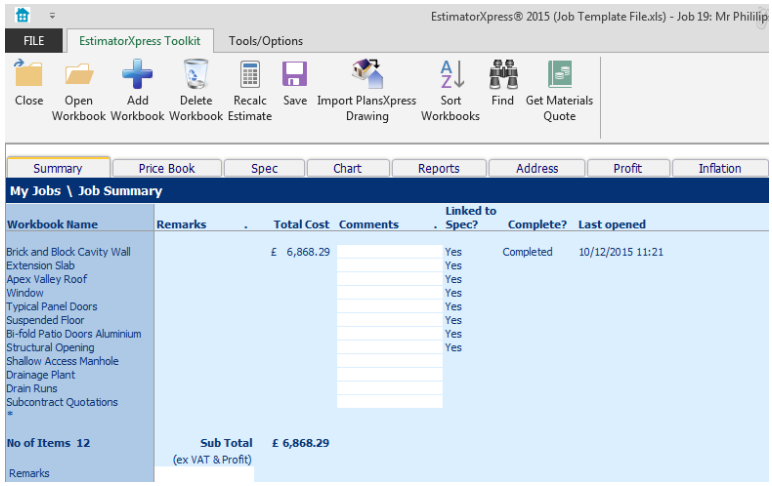
[6] You will now see a final cost for the **External Brick & Block Cavity Walls.**

[7] Now, to return back to **Job Summary**, again press the **Close** button. This will automatically save your **Brick & Block Cavity Walls Workbook**.

[8] A dialog box pops up asking if this item (Cavity Walls) is now complete. Click **Yes**. *(This marks the **Brick & Block Cavity Walls** "Complete" in the **Job** Summary Screen)*

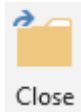


You will now see a final estimate costing for your cavity walls as part of your overall estimate in the **Job Summary** screen.

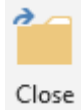


If you wish to stop and close this current Estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You will be transferred to the **My Jobs** screen. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of the screen.

EXTENSION SLAB

7.5 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

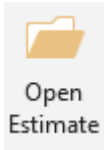
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

2. This will transfer you to the **My Jobs**. Click on the **Job** called Mr Phillips or whatever you called the **Job** when you created it.

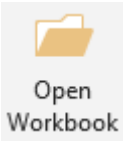
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



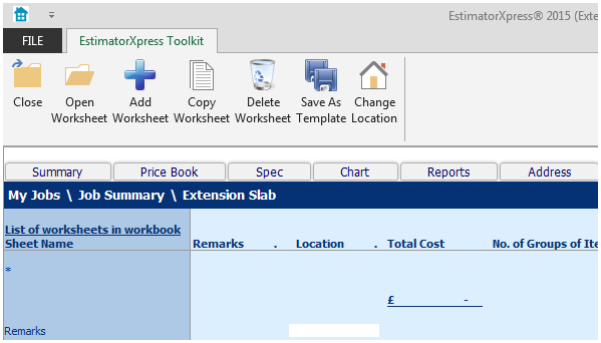
This tutorial leads you through the estimating of the **Extension Slab**.

The **Extension Slab** is an example of a **Non-Specification Linked Workbook** to which you add any **Sundry items** that you require. (See page 20 for an explanation of this.) The **Extension Slab Workbook** calculates all Materials and Labour required to construct the slab but you must specify the Plant you require as a **Sundry** item because the Plant is assumed to be independent of the area of slab required.

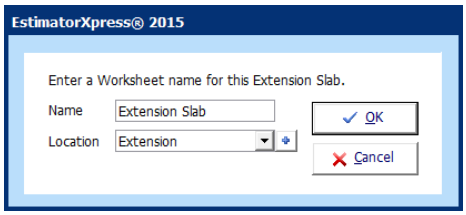
[1] To start estimating your **Extension Slab** in the **Job Summary** screen, select **Extension Slab**.



Press the **Open Workbook** button.

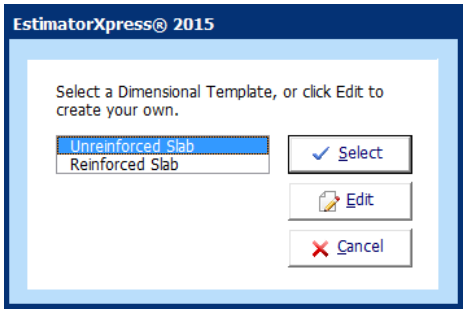


[2] You are now transferred to **Summary of Extension Slab Workbook** and a dialog box will automatically pop up asking you to give a name and location for the slab.



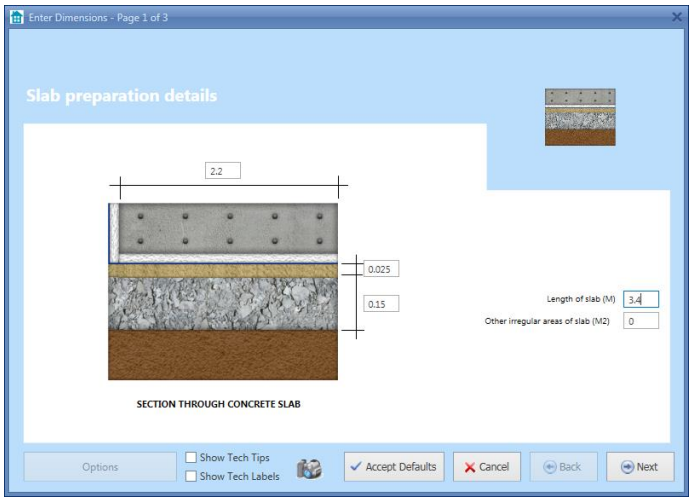
[3] Enter **Extension Slab** or any name you think is sensible and then select **Extension** for location. Click **OK.**

[4] **EstimatorXpress®** transfers you to the **Extension Slab Worksheet Dimensions** screen.



[5] Another dialog box will automatically pop up asking you to select a template. Choose the **Unreinforced Slab** template**.**

Click **Select.** These templates have already been set up for you to speed up the estimating process. By simply changing the area of slab required, a new cost will automatically be calculated.



EstimatorXpress® Dimensions Wizard will automatically open up a dialog box containing drawings to assist you in entering and confirming dimensions.

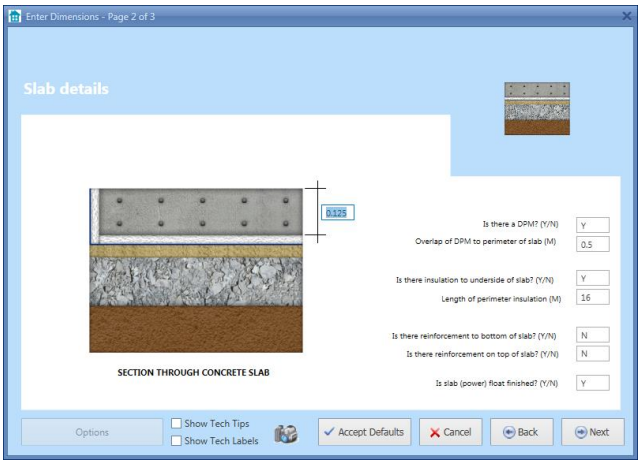
To calculate the area of the **Extension Slab** the extension can be thought of as a rectangle.

	Rectangle 1
Length (m)	3.4
Width (m)	2.2

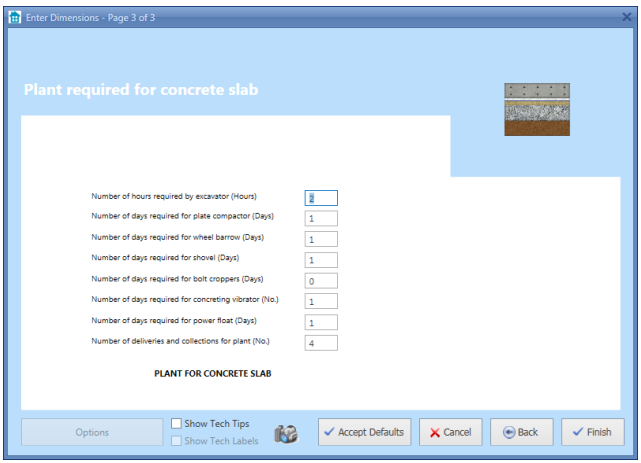
[6] (The above dimensions are the **internal** wall dimensions.) Firstly, input 2.2 into **Width of Slab** and press **Enter**.

[7] Confirm or alter the thickness of sand blinding and sub-base. Just press **Enter** if you are happy with the standard value.

[8] Input 3.4 in the white cell **Length of Slab** and press **Enter.** Click **Next.**

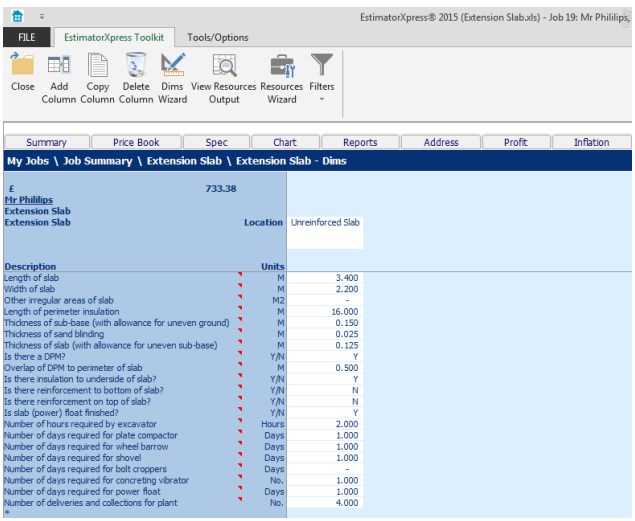


[9] Next confirm the **Thickness of Slab** and details relating to the **Damp Proof Membrane, Insulation, Reinforcement** and **Finishes.** Click **Next.**



[10] On the final page of the **Dimensions Wizard**, you will see a list of the **Plant** items that relate to the construction of the slab. These items are not dependent directly on the area of the slab, for example you may need to allow for certain items of **Plant** to be on site for a certain number of days regardless of the dimensions of the slab.

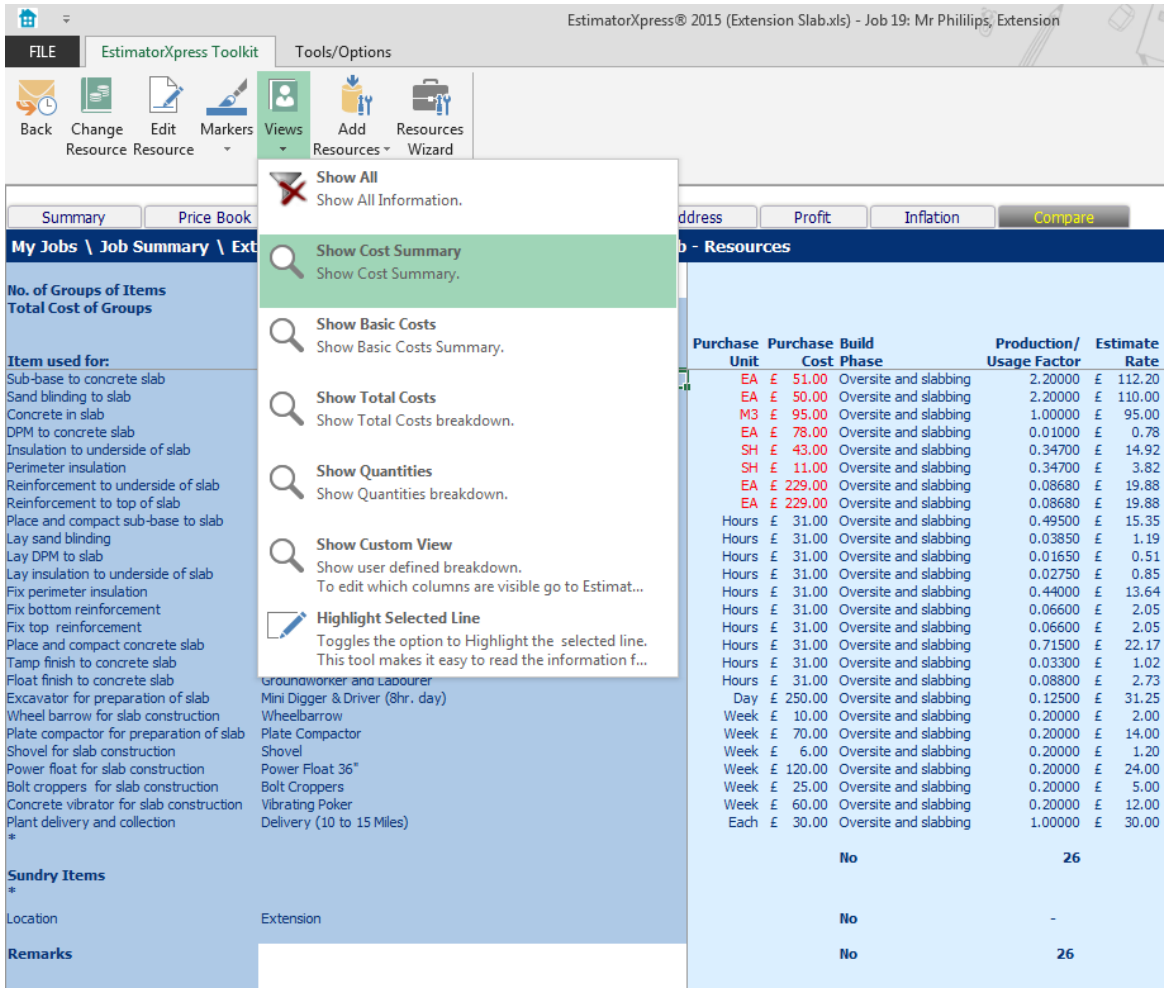
EstimatorXpress® automatically loads these resources as it assumes you will require them to build the **Extension Slab**. You may wish to work on a different basis depending on the scale of the building work you are undertaking and of course, you can modify or change these items before clicking **Finish**.



[11] **EstimatorXpress®** then transfers you back into the **Extension Slab Worksheet Dimensions** screen showing the dimensions you have just entered in the white column.

[12] To see the full output of your **Slab Workbook,** click the **View Resources Output** button.

[13] **EstimatorXpress®** transfers you to the **Extension Slab Worksheet Resources Output** screen. This screen displays all the Materials, Labour and Plant required just for the Extension Slab.



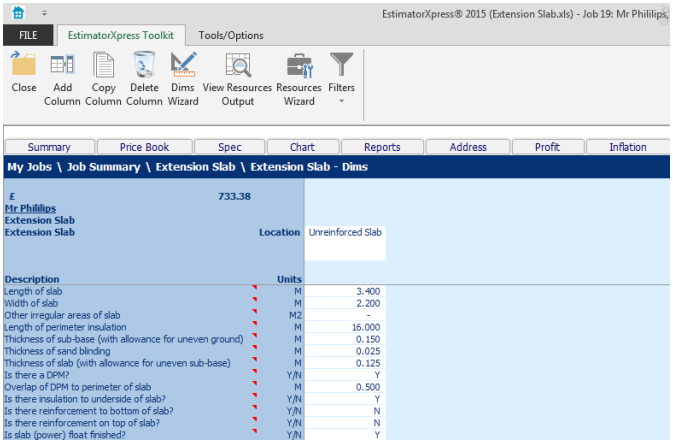
Towards the top of the screen, you will see the resources, which relate to the dimensions of the slab such as concrete, sand and labour. These items are automatically adjusted by **EstimatorXpress®** to match the area of the slab, which have been entered in the dimensions screen.

Further down the screen, you will see the Plant items that you entered in step [10]. You will recall from the **Dimensions Wizard** that they do not relate ***directly*** to the area of the extension but you manually specified the length of time required for each item.

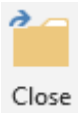
Let's assume that the resources are **OK** for the purpose of this **Job**.

If you do wish to replace any of the materials for example please refer to the Help by pressing the Help button or by pressing the F1 function key.

[14] To view the output of the **Extension Slab Workbook**, use the 6 options inside the **Views** drop-down menu.



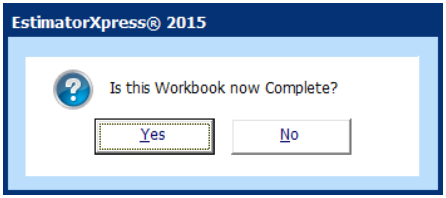
[15] Assuming you are satisfied with the estimate output for the **Extension Slab**, close the **Extension Slab Workbook** by pressing **Back** to return to the **Extension Slab Worksheet Dimensions** screen.



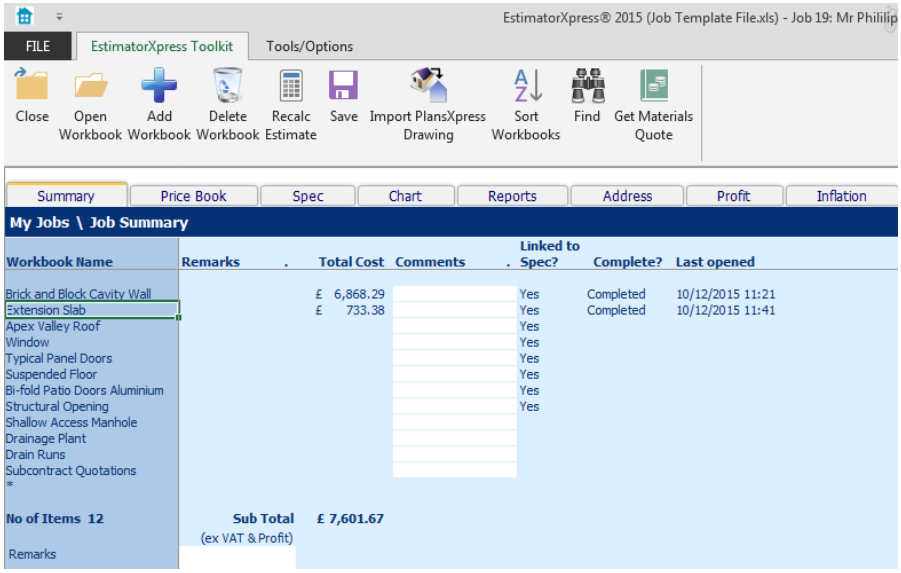
[16] Press the **Close** button to return to the **Summary of Extension Slab Workbook.**

You will now see a final cost for the **Extension Slab** on screen.

[17] Now to return back to **Job Summary** screen, press the **Close** button. This will automatically save your **Extension Slab Workbook**.



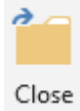
[18] A dialog box pops up asking if the item is now complete. Click **Yes**.



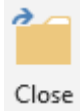
You will now see a final estimate costing for your **Extension Slab** as part of the overall estimate cost on screen.

If you wish to stop and close the current Estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button at the top right of screen.

SUSPENDED FLOOR

7.5 Minutes

If you are starting this tutorial immediately after the previous section, you are already in the right place to continue with this tutorial.

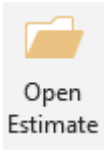
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below.

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

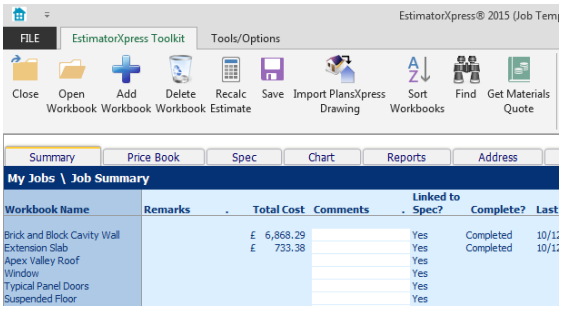
2. This will transfer you to the **My Jobs** screen. Click on the **Job** called Mr Phillips or whatever you called the **Job** when you created it.

3. Press the **Open Estimate** button. You are now ready to start the next tutorial.

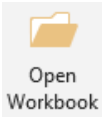


This tutorial leads you through the estimating of a **Suspended Floor.**

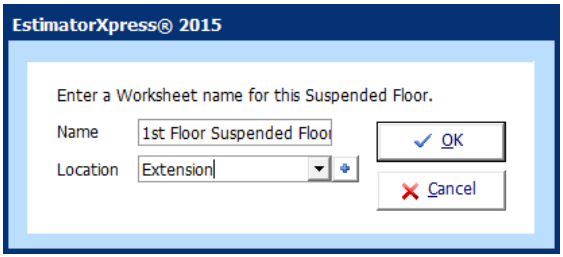
The **Suspended Floor Workbook** is an example of a **Workbook** that is linked to the **Specification** (see page 18 for an explanation of this). To estimate the floor for the 2nd storey of the Extension, simply enter your dimensions into the appropriate cells and **EstimatorXpress®** will schedule all the Materials, Labour and Plant required and then cost it for you. The **Suspended Floor Workbook** will schedule the floor joists, floor surface, insulation, plastering and decorating.



[1] To start estimating the **Suspended Floor ,** select **Suspended Floor** from the left-hand side of the **Job Summary** screen with your mouse.

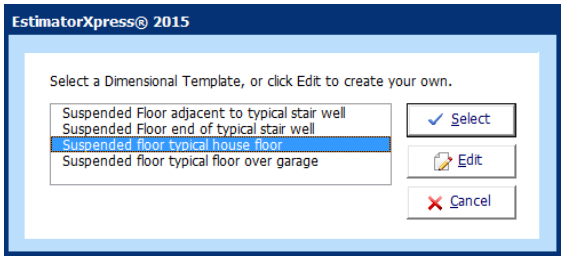


[2] Press the **Open Workbook** button.



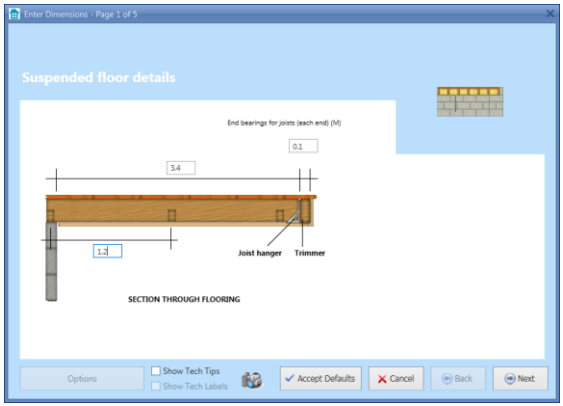
You are then transferred to **Summary of Suspended Floor Workbook** and a dialog box will automatically pop up asking you to label and give a location for the **Suspended Floor**.

[3] Enter **1st Floor Suspended Floor** or any name you think is sensible and then select **Extension** for location. Click **OK.**



EstimatorXpress® then transfers you into the **Dimensions Section** of the **Suspended Floor Worksheet**.

[4] Another dialog box will pop up asking you to select a template. Choose from **Suspended Floor Adjacent to Typical Stair Well**, **Suspended Floor End of Typical Stair Well**, **Suspended Floor Typical House Floor** or **Suspended Floor Typical Floor Over Garage.** Choose the **Suspended Floor Typical House Floor** and click **Select.**`



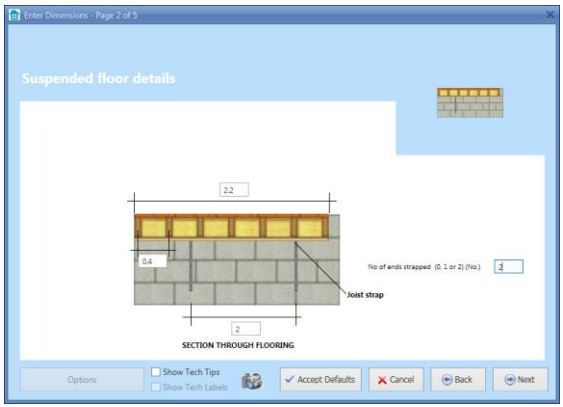
The **Dimensions Wizard** will automatically open up a dialog box containing drawings to assist you in entering and confirming dimensions for the **Suspended Floor.**

EstimatorXpress® has pre-loaded a standard **Suspended Floor** template to speed up the estimating process. You must alter the dimensions to suit the **Job** you are estimating.

[5] Enter the **Span of the Joists** as 3.4 and press **Enter.**

[6] Work your way around the screen confirming the dimensions as you go. As there are no trimmers and hangers, they will be set to zero values. Both ends will be strapped and **Spacing between Floor Bracing** should be set at 1.2

[7] Enter **Joist End Bearings** of 0.1. Click **Next.**

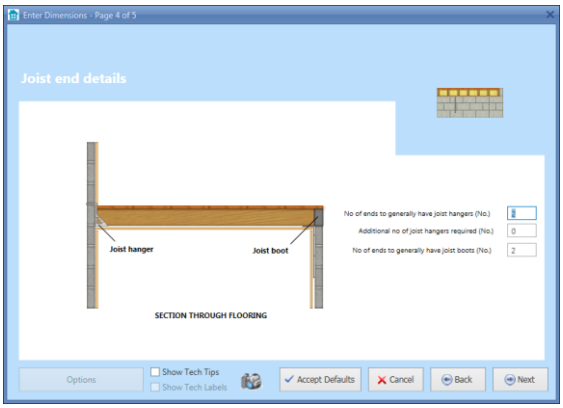


[8] Now enter or confirm the following dimensions:

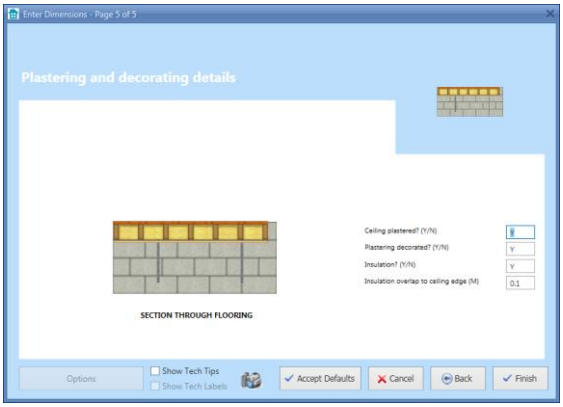
Joist Centres	0.4
Width of Floor	2.2
Joist Strap Centres	2

[9] Click **Next.**

[10] Check and enter **Dimensions** in the **Trimmer Details** and **Joist End Details** screens as required, pressing **Enter** to move between cells as before and clicking **Next** to move to the next screen.



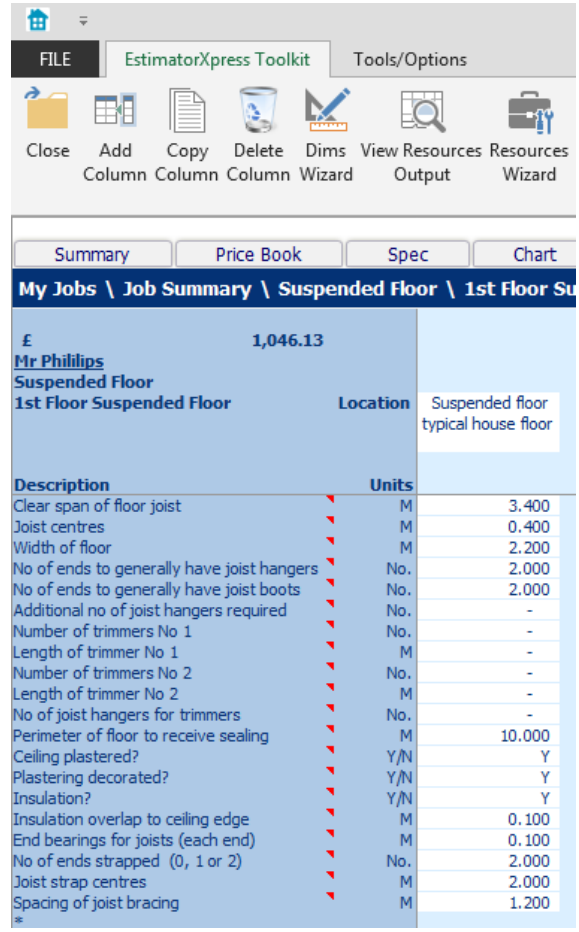
[11] Check the Joist end details and click **Next** to move on to the next screen.

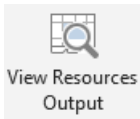


[12] Finally confirm that you require the **Ceiling Plastered** and **Decorated** and that the ceiling should be **Insulated** with an **Overlap** of 0.1

[13] Click **Finish.**

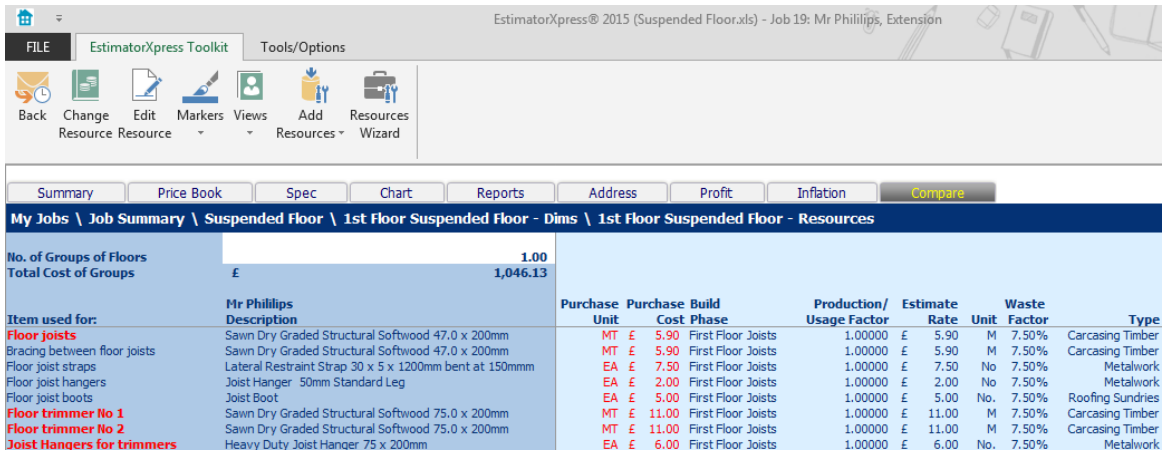
EstimatorXpress® then transfers you back into the **Suspended Floor Worksheet Dimensions** screen showing the dimensions you have just confirmed in the white column.





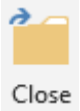
[14] To see the full output of your **Suspended Floor Worksheet**, press the **View Resources Output** button.

EstimatorXpress® transfers you to the **Suspended Floor Worksheet Resources Output** screen. This screen specifies all the **Materials**, **Labour** and **Plant** required for the **Suspended Floor**.



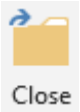
From this screen you can click on **Resources Wizard** should you wish to review and edit any of the materials, labour and plant associated with the **Suspended Floor.**

[19] Assuming for now, you are satisfied with the estimate output for the **Suspended Floor,** close the **Suspended Floor Workbook** by pressing the **Back** button to return to the **Suspended Floor Worksheet Dimensions** screen.



[20] Press the **Close** button to return to the **Summary of Suspended Floor Workbook**.

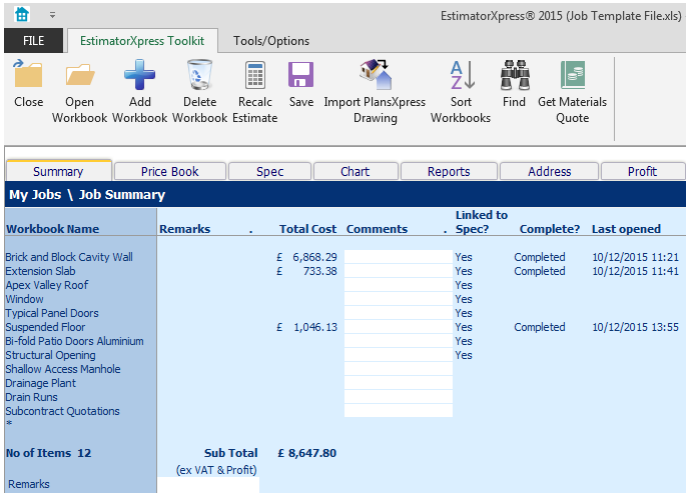
Note the summary price for your **Suspended Floor** has been updated.



[21] To return back to **Job Summary**, press the **Close Workbook** button. This will automatically save your **Suspended Floor Workbook.**

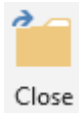
[22] A dialog box pops up asking if this item is now complete. Click **Yes**.

You will now see a final estimate cost for your **Suspended Floor** on the **Job Summary** screen.

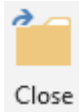


If you wish to stop and close this current Estimate:

1. Press **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press **Exit** button in the top right of screen.

APEX VALLEY ROOF

15.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

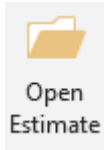
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

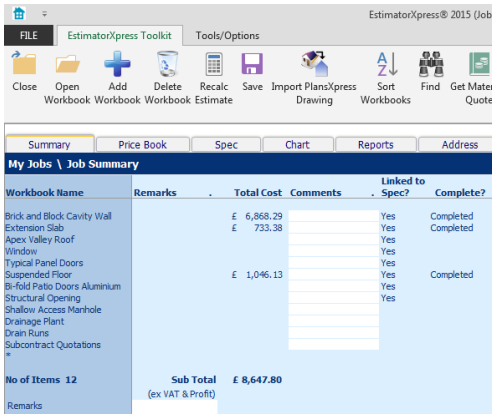
2. This will transfer you to the **My Jobs** screen. Click on the **Job** called Mr Phillips or whatever you called the **Job** when you created it.

3. Press the **Open Estimate** button. You are now ready to start the next tutorial.

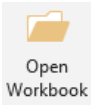


This tutorial leads you through the estimating of an **Apex Valley Roof**. **EstimatorXpress®** also includes **Workbooks** for **Apex Roofs, Lean To Roofs, Flat Roofs** and **Hip Roofs**.

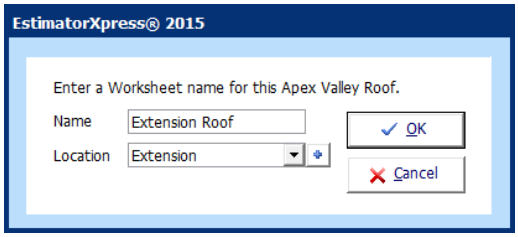
The roof **Workbooks** are **Specification Linked Workbooks** (see page 18 for an explanation of this). To estimate the roof, simply enter your dimensions into the appropriate cells and **EstimatorXpress®** will schedule all the **Materials, Labour** and **Plant** required and then cost it for you. The **Apex Valley Roof Workbook** will schedule the carcassing timber, roof tiling, felt undercloak and lead work, fascias and guttering, decorating, plastering and insulation.



[1] To start estimating the **Apex Valley Roof**, click on **Apex Valley Roof** on the left-hand side of the **Job Summary**.



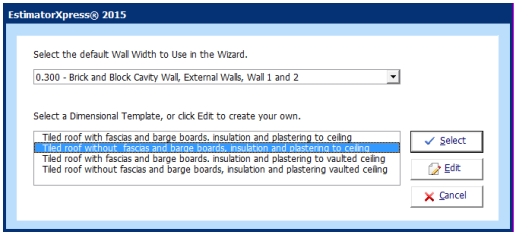
[2] Press the **Open Workbook** button



You are then transferred to **Summary of Apex Valley Roof Workbook** and a dialog box will automatically pop up asking you to give a name and location for the roof.

[3] Enter **Extension Roof** or any name you think is sensible and then select **Extension** for location. Click **OK.**

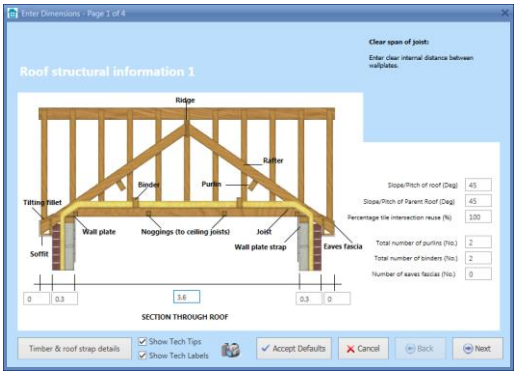
EstimatorXpress® then transfers you into the **Dimensions** screen of the **Apex Valley Roof Worksheet**.



[4] Another dialog box will automatically pop up asking you to select a wall width and template.

Choose the 0.300 Brick and Block Cavity Wall width and the **Tiled Roof without Fascias and Bargeboards with Insulation and Plastering to Ceiling** template**.** These templates have already been set up for you to speed up the estimating process.

[5] Click **Select.**

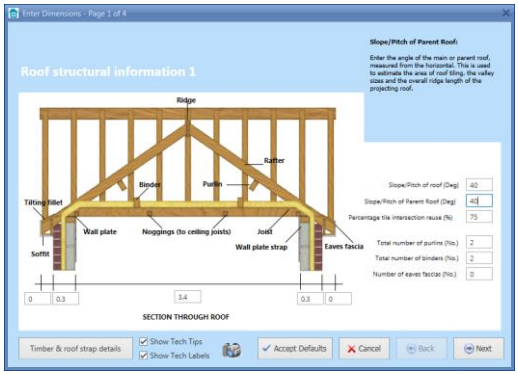


[6] The **Dimensions Wizard** will automatically open up a dialog box containing drawings to assist you in entering and confirming dimensions for the **Apex Valley Roof.**

TIP: Before you enter any dimensions, you may find it useful to switch on **Tech Tips** by ticking the **Show Tech Tips** check box in order to display useful information about each dimension in the top right of the screen, and also to switch on **Tech Labels** by ticking the **Show Tech Labels** check box. You can turn them on and off at any time by ticking and unticking the check boxes.

[7] Now examine the extension plan. You will note the following dimensions:

Clear Span (internal) (m)	3.4
Eaves Length (internal) (m)	2.2
Pitch (Measured from the horizontal)	40º



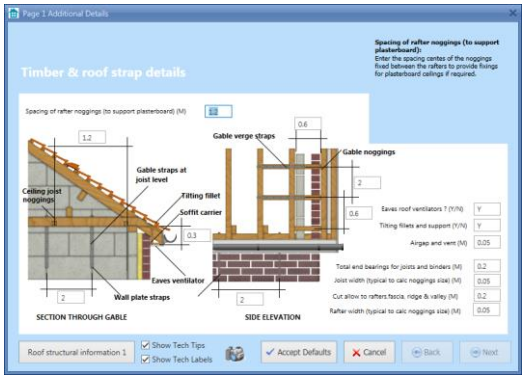
[8] Assuming the **Wall Widths** are correct, press the **Enter** key twice to move the cursor to the **Clear Span of Joists** cell and type 3.4 and press **Enter** (there is no need to type in unit m).

[9] Next, press **Enter** again a couple of times until your cursor is in the cell labelled **Slope/Pitch of Roof.** Enter 40 (no need for unit º) and press **Enter**.

[10] Enter 40 for the **Slope/Pitch of <u>Parent</u> Roof** and press **Enter.**

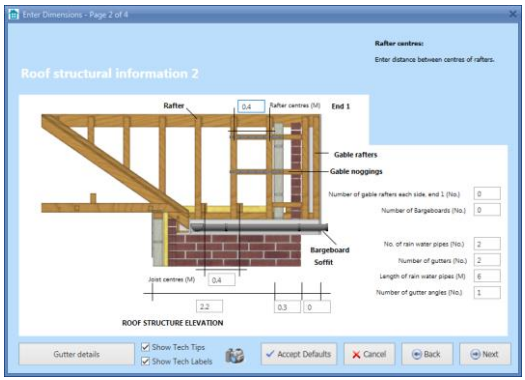
[11] For this extension, you could reuse the tiles from the main roof that you will be removing in order to abut the valley roof, so change the % tile intersection reuse to 75. Press **Enter.**

[12] <u>Before</u> you click **Next,** click on the button in the left hand corner of the dialog called **Timber & Roof Strap Details.**



[13] Most of these items are fairly standard and will not need changing very often. Feel free to change any of them or just leave them as they are and click **Return** to return to the main page.

[14] You will return to **Roof Structural Information 1.** Click **Next** to continue.

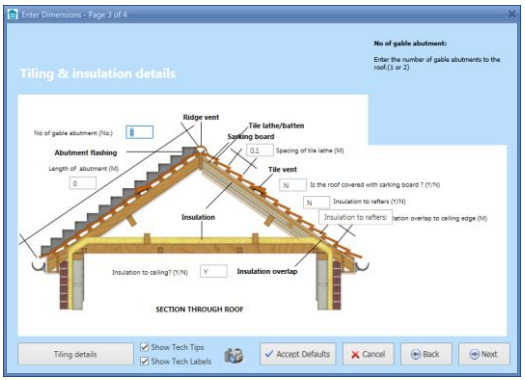


[15] In the cell furthest left at the bottom of the screen (which represents the Eaves length (internal)) type in 2.2 and press **Enter**.

[16] Most of the rest of the items on this page are fairly standard. Press **Enter** to move around the cells making any changes you think are necessary e.g. **No. of Rainwater Pipes.**

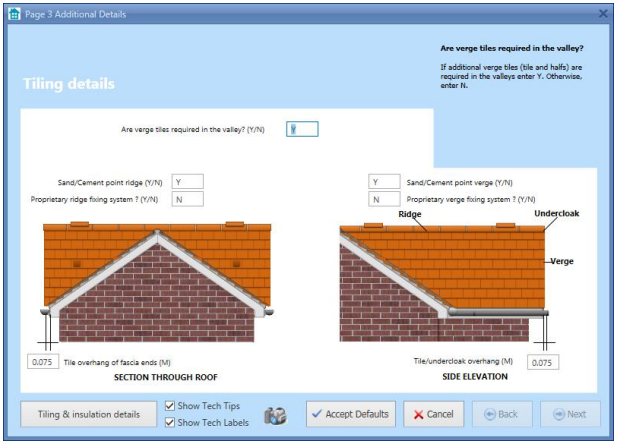
[17] Once you are satisfied with these items, click **Gutter Details** to review the standard specified guttering items**.** Click **Return** to return to the main page.

[18] You will return to **Roof Structural Information 2.** Click **Next** to continue.

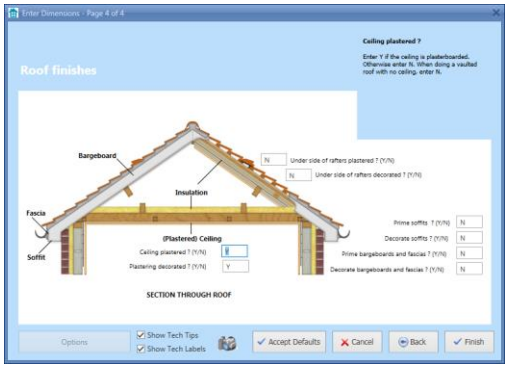


[19] As before, review and modify any of the dimensions relating to tiling and insulation, note that **Length of the Abutment** is zero as the gable end of the roof is not abutting a wall. The lead valley is automatically calculated by **EstimatorXpress®**.

[20] Check the **Tiling Details** by clicking on the **Tiling Details** button on bottom the left hand corner. Click **Return** to return to the main page.



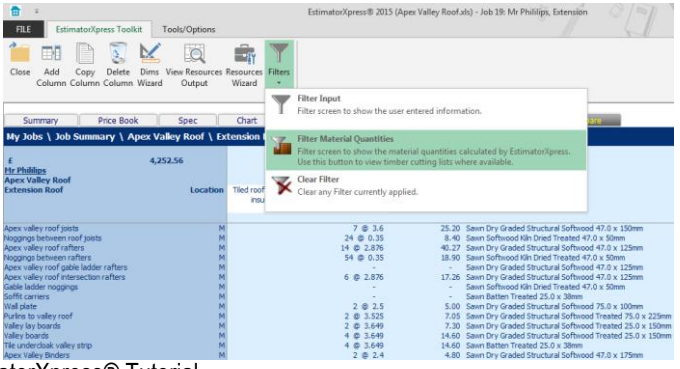
[21] You will return to **Tiling & Insulation Details.** Click **Next** to continue.

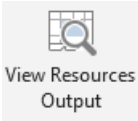


[22] The final stage of this **Apex Valley Roof** is to decide if you want to include plastering and decorating to the ceiling and specify whether you want to allow for decorating the soffits, bargeboards and fascias by entering Y or N.

[23] Once you have confirmed these details, click **Finish** to return to the **Apex Valley Roof Worksheet Dimensions** screen showing all the dimensions you have just entered.

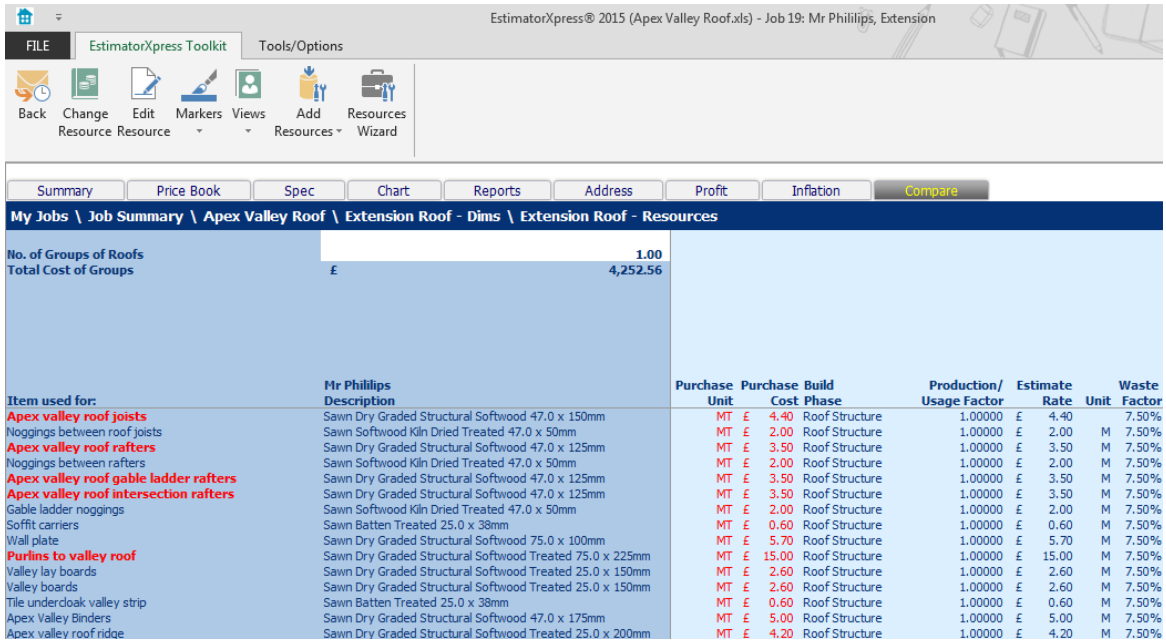
[24] You have now entered all the information required to estimate the **Apex Valley Roof.** To view a full schedule of all timbers required together with details of tiling, guttering, insulation, plastering etc. including a cutting list, click on the **Filters** menu and select **Filter Material Quantities.**





[25] To see the full output of your **Apex Valley Roof Worksheet**, press the **View Resources Output** button.

EstimatorXpress® then transfers you into the **Apex Valley Roof Resources Output screen**. Scroll down and across the screen with the scroll bars to see all the information relating to the **Materials**, **Labour** and **Plant**.

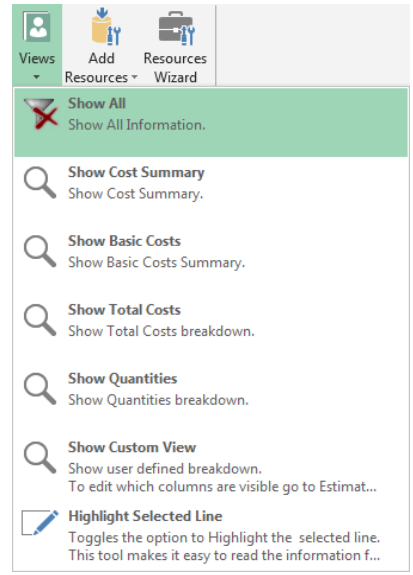


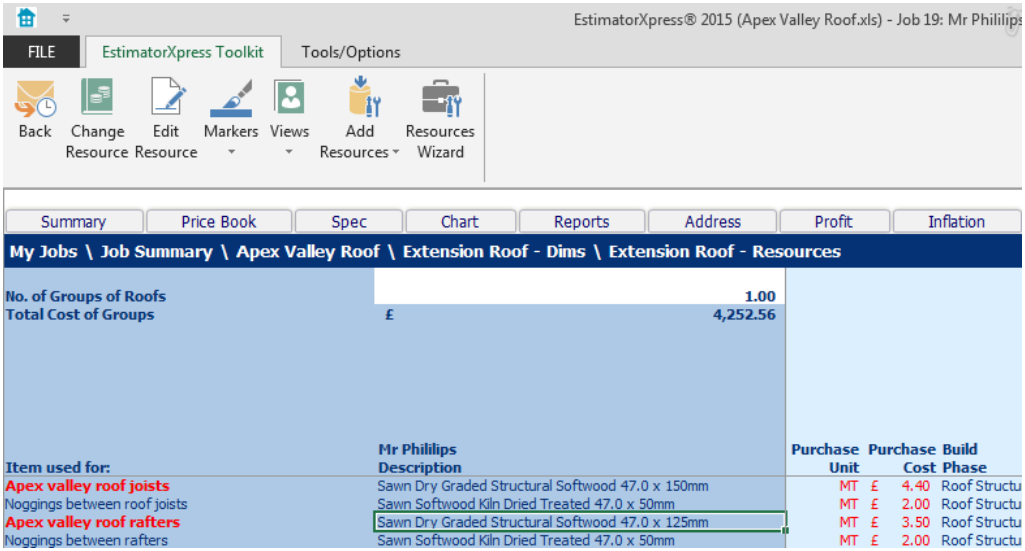
Item used for:	Mr Phililips Description	Purchase Unit	Purchase Cost	Build Phase	Production/ Usage Factor	Estimate Rate	Unit	Waste Factor
Apex valley roof joists	Sawn Dry Graded Structural Softwood 47.0 x 150mm	MT	£ 4.40	Roof Structure	1.00000	£ 4.40		7.50%
Noggings between roof joists	Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT	£ 2.00	Roof Structure	1.00000	£ 2.00	M	7.50%
Apex valley roof rafters	Sawn Dry Graded Structural Softwood 47.0 x 125mm	MT	£ 3.50	Roof Structure	1.00000	£ 3.50	M	7.50%
Noggings between rafters	Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT	£ 2.00	Roof Structure	1.00000	£ 2.00	M	7.50%
Apex valley roof gable ladder rafters	Sawn Dry Graded Structural Softwood 47.0 x 125mm	MT	£ 3.50	Roof Structure	1.00000	£ 3.50	M	7.50%
Apex valley roof intersection rafters	Sawn Dry Graded Structural Softwood 47.0 x 125mm	MT	£ 3.50	Roof Structure	1.00000	£ 3.50	M	7.50%
Gable ladder noggings	Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT	£ 2.00	Roof Structure	1.00000	£ 2.00	M	7.50%
Soffit carriers	Sawn Batten Treated 25.0 x 38mm	MT	£ 0.60	Roof Structure	1.00000	£ 0.60	M	7.50%
Wall plate	Sawn Dry Graded Structural Softwood 75.0 x 100mm	MT	£ 5.70	Roof Structure	1.00000	£ 5.70	M	7.50%
Purlins to valley roof	Sawn Dry Graded Structural Softwood Treated 75.0 x 225mm	MT	£ 15.00	Roof Structure	1.00000	£ 15.00	M	7.50%
Valley lay boards	Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT	£ 2.60	Roof Structure	1.00000	£ 2.60	M	7.50%
Valley boards	Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT	£ 2.60	Roof Structure	1.00000	£ 2.60	M	7.50%
Tile undercloak valley strip	Sawn Batten Treated 25.0 x 38mm	MT	£ 0.60	Roof Structure	1.00000	£ 0.60	M	7.50%
Apex Valley Binders	Sawn Dry Graded Structural Softwood 47.0 x 175mm	MT	£ 5.00	Roof Structure	1.00000	£ 5.00	M	7.50%
Apex valley roof ridge	Sawn Dry Graded Structural Softwood Treated 25.0 x 200mm	MT	£ 4.20	Roof Structure	1.00000	£ 4.20	M	7.50%

[26] Use the six output options from the **Views** drop-down menu to view the output:

- Show All
- Show Cost Summary
- Show Basic Costs
- Show Total Costs
- Show Quantities
- Show Custom View

[27] Select **Show All** before continuing to step [28].

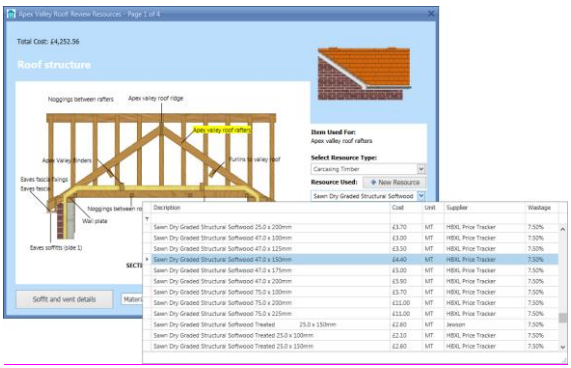




Notice that the **Apex Valley Roof Rafters** are currently set to **Sawn Dry Graded Structural Softwood 47.0 x 125mm.** Let's say that you want to change this timber to **47.0 x 150mm**.

[28] Click the **Resources Wizard** button in the top right of the toolbar.

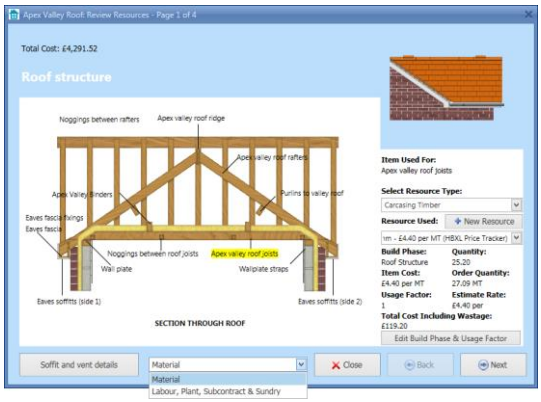
[29] A dialog will pop up which will allow you to review and change any item of **Material**, **Labour**, **Plant** and **Sundry** that is being used inside the **Worksheet**. Click on the **Apex Valley Roof Rafters** label**.** Notice that this item is now highlighted in yellow.



[30] On the right hand side of the dialog you will see that the **Resource Used** i.e. **Sawn Dry Graded Structural Softwood 47.0 x 125mm** and also the **Cost, Estimate Rate, Total Item Cost** and **Order Quantity** are also displayed here for this product. To change the **Resource Used,** simply select a different timber from the **Resource Used** drop-down menu. Select **Sawn Dry Graded Structural Softwood 47.0 x 150mm**.

[31] The **Edit Resource** dialog box pops up. Click **OK** to confirm the change. Notice that the **Cost, Estimate Rate, Total Item Cost** also change to reflect the new timber.

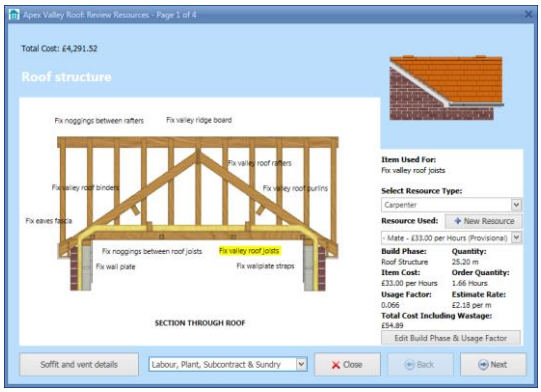
NOTE: You can swap any material at any time from inside the **Worksheet** by pressing the **Resources Wizard** button.

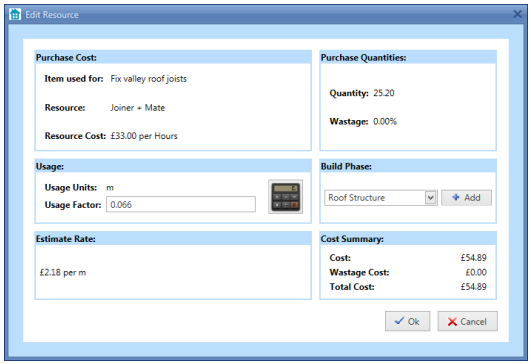


[32] You can also look at **Labour** and **Plant** associated with the rafters in the same way. To do this select **Labour, Plant, Subcontract** and **Sundry** from the drop down menu at the bottom of the page.

[33] Notice that the drawing now has labels which list the **Labour**, **Plant** and **Sundry** items associated with this part of the **Apex Valley Roof.** Click on **Fix Valley Roof Joists** to review the labour for this item.

[34] This dialog box shows you that the **Specification** currently specifies that this work is done by a joiner and mate at their current hourly rate of £27 per hour and that it will take them just under 2 hours at a rate of about three and a half mins per metre of joist. Let's say your joiner works a little slower than that. We can easily change his rate of working by clicking on the **Edit Build Phase & Usage Factor** button.



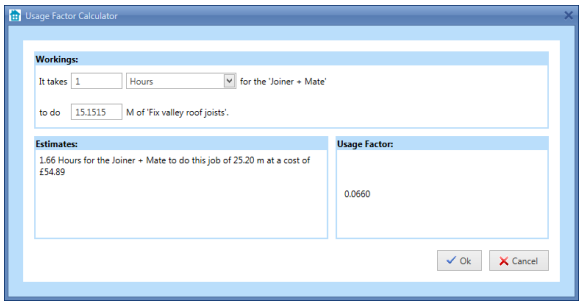


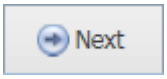
The **Edit Resource** dialog box pops up.

[35] If your joiner actually takes around 4 mins to fix each metre of joist i.e 0.06667 of an hour per metre (0.06667 is 4 mins/60 mins) then change the **Usage Factor** to 0.06667 to show that your joiner works at a rate of 4 mins per metre of joist.

[36] Notice that the **Estimate Rate** and **Total Cost** have increased accordingly. Click **OK** to close the **Edit Build Phase & Usage Factor** dialog box.

TIP: To help you work out what **Usage Factor** you should enter, click on the **Usage Factor Calculator** button.



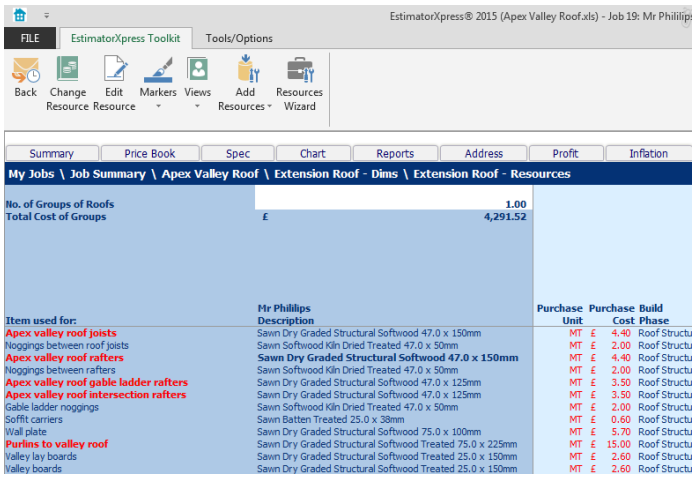


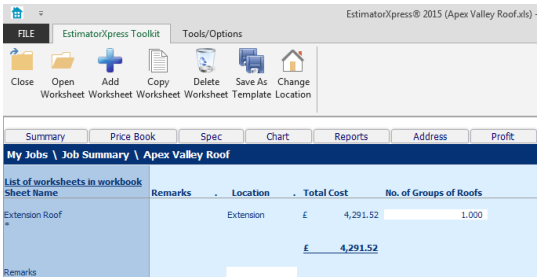
[37] Click **Next** in the corner of the **Resources Wizard** dialog to review all the other resources that are required for the construction of the **Apex Valley Roof.** Click on any of them to highlight them in yellow and then make any changes by selecting alternative resources from the **Product Used** drop down menu.

[38] When you get to the last page, click **Finish** to return to **Apex Valley Roof Worksheet Resources Output** screen. Notice that the timber you changed is now showing in **bold** to indicate to you that this item is no longer what is specified in the **Job Specification** and that the price has been recalculated taking this change into account.

[39] Assuming you are now satisfied with the estimate output for the **Apex Valley Roof,** close the **Apex Valley Roof Workbook** by pressing the **Back** button to return to the **Apex Valley Roof Worksheet Dimensions** screen.

[40] Press the **Close** button to return to **Summary of Apex Valley Roof Workbook**.



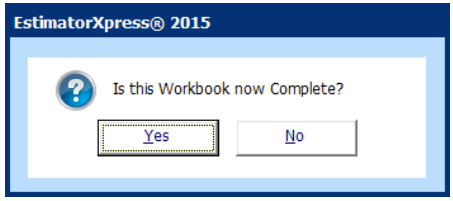


[41] Note the price in the **Summary of Apex Valley Roof**.

[42] To return back to **Job Summary**, press the **Close** button. This will automatically save your **Apex Valley Roof Workbook.**

[43] A dialog box pops up asking if the item is now complete. Click **Yes**.

You will now see a final estimate costing for your **Apex Valley Roof** on screen.



If you wish to stop and close this current Estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.

2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.

3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button in the top right of screen.

STRUCTURAL OPENING

10.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

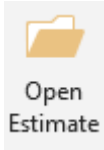
If you have joined this tutorial after having closed **EstimatorXpress®**, see the following steps.

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

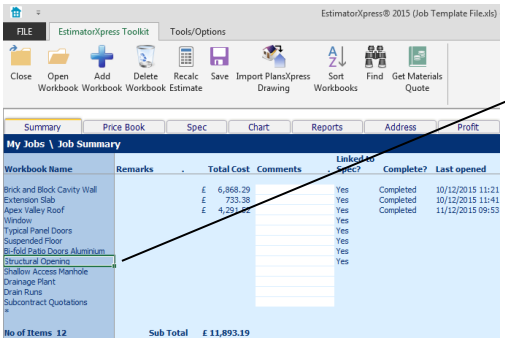
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



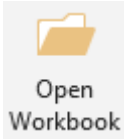
This tutorial leads you through estimating the openings that are required for the new layout formed by the extension using the **Structural Opening Workbook**.

The **Structural Opening** is a **Specification Linked Workbook**. However, you must also specify a number of sundry items of **Labour** and **Plant** (see page 18 for an explanation of this). **EstimatorXpress®** will automatically calculate all **Materials**, **Labour** and **Plant** to form the opening, fit lintels, plastering and decorating although it is recommended that you carefully scrutinise the **Labour** and **Plant** items carefully as they are not *directly* dependent on the size of the opening.

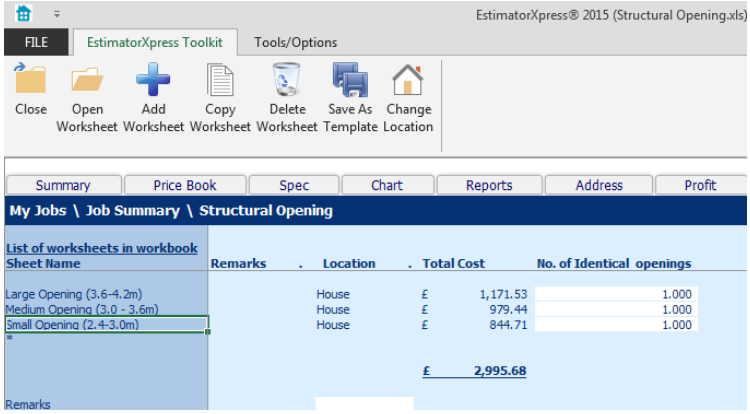
NOTE: **EstimatorXpress®** also includes a **Small Structural Opening Workbook** for estimating door sized openings etc.



[1] To start estimating your windows you must select the **Structural Openings Workbook** from inside the **Job Summary.**

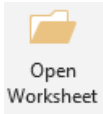


[2] Press the **Open Workbook** button.

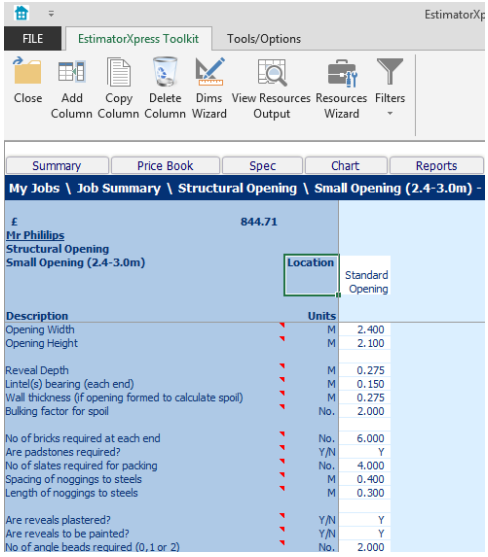


EstimatorXpress® then transfers you into the **Summary of Structural Openings Workbook.**

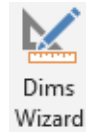
The **Summary of Structural Openings Workbook** is used to list all the structural openings that you may have within your estimate. Each different type or size opening must be estimated separately and listed in this screen. A **Worksheet** containing a three different sized openings is automatically included in this type of **Workbook.** We are only going to use the **Small Opening Worksheet** so set the No. of Identical openings for the other two sheets to 0.



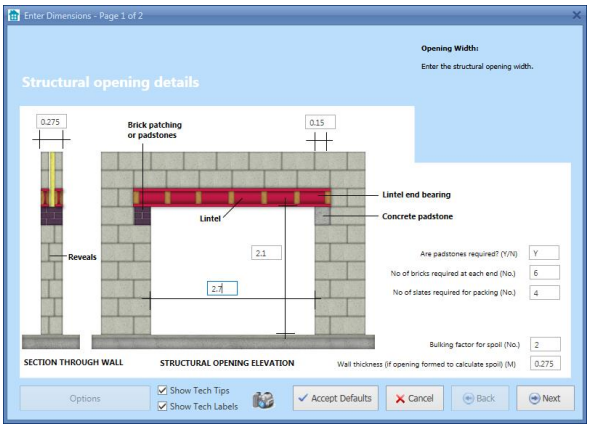
[3] Rather than creating a new **Worksheet** yourself, open the existing **Small Opening Worksheet** by selecting the **Worksheet** and pressing the **Open Worksheet** button.



EstimatorXpress® will automatically load the dimensions from the **Standard Opening** template into the white column in the **Small Opening Worksheet Dimensions** screen. The dimensions that have already been set up in the template will speed up the estimating process. By simply making a few changes to these template dimensions, a new cost will automatically be calculated for our specific opening.



[4] Click anywhere in the column of dimensions and press the **Dims Wizard** button to open up the **Dimensions Wizard** dialog box containing drawings to assist you in entering and confirming dimensions for the **Structural Opening.**



[5] Enter the **Opening Width** of 2.7.

[6] Enter the **Opening Height** of 2.1.

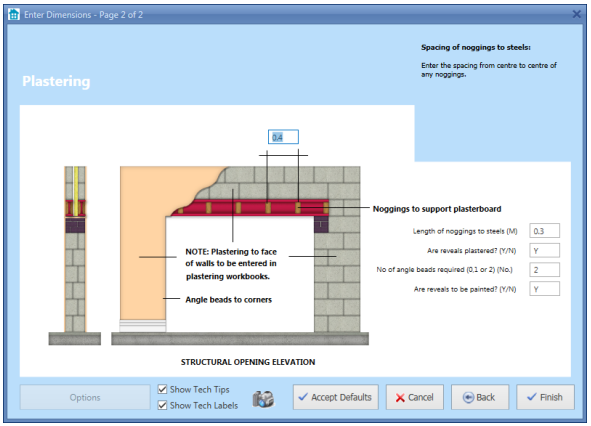
[7] The **Reveal Depth** should automatically be set to 0.275. Press **Enter.**

[8] Confirm the **Lintel Bearing (each end)** of 0.150.

[9] Confirm whether **Padstones** are required, the **number of bricks required** to form them and the **number of slates required for packing**.

[10] Confirm **Bulking Factor for Spoil** of 2.

[11] Enter the **Wall Thickness** of 0.275 (NOTE: This is the width of the existing wall).

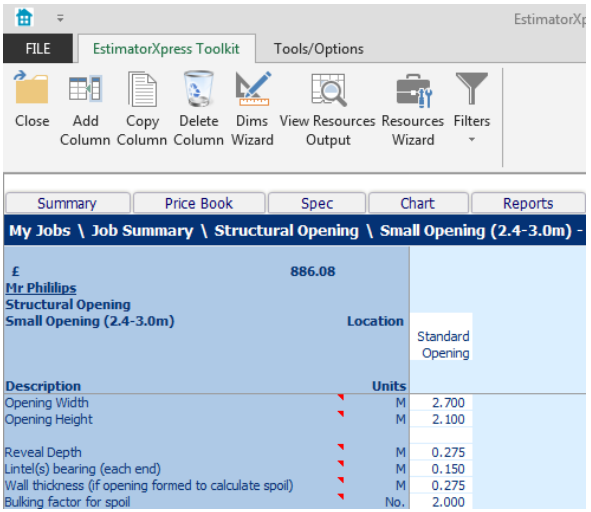


[12] Click **Next.**

[13] Confirm the **Length of noggings to steel.**

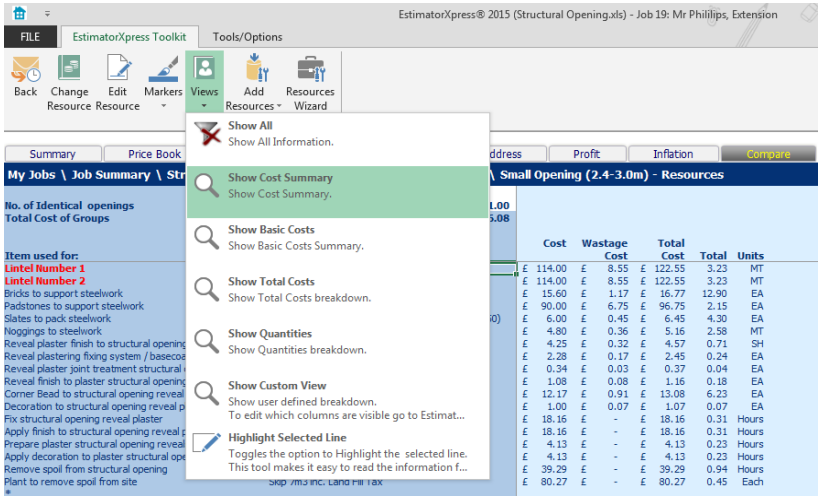
[14] Confirm that **Reveals** are to be **Plastered** and **Painted.**

[15] Enter **2** for the **Number of Angle Beads Required.**



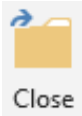
[16] Click **Finish** to return to the **Structural Opening Worksheet** screen.

[17] Before you press **Close** button to return to the **Summary of Structural Openings Workbook,** you might want to view the output of your **Structural Opening Workbook** by clicking on the **View Resources Output** button.

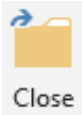


[18] Use the **Views** drop-down menu in the **Resources Output** screen to view the costs and quantities of materials, labour and plant required to form the **Structural Opening.**

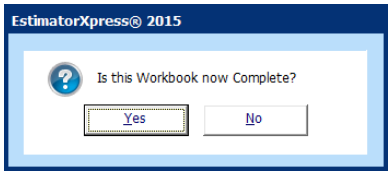
[19] Assuming you are satisfied with the output, press the **Back** button to return to **Structural Opening Worksheet Dimensions** screen.



[20] Press the **Close** button to return to the **Summary of Structural Openings Workbook**



[21] Now to return to the **Job Summary**, press the **Close** button. This will automatically save your **Structural Opening** estimate.



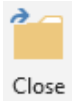
[22] A dialog box pops up asking if the item is now complete. Click **Yes**.

You will now see a final estimate costing for your **Structural Opening** on screen together with all of the previously estimated items in the **Job Summary.**

If you wish to stop and close the current estimate:

1. Press **Close** button on the top left of the **Job Summary** screen.

2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press **Exit** button in the top right of screen.

WINDOWS

10.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

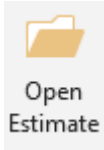
If you have joined this tutorial after having closed **EstimatorXpress®**, see the following steps.

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press **My Estimates** button at the top of the **Main Menu** screen.

2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

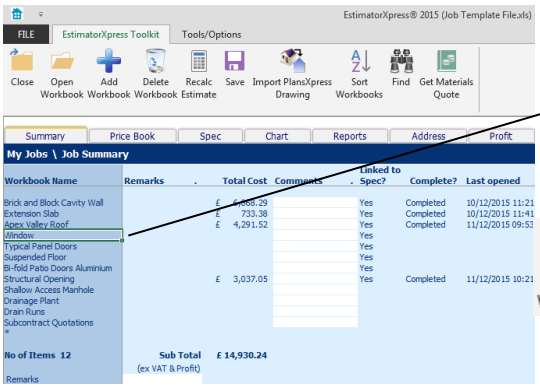
3. Press **Open Estimate** button. You are now ready to start the next tutorial.



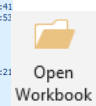
This tutorial leads you through the estimating of the windows of the extension using the **Windows Workbook**. If you refer to your plan of the extension, you will see that there are 2 identically sized windows.

If you were estimating several **Windows** of different sizes or **Windows** with different types of frame, each different size/type must be estimated separately in a different **Worksheet**.

The **Windows Workbook** is an example of a **Specification Linked Workbook**. However, you must also specify a number of **Sundry** items (see page 18 for an explanation of this). NOTE: **EstimatorXpress®** will automatically calculate all **Materials**, **Labour** and **Plant** to construct the **opening** around the window based on the dimensions you input, whilst as mentioned above, you must specify your own sundry items such as the window and lintel as well as the fitting costs, because these items are independent of the dimensional calculations. To clarify this concept, have a look at your first window.



[1] To start estimating your windows you must select the **Window Workbook** from the **Job Summary**.



[2] Press the **Open Workbook** button.

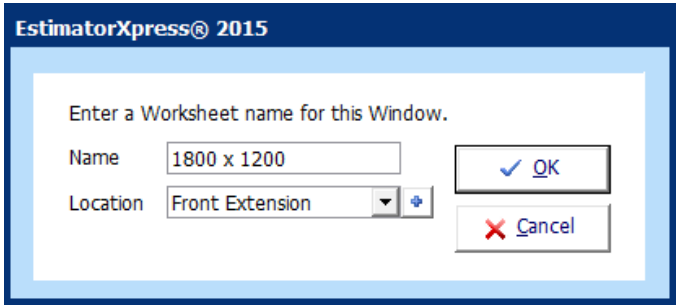
EstimatorXpress® then transfers you into the **Summary of Windows Workbook**. The **Summary of Windows Workbook** is used to list the range of windows **Worksheets** that you may have within your estimate such as 1.2 x 1.2m or 1.8 x 1.2m. Each different type or size window must be estimated separately and listed in this screen.

A dialog box will automatically pop up asking you to name and give a location for the **Window**.

[3] Type 1800 x 1200 as the **Name** (do not enter full stops, commas or other symbols into the dialog box).

NOTE: This is just a name given to the window for your reference and does not affect the calculations

[4] In the drop down box below, specify the location of the window e.g. **Front Extension** Click **OK** when you have finished.

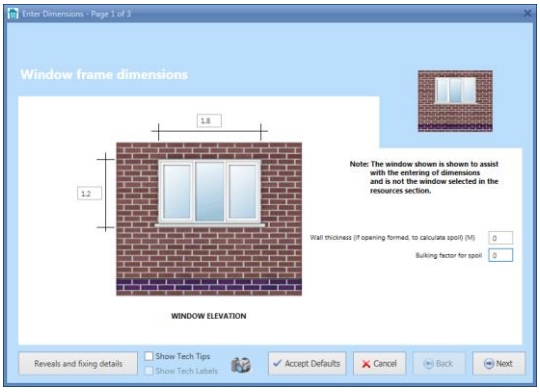


[5] **EstimatorXpress®** then transfers you into the **Dimensions** screen of the **1800 x 1200 Window Worksheet.**

There is only one template available for estimating **Windows,** so **EstimatorXpress®** will automatically load the dimensions from this **Standard Window Template** into the white column in the **1800 x 1200 Window Worksheet Dimensions** screen. The dimensions that have already been set up should speed up the estimating process. By simply making a few changes to these dimensions, a new cost will automatically be calculated.

[6] Click anywhere in the column of dimensions and press the **Dims Wizard** button.

The **Dimensions Wizard** will open up a dialog box containing a drawing to assist you in entering and confirming dimensions for the **Windows.**



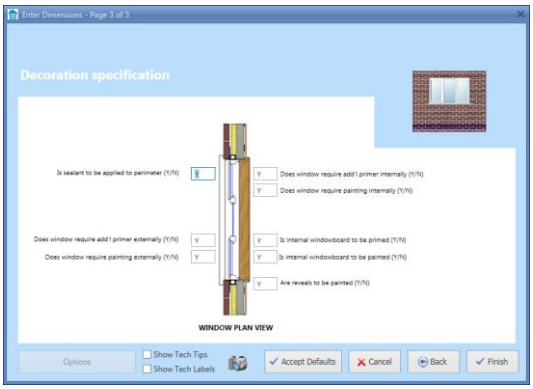
[7] Check the **Window height** is 1.200 metres.

[8] Check the **Window width** is 1.800 metres.

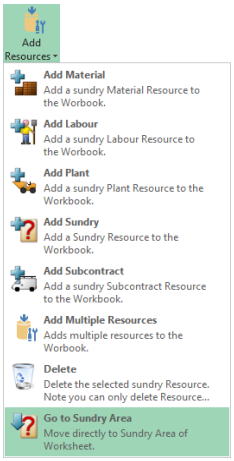
[9] If either dimension is incorrect, type the correct value into the white cell provided and press **Enter** key after each one. Ensure that the **Wall Thickness** and **Bulking Factor** are set to **0** as the windows are being fitted into the new external walls of the extension.

[10] Click **Reveals and Fixing Details** button on the bottom left hand side of the **Dimensions Wizard** to check this information. If you are happy with the standard data, click **Return.**

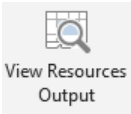
[11] Click **Next** and review the rest of the details for the **Window**. Most of the standard details copied from the template should apply to the **Extension.**



[12] Click **Next**. Once you are satisfied with all the items inside the **Windows Worksheet Dims Wizard** screens. Click **Finish** to return to the **Window Worksheet Dimensions** screen showing all the dimensions you have just entered.



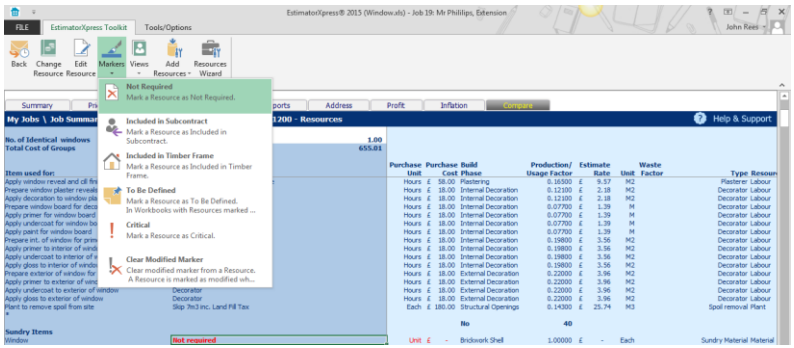
For this **Job** we are going to re-use the existing Windows from the original house. This means that you need to tell **EstimatorXpress®** that the Windows themselves are **Not Required.**



[13] To do this, click on **View Resources Output** button to view the list of materials, labour, plant and sundry items associated with this **Windows Worksheet.**

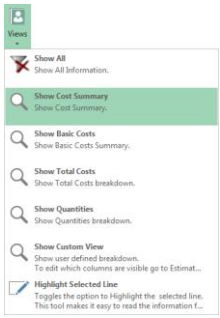
[14] The **Window** itself is listed under the **Sundry** items because the type of **Window** not directly dependent on the dimensions you have entered. To jump quickly down the screen to the **Sundry** items, click the **Add Resources** drop-down menu and select **Go to Sundry Area.**

Click on the **Window** itself and then in the **Markers** drop-down menu, select **Not Required.** The **Window** will change to **Not Required** and the **Total Cost of the Worksheet** will be automatically recalculated to deduct the associated cost.



You will remember that there are 2 windows of dimension 1800x1200.

[15] To estimate both of the identical **Windows**, which have identical dimensions you type the number of windows into the white cell at the top of the screen called **No. of identical Windows**. This would then multiply all resources, and subsequently the cost, by that factor. Enter 2 as shown below and press **Enter.**

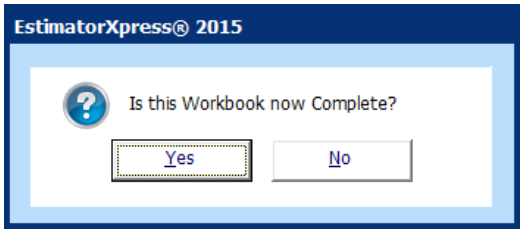


[16] To see the full output of your **1800x1200 Window Worksheet**, use the five output buttons from the **Views** drop-down menu on the toolbar.

- Show All
- Show Cost Summary
- Show Basic Costs
- Show Total Costs
- Show Quantities
- Show Custom View

[17] Assuming you are satisfied with the estimate output for the **Window Workbook**, return to the **Window Worksheet Dimensions** screen by pressing the **Back** button.

[18] Close the **Window Workbook** with the **Close** button to return to the **Summary of Window Workbook**.



[19] Click the **Close** button from the **Summary of Windows Workbook**. A dialog box pops up asking if the item is complete. Click **Yes**.

You will now see a final estimate costing for your **Window** in the **Job Summary.**

If you wish to stop and close the current estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.

2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.

3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

TYPICAL PANEL DOORS

20 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

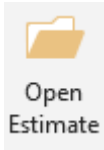
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

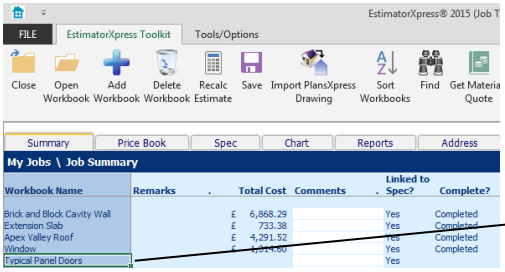
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

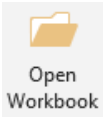
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



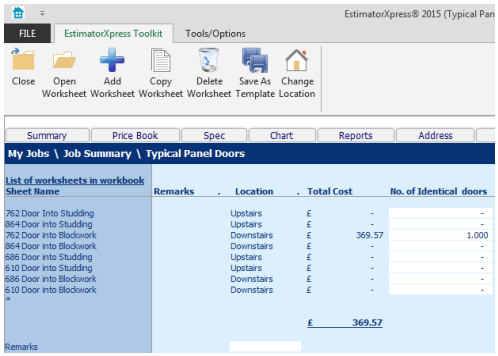
If you refer to your plan of the extension, you will see that we need to add a new internal door upstairs and form an opening through the existing cavity wall. This tutorial leads you through the estimating of the internal door that is to be added to the extension using a standard door (6”6” x 2”3” / 2m x 0.85m) and also forming the opening.

Doors are examples of **Specification Linked Workbooks**. However, you must also specify a number of sundry items associated with doors (see page 18 for an explanation of this). **EstimatorXpress®** will automatically calculate all materials, labour and plant to construct the ***opening*** around the door based on the dimensions you input, but as mentioned above you must specify your own sundry items such as the door itself and its frame, which are independent of the dimensional calculations. To clarify this concept, have a look at your first door.





[1] To start estimating your internal doors you must select the **Typical Panel Doors Workbook** and press the **Open Workbook** button.

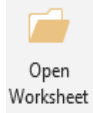


[2] You are now transferred to **Summary of Typical Panel Doors Workbook**.

The **Summary of Typical Panel Doors Workbook** already contains 8 standard **Worksheets** for estimating internal doors: Standard and Wide sized doors for upstairs and downstairs into both blockwork and studding.

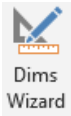
You can add your own **Worksheets** by clicking **Add Worksheet** if you need to estimate non-standard door sizes. You can estimate multiple identical doors by changing the number in the **No. of Identical Doors column. For now** set **No. of Identical Doors** to 0 for all doors apart from **762 Door into Blockwork.**

For now just select **762 Door into Blockwork** and click **Open Worksheet.**

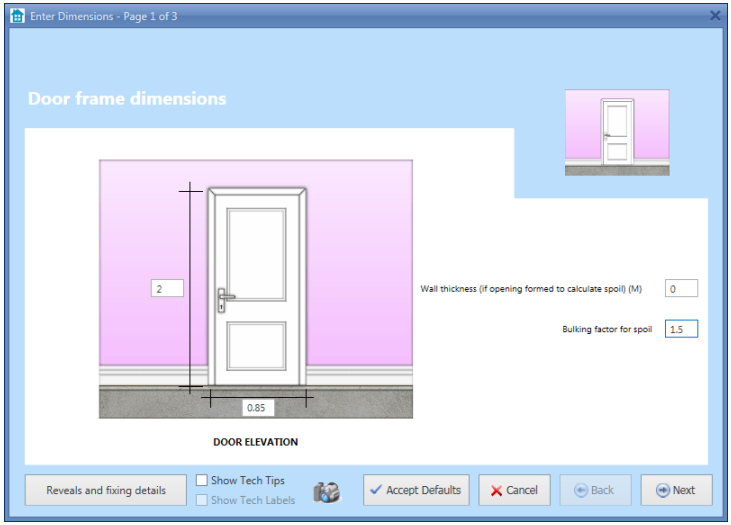


EstimatorXpress® then transfers you into the **Dimensions section** of the **Typical Panel Door Door into Blockwork Worksheet.**

[3] A template for a **Standard Door No Reveals Fully Painted** is automatically loaded into the **Worksheet** for you to speed up the estimating process. Click anywhere on this column of data to select it.



[4] Press the **Dims Wizard** button. **EstimatorXpress® Dimensions Wizard** will pop up containing a diagram to assist you in entering and confirming dimensions for the **Internal Doors.**



[5] Enter the door height of 2
Press **Enter.**

[6] Enter the door width of 0.85
Press **Enter.**

[7] Enter the thickness of the wall 0.275
EstimatorXpress® will automatically calculate the amount of spoil that will be created when the opening is formed.

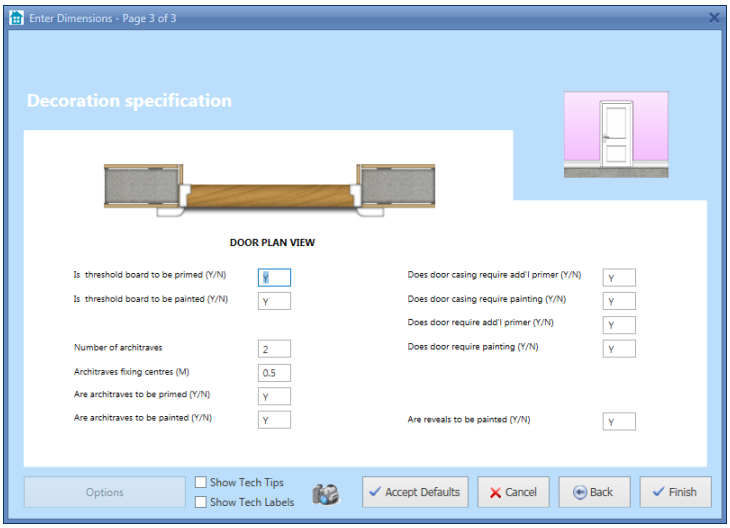
[8] Now click on **Reveal and fixing details** button on the bottom left of the dialog box.

Change the **Reveal Depth** to 0.15 and leave the **Lintel Bearing, Casing Fixing Centres** and **Casing fixing Centres**.

[9] Click **Return** for now to return to the main screen of the **Dimension Wizard.**

[10] You are returned to **Door Frame Dimensions** page. Click **Next** to continue.

[11] Ensure that the **reveals are to be plastered**, **add a threshold board** and 2 **angle beads**. Click **Next.**

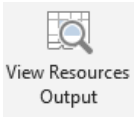


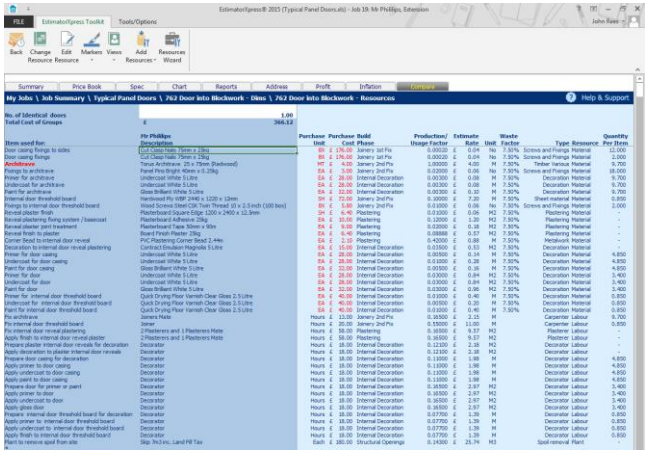
[12] On the final screen, confirm the finishes you require for the internal door including painting the reveals.

[13] Click **Finish** to return to the **Typical Panel Doors Worksheet Dimensions** screen showing all the dimensions you have just entered.

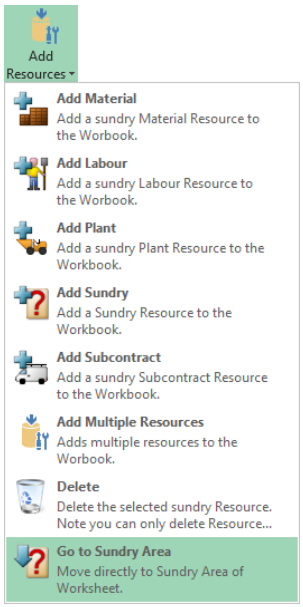
You now need to ensure we have allowed for the lintels since there are two leafs to the existing wall to be supported. Because these items are not automatically calculated from dimensions, only one lintel is included as default. You need to add a second one to the sundries section of the **Workbook**.

[14] Press the **View Resources Output** button to go to the **Typical Panel Doors Worksheet Resources Output** screen.





Towards the top of this screen, you will see resources, which relate to the actual opening of the door such as plastering, fixings, painting and associated labour. These are automatically adjusted by **EstimatorXpress®** to match the size of the opening that you entered in the **Dimensions section**.



[15] From the **Add Resources** drop down menu, click on **Go to Sundry Area** to move quickly to the **Sundry Items** associated with **Typical Panel Doors.**
This section of the screen relates to the various lump sum items, which make up the internal door, e.g. the actual door, the door casing, lintel and door handle etc. Clearly, these items do not automatically change as a result of alterations to the dimensions you input. These **Sundry Items** are not linked to the **Specification**.

A standard door and frame are already included in your estimate, which are suitable for the size opening. If they were not suitable you could change them for other resources using the **Resources Wizard** or **Change Resource** button.

[16] Now select the Internal Lintel and then scroll across the screen to the white cells in the column called **Quantity Per Item**.

Sundry Items	
Door	Internal Door 6 Panel Textured Undercoated 762 x 1981mm
Door casing	Unprimed 138 x 32mm Door Lining Set Loose Stops 5100mm
Door furniture	Georgian Brass Internal Latch Pack
Hinges	Butt Hinge Brassed 76mm
Internal lintel	Prestressed Concrete Lintel 65 x 100 x 1050mm
Form opening	Bricklayer
Fix lintel	Bricklayer
Fix door casing	Joiner
Hang door	Joiner
Fix door furniture	Joiner
Return to ease door	Joiner
Plant for forming opening (1)	Not required
Plant for forming opening (2)	Not required
*	

[17] Change the number required to **2** for **Internal Lintel**.

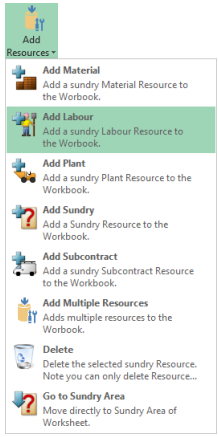
Sundry Items			
Door	Internal Door 6 Panel Textured Undercoated 762 x 1981mm	Material	1.000
Door casing	Unprimed 138 x 32mm Door Lining Set Loose Stops 5100mm	Material	1.000
Door furniture	Georgian Brass Internal Latch Pack	Material	1.000
Hinges	Butt Hinge Brassed 76mm	Material	1.000
Internal lintel	Prestressed Concrete Lintel 65 x 100 x 1050mm	Material	2.000
Form opening	Bricklayer	Labour	1.000
Fix lintel	Bricklayer	Labour	1.000
Fix door casing	Joiner	Labour	1.000
Hang door	Joiner	Labour	1.000
Fix door furniture	Joiner	Labour	1.000
Return to ease door	Joiner	Labour	1.000
Plant for forming opening (1)	Not required	Plant	1.000
Plant for forming opening (2)	Not required	Plant	1.000
*			

We also now need a bricklayer to fix the additional lintel. Let's allow for 4 hours to do this.

[18] Click on the white cell in the row called **Fix Lintel** and change the hours to **4** in the **Quantity Required Column** and then press **Enter.**

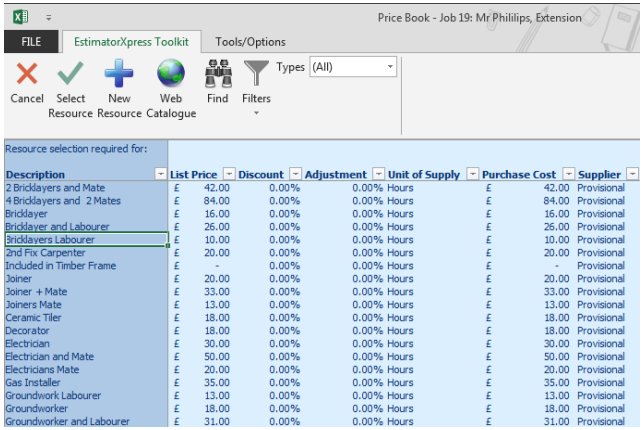
Sundry Items			
Door	Internal Door 6 Panel Textured Undercoated 762 x 1981mm	Material	1.000
Door casing	Unprimed 138 x 32mm Door Lining Set Loose Stops 5100mm	Material	1.000
Door furniture	Georgian Brass Internal Latch Pack	Material	1.000
Hinges	Butt Hinge Brassed 76mm	Material	1.000
Internal lintel	Prestressed Concrete Lintel 65 x 100 x 1050mm	Material	2.000
Form opening	Bricklayer	Labour	1.000
Fix lintel	Bricklayer	Labour	4.000
Fix door casing	Joiner	Labour	1.000
Hang door	Joiner	Labour	1.000
Fix door furniture	Joiner	Labour	1.000
Return to ease door	Joiner	Labour	1.000
Plant for forming opening (1)	Not required	Plant	1.000
Plant for forming opening (2)	Not required	Plant	1.000
*			

He might also need labourer to assist him. Let's allow for 4 hours of a bricklayer's labourer.



[19] Click on **Add Resources** on the toolbar and select **Add Labour**.

EstimatorXpress® will now open up the **Labour** section of the **Price Book** over the top of the **Resources section** of the **Workbook.**



Description	List Price	Discount	Adjustment	Unit of Supply	Purchase Cost	Supplier
2 Bricklayers and Mate	£ 42.00	0.00%	0.00%	Hours	£ 42.00	Provisional
4 Bricklayers and 2 Mates	£ 84.00	0.00%	0.00%	Hours	£ 84.00	Provisional
Bricklayer	£ 16.00	0.00%	0.00%	Hours	£ 16.00	Provisional
Bricklayer and Labourer	£ 26.00	0.00%	0.00%	Hours	£ 26.00	Provisional
Bricklayers Labourer	£ 10.00	0.00%	0.00%	Hours	£ 10.00	Provisional
2nd Fix Carpenter	£ 20.00	0.00%	0.00%	Hours	£ 20.00	Provisional
Included in Timber Frame	£ -	0.00%	0.00%	Hours	£ -	Provisional
Joiner	£ 20.00	0.00%	0.00%	Hours	£ 20.00	Provisional
Joiner + Mate	£ 33.00	0.00%	0.00%	Hours	£ 33.00	Provisional
Joiners Mate	£ 13.00	0.00%	0.00%	Hours	£ 13.00	Provisional
Ceramic Tiler	£ 18.00	0.00%	0.00%	Hours	£ 18.00	Provisional
Decorator	£ 18.00	0.00%	0.00%	Hours	£ 18.00	Provisional
Electrician	£ 30.00	0.00%	0.00%	Hours	£ 30.00	Provisional
Electrician and Mate	£ 50.00	0.00%	0.00%	Hours	£ 50.00	Provisional
Electricians Mate	£ 20.00	0.00%	0.00%	Hours	£ 20.00	Provisional
Gas Installer	£ 35.00	0.00%	0.00%	Hours	£ 35.00	Provisional
Groundwork Labourer	£ 13.00	0.00%	0.00%	Hours	£ 13.00	Provisional
Groundworker	£ 18.00	0.00%	0.00%	Hours	£ 18.00	Provisional
Groundworker and Labourer	£ 31.00	0.00%	0.00%	Hours	£ 31.00	Provisional

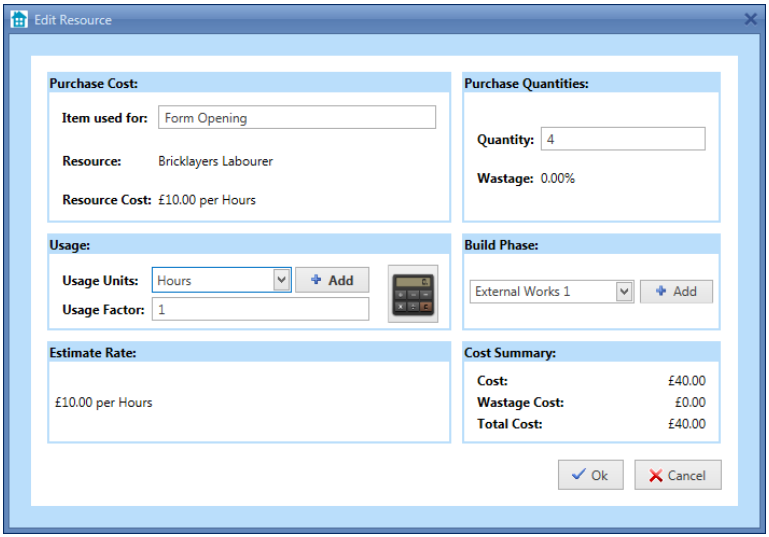
[20] Select **Bricklayer's Labourer** with the mouse and click on the **Select Resource** button located in the top left of the main screen outside of the **Price Book** window.

The **Edit Resource** dialog will pop up asking you what this new labour item is going to be used for.

[21] Enter **Form Opening** in the **Item Used For** field and then change the **Build Phase** to **Brickwork Shell** so that this labour item is linked to the correct **Build Phase**.

[22] Select **Hours** for the **Usage Units**.

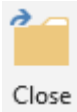
[23] Finally change the **Quantity** to **4** (for 4 hours) and then, assuming you are happy with the price at £10 per hour, click **OK.**



You will notice that this item is now in bold type to indicate that it is a user-added item. You have now completed the **Typical Panel Doors Workbook**.

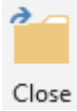
Sundry Items						
Door	PREMDOR Int Colonist 6P Textured Door Undercoated 762 x 1981 ... 12411	EA	£	35.45	Joinery 2nd Fix
Door casing	Door Lining Set Unprimed (loose stops) 686/762 32 x 138 x 5100mm	EA	£	15.40	Joinery 1st Fix
Door furniture	JEWSON Georgian Polished Brass Internal Latch Pack JD023	EA	£	13.85	Joinery 2nd Fix
Hinges	Narrow Pattern Butt Hinge Cranked Knuckle Electro Brassed 76mm 1838	PR	£	1.07	Joinery 2nd Fix
Internal lintel	STRESSLINE Prestressed Concrete Lintel 100 x 65 x 1050mm	EA	£	8.06	Brickwork Shell
Form opening	Bricklayer	Hours	£	16.00	Brickwork Shell
Form opening	**Bricklayers Labourer**	Hours	£	10.00	Brickwork Shell
Fix lintel	Bricklayer	Hours	£	16.00	Brickwork Shell
Fix door casing	Joiner	Hours	£	17.00	Joinery 1st Fix
Hang door	Joiner	Hours	£	17.00	Joinery 2nd Fix
Fix door furniture	Joiner	Hours	£	17.00	Joinery 2nd Fix
Return to ease door	Joiner	Hours	£	17.00	Completion
Plant for forming opening (1)	**Not required**	Unit	£	-	Structural Openings
Plant for forming opening (2)	**Not required**	Unit	£	-	Structural Openings
*					

TIP: If your estimate included several identical doors with identical dimensions you would type in the number of doors of the same dimensions into the white cell at the top of the screen called **No. of identical Doors.** This would then multiply all resources by that factor. The cost would subsequently be increased by that factor.

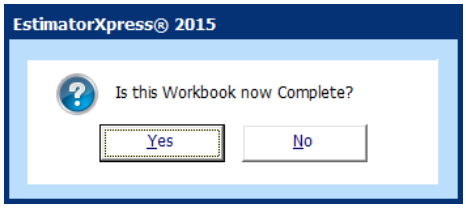


[24] Close the **Typical Panel Doors Workbook** with the **Close** button to return to **Summary of Typical Panel Doors Workbook**.

[25] Assuming you are satisfied with the estimate output for the internal doors, press the **Back** button to return to the **Typical Panel Doors Door into Blockwork Worksheet** dimensions screen.



[26] Click the **Close** button from the **Summary of Typical Panel Doors Workbook**.

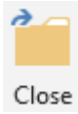


[27] A dialog box pops up asking if the item is now complete. Click **Yes**.

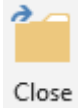
You will now see a final estimate costing for your **Typical Panel Doors** on screen together with all of the previously estimated items in the **Job Summary.**

If you wish to stop and close the current estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs** screen. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

BATHROOM FITTING OUT

10 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

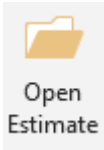
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

3. Press the **Open Estimate** button. You are now ready to start the next tutorial.

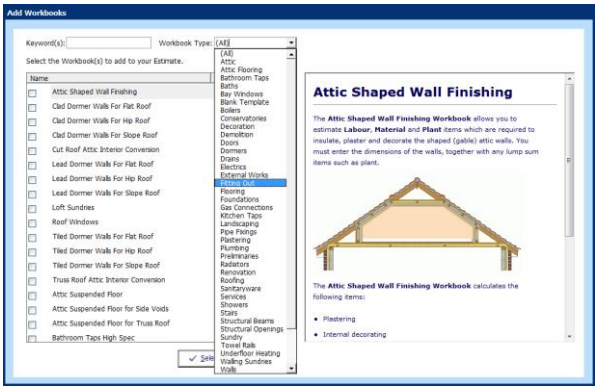


If you refer to your plan of the extension, you will see that we need to add a new bathroom to the 1st floor.This Tutorial leads you through the estimating of the various components of this bathroom using the **Bathroom & Cloaks Workbook.**

The **Bathroom & Cloaks Workbook** is an example of a **Composite Workbook** (see page 19 for an explanation of this). It is simply a collection of items of **Labour, Material** and **Plant** required to fit out various different bathrooms and cloakrooms. You should review each item to see if they are required and that the quantities and prices are adequate. The **Workbook** includes sanitaryware and fittings, boxing in of soil pipes and boxing of bath sides.

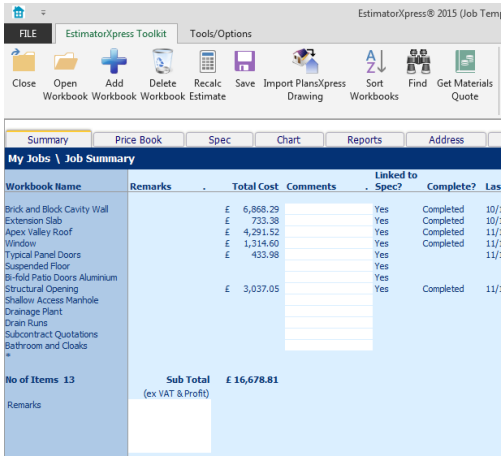
NOTE: There is a separate **Workbook** for **Ceramic Tiling** and the costs for the actual plumbing will be added as a **Subcontractor Quotation.**

[1] Since the **Bathroom & Cloaks Workbook** has not been automatically loaded as part of the **Extension Group of Workbooks** you selected when creating the Job, you need to add this **Workbook** to the **Job** by pressing the **Add Workbook** button in the **Job Summary**.

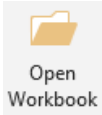


[2] Select the **Workbook Type** of **Fiting Out** from the Workbook Type dropdown at the top of the dialog box.

[3] Click the checkbox next to **Bathroom and Cloaks** in the dialog box that pops up and press the **Select** button.



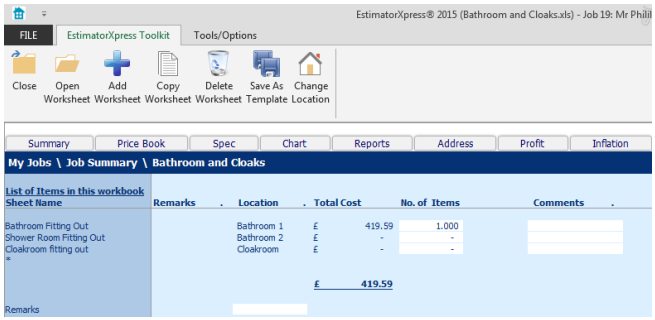
You will see that the **Bathroom & Cloaks Workbook** has been added to the list of **Workbooks** in the **Job Summary.**



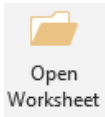
[4] To start estimating your Bathroom you must select the **Bathrooms & Cloaks Workbook** and press **Open Workbook** button.

You are now transferred to **Summary of Bathroom & Cloaks Workbook**.

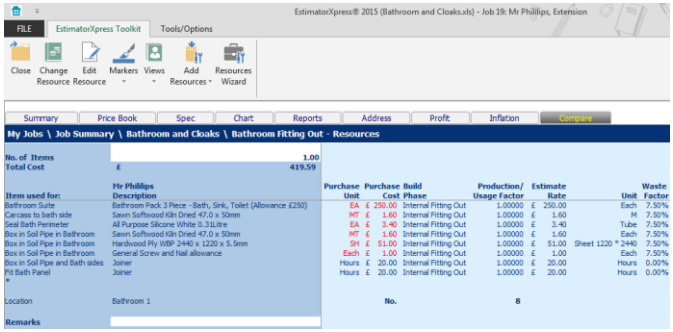
The **Summary of Bathroom & Cloaks Workbook** already contains 3 standard **Worksheet**s for estimating a standard bathroom, a standard shower room and a standard cloakroom. Each of these **Worksheets** can contain multiple bathrooms of the same **Specification**. You can also add your own additional **Worksheets** by clicking **Add Worksheet** if you need to estimate several bathrooms of different **Specification**s for a large house for example.



[5] You do not need the **Shower Room** or the **Cloakroom** this time so you can set the **No. Of Items** to 0 for each of these.

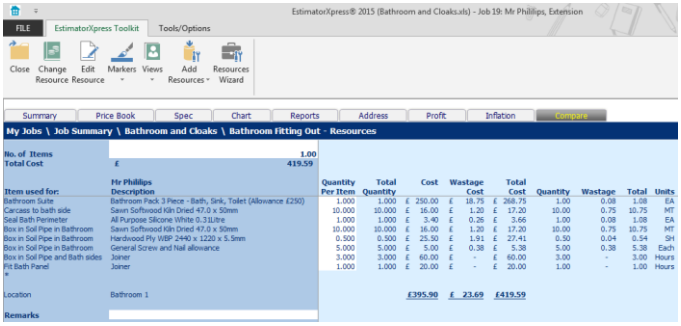


[6] Now click on **Bathroom Fitting Out** and press the **Open Worksheet** button.



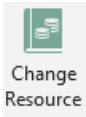
EstimatorXpress® then transfers you into the **Resources Section** for the **Bathroom Worksheet.**

Note that there is no **Dimensions** screen because this type of **Workbook** does not contain dimensions. It is a collection of sundry items including **Material** and **Labour** that do not depend upon any dimensions.



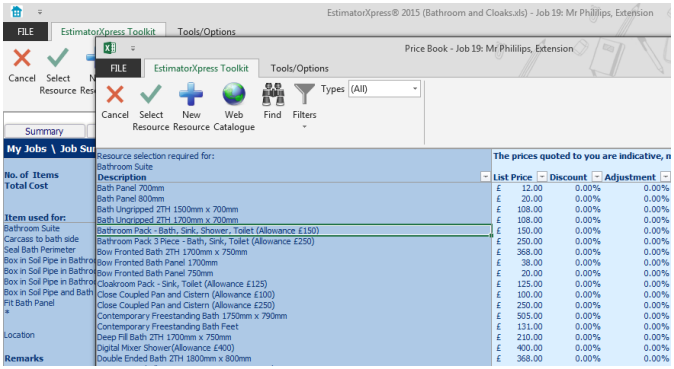
[7] Scroll across the screen until you come to the column titled **Quantity Per Item**. You can modify the quantity of the item required by typing into the white cells.

As you are only estimating the fitting of one bathroom, the standard values should be fine here.



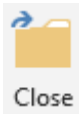
[8] If you want to change the **Bathroom Suite,** click on the **Bathroom Suite** and click the **Change Resource** button on the Toolbar.

The **Job Price Book** will then pop up over the top of your estimate and will open in the section containing alternative bathroom suites. Use the **Find** button to help you locate what you are looking for.

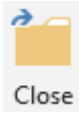


[9] Click on the suite you want and press the **Select Resource** button.

The new resources will then be transferred into your **Bathroom Fitting Out Worksheet** and the price will be adjusted accordingly.



[10] Once you are happy with these values, press the **Close** button to return to **Summary of Bathroom & Cloaks Workbook**.



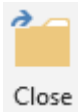
[11] Now to return back to **Job Summary**, again press the **Close** button to close the **Summary of Bathroom & Cloaks Workbook**. This will automatically save your **Bathroom Fitting Out** estimate.

[12] A dialog box pops up asking if the item is now complete. Click **Yes**.

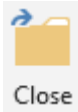
You will now see a final estimate costing for your **Bathroom** on screen together with all of the previously estimated items in the **Job Summary.**

If you wish to stop and close what you have estimated so far:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs**. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

SUBCONTRACT QUOTATIONS

5:00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

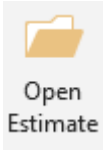
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.

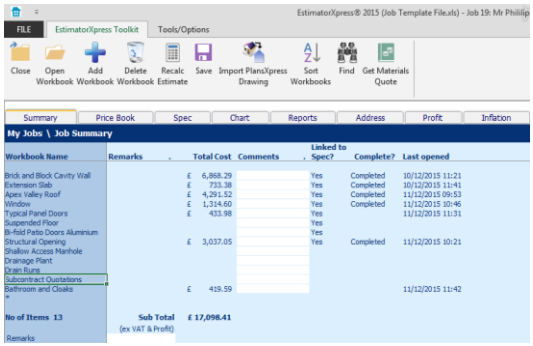
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

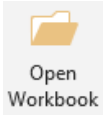
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



This tutorial leads you through adding in budget figures for **Subcontract Quotations** for **Plumbing** and **Electrics** for the Extension.

The **Subcontract Quotations Workbook** is an example of a **Composite Workbook** (see page 19 for an explanation of this). It is simply a checklist of possible subcontract costs including Groundworks, Bricklayer, Scaffolding, Carpentry, Roof Tiling, Joinery, Plastering, Electrical, Plumbing, Ceramic Tiling, Decorating, Kitchen Fitting, Landscape, General and Specialist**.**



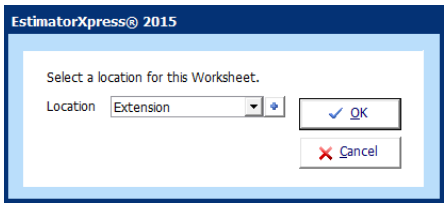


[1] To add **Subcontract Quotations** to your **Estimate**, click on the **Subcontract Quotations Workbook** and press the **Open Workbook** button.

You are now transferred to **Summary of Subcontract Quotations Workbook**.

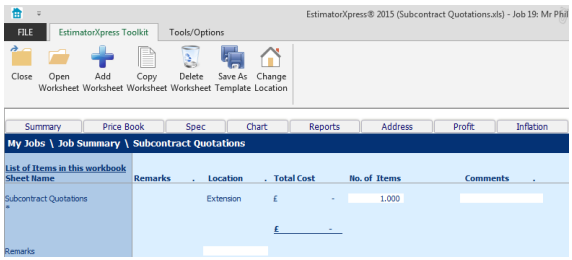
[2] The **Summary of Subcontract Quotations Workbook** already contains a standard **Worksheet** which contains several possible subcontract quotations.

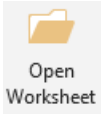
[3] Before you go any further you may wish to change the standard **Location** given to the **Subcontract Quotations Worksheet.** Select **Subcontract Quotations** and press the **Change Location** button. The location of a **Worksheet** is used to sort information in **Reports**.



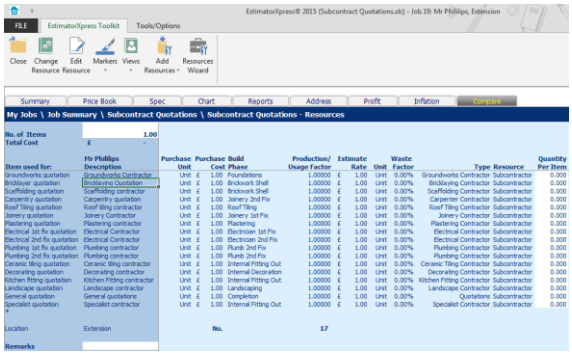
A dialog box pops up.

[4] Use the drop down box below to give the **Subcontract Quotations** a location. Select whatever location you think is most suitable e.g. Extension. Click **OK**.



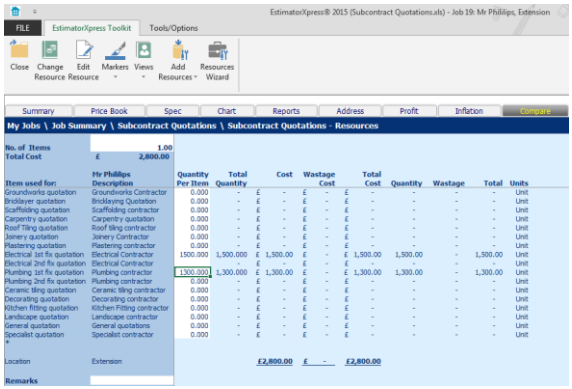


[5] Now select **Subcontract Quotations Worksheet** and press the **Open Worksheet** button.



EstimatorXpress® then transfers you into the **Resources Section** of the **Subcontract Quotation Worksheet.**

Note that there is no **Dimensions** screen because this type of **Workbook** does not contain dimensions. It is a collection of sundry subcontract items to which you can add whatever price you have been quoted or a budget figure.

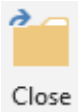


[6] Scroll across the screen until you come to the column titled **Quantity Per Item.** You can modify quantity of the item required by typing into the white cells. The prices are all currently set to zero. All **Subcontract Quotations** are set to a default unit cost of £1 so whatever number you enter into the **Quantity Per Item** column will be multiplied by £1 to calculate a price.

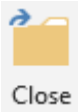
[7] Let's say that we have received a quotation from a plumber for £1300 to carry out the necessary plumbing for the new bathroom. Enter 1300 to the **Quantity Per Item** column of the row labelled **Plumbing 1st fix Quotation** and press **Enter.** Notice that the cost of £1300 automatically appears in the **Cost** column.

[8] Finally, add an **Electrical 1st fix Quotation** for £1500 by entering 1500 into the **Quantity Per Item** column of the row labelled **Electrical 1st fix Quotation** and press **Enter.**

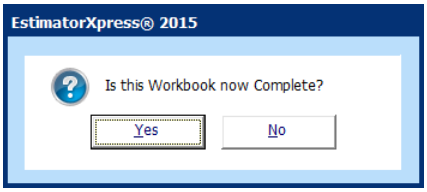
Notice again that the cost of £1500 automatically appears in the **Cost** column.



[9] Once you are happy with these values, press the **Close** button to return to **Summary of Subcontract Quotations Workbook**.



[10] Now to return back to **Job Summary**, again press the **Close** button. This will automatically save your **Subcontract Quotations.**

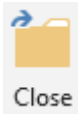


[12] A dialog box pops up asking if the item is now complete. Click **Yes**.

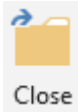
You will now see a final estimate costing for your **Subcontract Quotations** on screen together with all of the previously estimated items in the **Job Summary.**

If you wish to stop and close what you have estimated so far:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs**. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

DRAIN RUNS, DRAINAGE PLANT AND MANHOLES

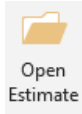
15.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed **EstimatorXpress®**, see the following steps.

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.

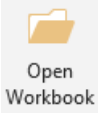


This tutorial leads you through the estimating of the drain runs and drainage fittings.

This tutorial will help you estimate 2 metres of 600mm drain run to connect the new soil and vent pipe to existing drains, plus a shallow access manhole.

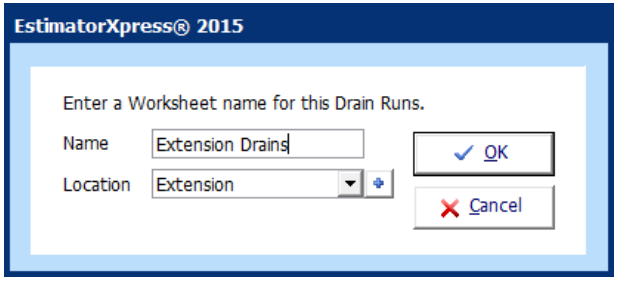
Drain Runs

The **Drain Runs Workbook** is an example of a **Non-Specification Linked Workbook**. It is used to calculate the length of drain run required as well as all the associated resources based on the dimensions you input (See page 20 for a full explanation). Drainage fittings are added in the Sundry Items Area because these resources are independent of the dimensions of the **Drain Runs**.

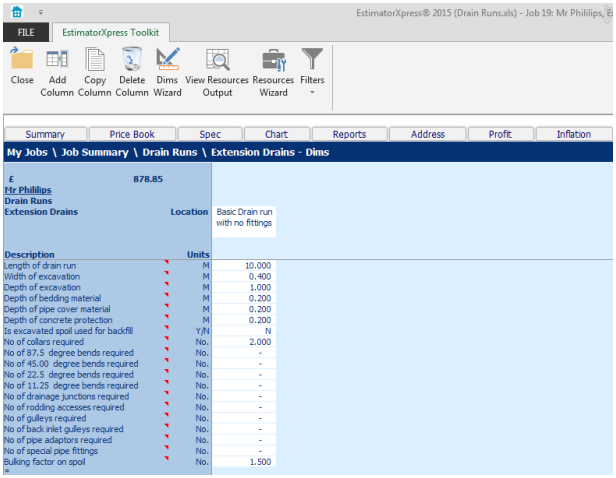


[1] To start estimating your **Drain Runs** select the **Drain Runs Workbook** in the **Job Summary** and press the **Open Workbook** button.

You are now transferred to **Summary of Drain Runs Workbook** and a dialog box will automatically pop up asking you to name and give a location for the drains.



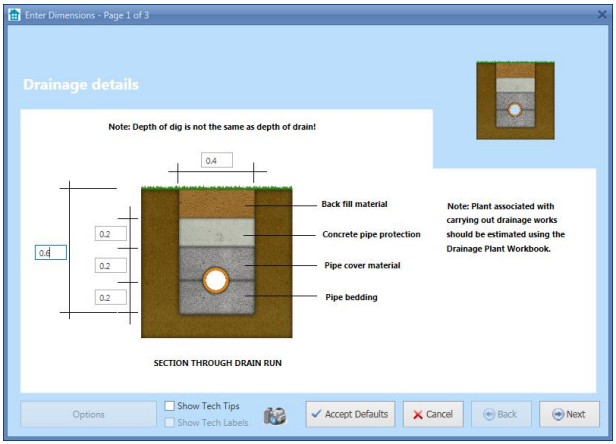
[2] Enter **Extension Drains** as a name for this **Worksheet** and then select **Extension** for location. Click **OK.**



EstimatorXpress® will then transfer you to the **Drain Runs Extension Drains Worksheet Dimensions** screen, where a dialog box will pop up asking you to select a template.

[3] Click on the **Basic Drain Run with No Fittings** template and click **Select.**

NOTE: If you want to add you own **Drain Run** template in the future, you can use the **Edit** button from this dialog box.



[4] **EstimatorXpress® Dimensions Wizard** will now automatically open up containing a diagram to assist you in entering and confirming dimensions for the **Drains.** By simply making a few changes to these dimensions, a new cost will automatically be calculated.

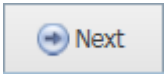
[5] Enter the **Width of Excavation** of 0.4
Press **Enter.**

[6] Enter the **Depth of Excavation** of 0.6
Press **Enter.**

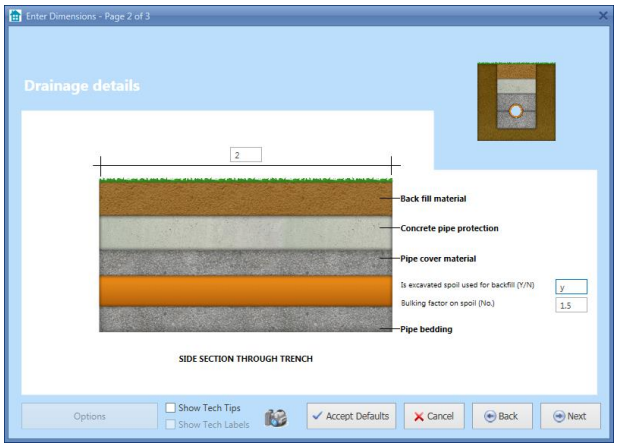
[7] Enter the **Depth of Concrete Protection** of 0.2
Press **Enter.**

[8] Enter the **Depth of Pipe Cover Material** of 0.2
Press **Enter.**

[9] Enter the **Depth of Bedding Material** of 0.2
Press **Enter.**

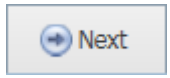


[10] When you have completed the dimensions for this page, click **Next.**



[11] Enter **Length of Drain Run** 2.000.

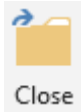
[12] Change **Is Excavated Spoil used for Backfill** to a **Y.** Leave the **Bulking Factor** as 1.5.



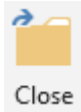
[13] Click **Next** when you have completed this page.

[14] Now add the fittings required. Change the number of 87.5 degree bends required to 1 and leave the other fittings. They are not required for this short run.

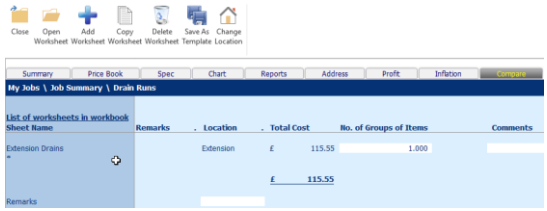
[15] Click **Finish** to return to the **Drain Runs Worksheet** screen showing all the dimensions you have just entered.

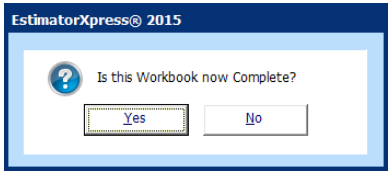


[16] Press the **Close** button to return to **Summary of Drain Runs Workbook**.



[17] Now to return back to **Job Summary**, again press the **Close** button. This will automatically save your **Drain Runs Workbook**.





[18] A dialog box pops up asking if the item (Drain Runs) is now complete. Click **Yes**.

You will now see a final estimate costing for your Drain Runs as part of the overall estimate on screen.

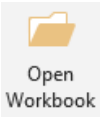
The next item to consider for the drainage is the plant.

Drainage Plant

This tutorial leads you through estimating drainage plant.

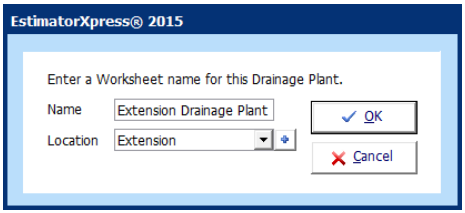
Since the **Plant** required for digging the drain run tends to spend most of its time standing idle, **EstimatorXpress®** allows you to apply your own judgment as to how long the **Plant** will be on site. For example, you may be able to excavate the drains with the digger that is already on site for the other groundworks.

The **Drainage Plant Workbook** is an example of a **Non-Specification Linked Workbook**. It is simply a collection of items of **Plant** and associated time scales that are required to construct the drains. You should review each item to see if they are required and that the quantities and prices are adequate. The **Workbook** includes **Excavator, Shovel, Wheel Barrow, Trench Compactor, Trench Sheets, Trench Props, Pipe Cutter** and **No. of Plant Deliveries.**

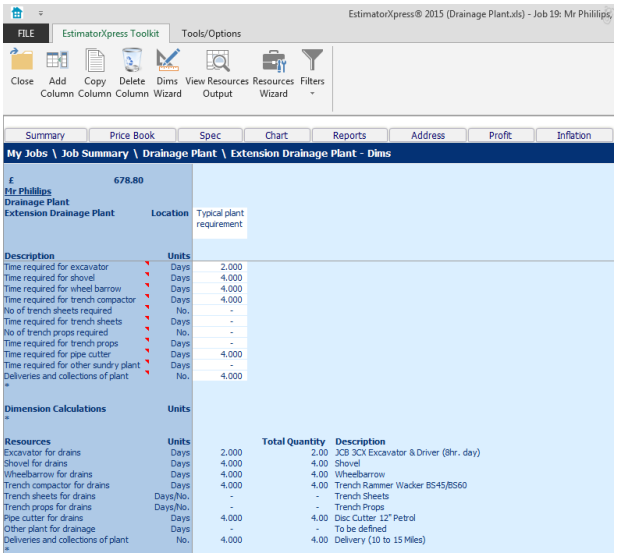


[1] To start estimating your **Drainage Plant** select the **Drainage Plant Workbook** in the **Job Summary** and press the **Open Workbook** button.

You are now transferred to **Summary of Drainage Plant Workbook**.



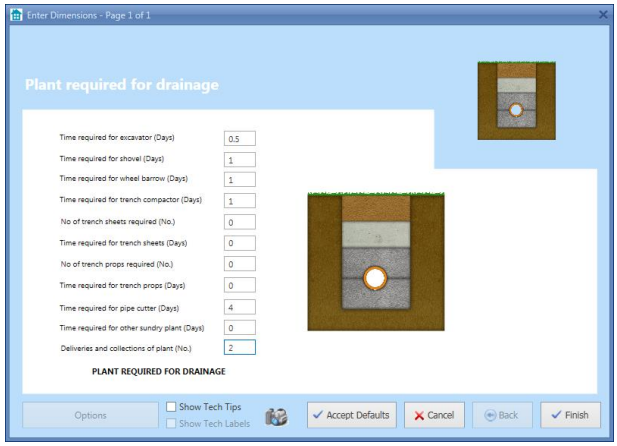
[2] A dialog box will pop up asking for a name and location for the **Drainage Plant Worksheet**. Enter **Extension Drainage Plant** or similar and select **Extension** for location. Click **OK.**



EstimatorXpress® will then transfer you to the **Drainage Plant Extension Drainage Plant Worksheet** screen, where a dialog box will pop up asking you to select a template.

[3] Click on the **Typical Plant Requirement** and press **Select.**

NOTE: If you want to add you own **Drainage Plant** template in the future, you can use the **Edit** button from this dialog box.



EstimatorXpress® Dimension Wizard will open up containing a diagram to assist you in entering and confirming the plant required for the **Drainage.**

The suggested durations for plant hire that have already been set up should speed up the estimating process although you will probably find you will not require them all for this small extension.

[4] Enter **Time required for excavator** 0.5 (days).

[5] Enter **Time required for shovel** 1 (day).

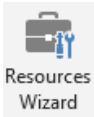
[6] Enter **Time required for wheel barrow** 1 (day).

[7] Enter **Time required for trench compactor** 1 (day).

[8] Enter **Deliveries and collections of plant** as 2.

[9] Click **Finish** to return to the **Drainage Runs Worksheet** screen showing all the values you have just modified.

At the moment the standard plant item for excavating drains is set as a JCB. You can change that to a mini-digger using the **Resources Wizard.**



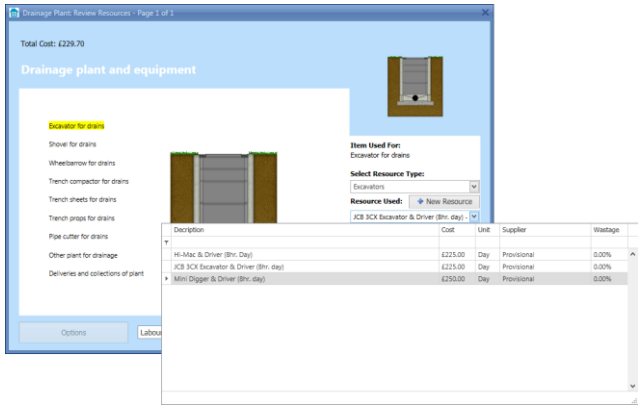
[10] Click the **Resources Wizard** button.

[11] Now change the view from **Materials** to **Labour, Plant, Subcontract & Sundry** by clicking on the drop-down menu at the bottom of the screen.

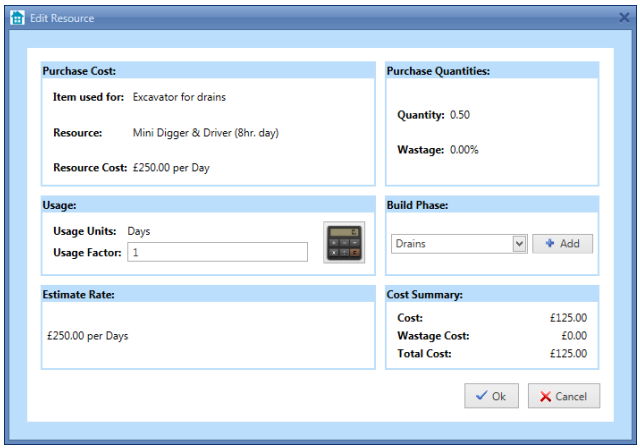
[12] Now highlight the item **Excavator for Drains** by clicking it with the mouse.

Notice that on the right hand side of the screen **Resource Used** is showing as **JCB 3CX Excavator & Driver.**

[13] Click on the **Resource Used** drop-down and select **Mini-digger & driver (8hr day)** instead.

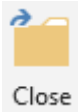


The **Edit Resource** dialog will pop up asking you to confirm that you want to use this new plant item for **Excavating Drains** and that the **Build Phase** is **Drains.**

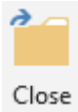


[14] Click **OK** to confirm.

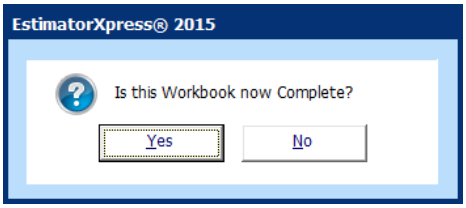
[15] Click the **Finish** button to close the **Resources Wizard** and automatically save your changes.



[16] Press the **Close** button to return to **Summary of Drainage Plant Workbook.**



[17] Press the **Close** button to return back to **Job Summary** again. This will automatically save your **Drainage Plant Workbook**.



[18] A dialog box pops up asking if the item is now complete. Click **Yes**.

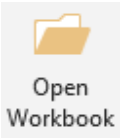
You will now see a final estimate costing for your **Drainage Plant** as part of the overall estimate on screen.

Now we just need to add a Shallow Access Manhole.

Shallow Access Manhole

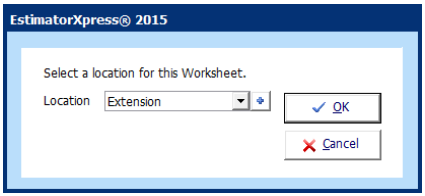
This tutorial leads you through the estimating of a shallow access manhole.

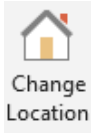
The **Shallow Access Manhole Workbook** is a **Non-Specification Linked Workbook.** It is used to calculate the depth of the manhole required as well as all the associated resources based on the dimensions you input. Plant items are added in the **Sundry Items** area because these resources are independent of the dimensions of the **Manhole**.



[1] To start estimating your **Shallow Access Manhole,** select the **Shallow Access Manhole Workbook** in the **Job Summary** and press the **Open Workbook** button.

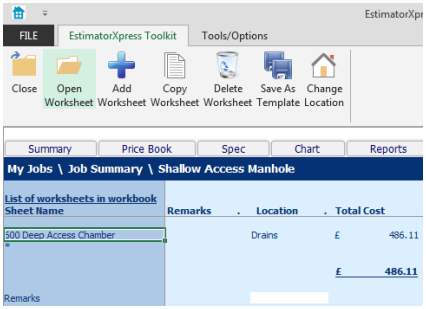
You are now transferred to **Summary of Shallow Access Manhole Workbook** where you will see there is already a **Worksheet** called **600 Deep Access Chamber.**

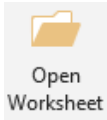




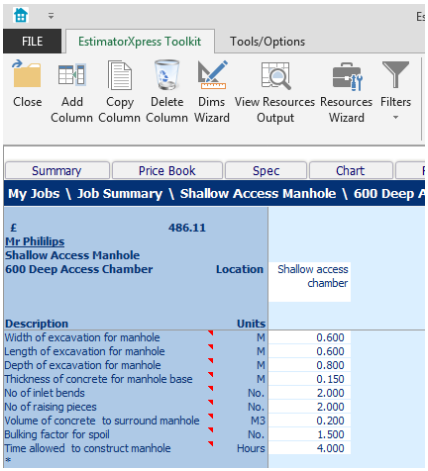
[2] Firstly, press the **Change Location** button.

[3] Change the **Location** to **Extension** and click **OK.**



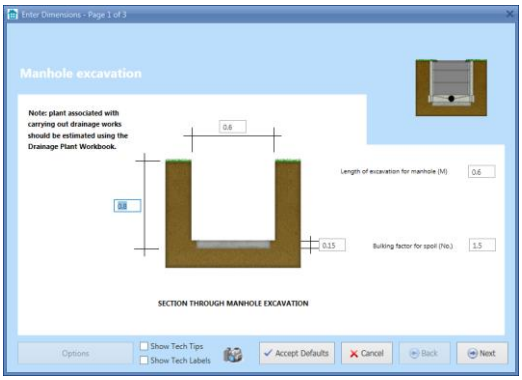


[4] Now select **600 Deep Access Chamber Worksheet** and press **Open Worksheet** button.

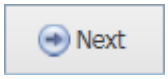


[5] **EstimatorXpress®** will then transfer you to the **Shallow Access Manhole Worksheet Dimensions** screen. There is only one Template available for estimating **Shallow Access Manholes** so **EstimatorXpress®** will automatically load the dimensions from this standard **Shallow Access Chamber** into the white column of this screen. The dimensions that have already been set up should speed up the estimating process. Because a manhole is usually a very standard size you may find you hardly have to change any of these dimensions.

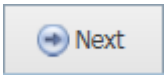
[6] To review and modify the standard dimensions, click anywhere on the white column of dimensions and press the **Dims Wizard** button.



[7] **EstimatorXpress® Dimensions Wizard** will open up a dialog box containing a diagram to assist you in entering and confirming dimensions for the **Manhole.**

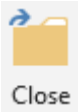


[8] The standard width, depth and concrete base should be fine so unless you want to make any changes here, just click **Next** to continue.



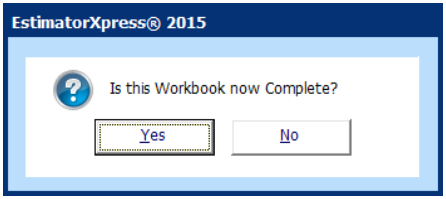
[9] Again 2 inlet bends and no raising pieces should be OK so unless you want to make any changes here, just click **Next** to continue.

[10] Finally if you are happy with the volume of concrete to the manhole surround and the suggested number of hours for constructing the manhole, just click **Finish** to return to the **Shallow Access Manhole Worksheet Dimensions** screen where the dimensions you have just seen are now confirmed in the white column.



[11] Press the **Close** button to return to **Summary of Shallow Access Manhole Workbook.**

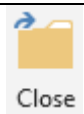
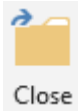
[12] To return back to **Job Summary**, press the **Close** button. This will automatically save your **Shallow Access Manhole Workbook**.



[13] A dialog box pops up asking if the item is now complete. Click **Yes**.

You will now see a final estimate costing for your Manhole as part of the overall estimate on screen.

If you wish to stop and close the current estimate:

1. Press the **Close** button on the top left of the **Job Summary** screen.	
2. You are transferred to the **My Jobs** screen. Close this screen also using **Close** button.	
3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button in the top right of screen.	

BAR CHART PLANNER

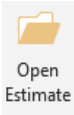
10.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed **EstimatorXpress®** follow the steps below:

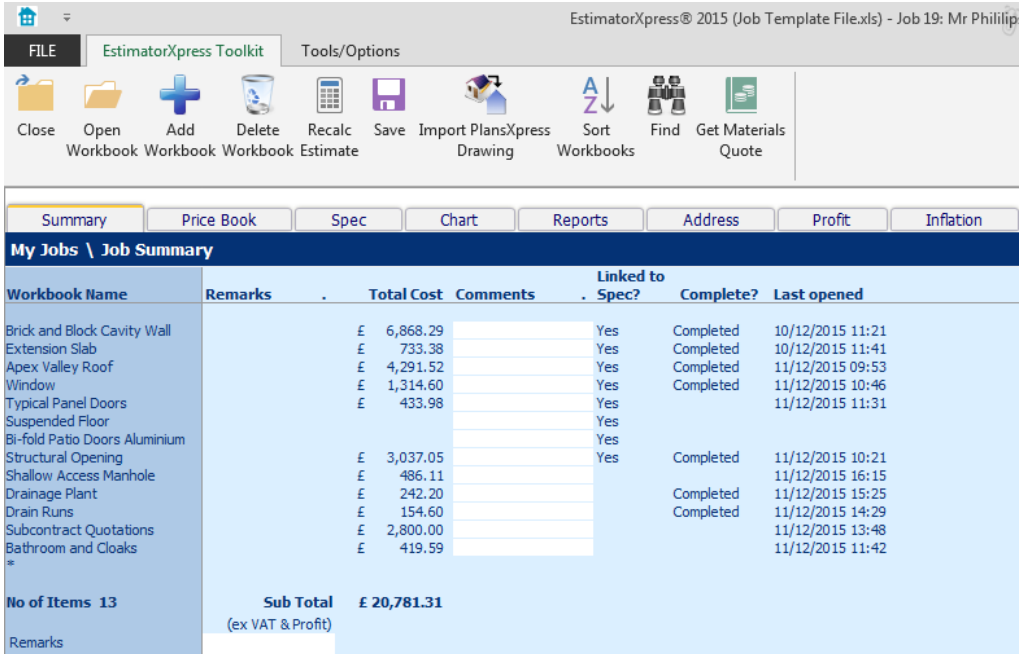
If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



You are now going to look at producing **Bar Charts** with **EstimatorXpress®** to help with the planning of your **Job**. In this example, you will schedule the activities involved in building the extension.

As mentioned earlier, the **Job Summary** screen is the control centre for your estimate and from here you can edit the planning **Bar Chart** that you selected when you created your **Job**.

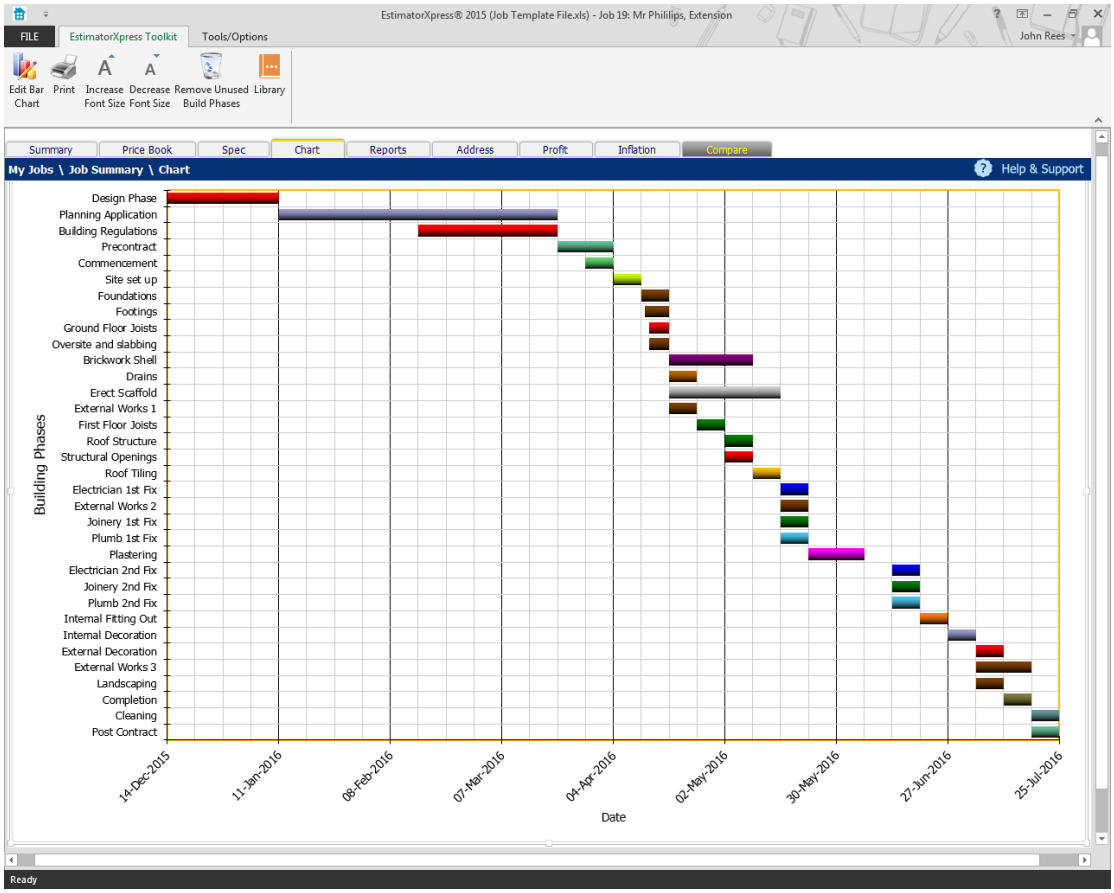


[1] To begin, click on the **Chart** tab near the top of the screen. This will transfer you to **the Bar Chart Planner** inside your **Job**.

TIP: For more information about creating and modifying Bar Charts press Help or press your F1 Key on your keyboard.

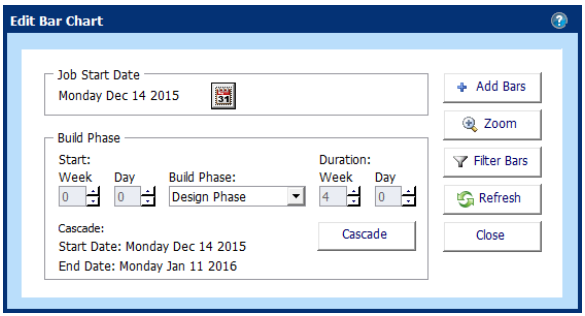
EstimatorXpress® automatically loads the **Bar Chart** for a **Large Extension** as this is what you selected when you created the **Job**. It is a template **Bar Chart** with suggested durations for this type/size of build. If you decide at any point that this chart is unsuitable for the **Job** you are estimating, you can load a different chart from the **Library of Bar Charts** using the **Library** button.

You will now see on screen a full **Bar Chart** for your extension. On the X-axis, you will see the approximate weekly durations for each phase and on the Y-axis, you will see the **Build Phases** for the extension. Notice that the start date is the start date you entered when you created your **Job**.



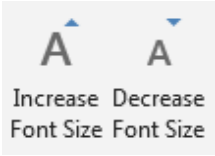
NOTE: The **Chart** shown above is an example of what a completed **Bar Chart** might look like. It may not be identical to the **Chart** you see on screen.

TIP: If the **Chart** contains **Build Phases** which are not relevant to this **Job**, you can use the **Remove Unused Build Phases** button to delete them from the chart. You will need to close the **Edit Bar Chart** tool before you so this (see next page).



[1] The **Edit Bar Chart** tool automatically pops up over the **Bar Chart.** This tool allows you to modify the Start Week and Durations of each Build Phase so that the chart is more in line with how you are going to be working. You can access this tool at any time by pressing the **Edit Bar Chart** button.

TIP: If the dialog box obstructs your view of the **Bar Chart** simply click on the bar at the top of the dialog box and with the left mouse button held down; drag the box to one side. When it is in a good position release the mouse button.

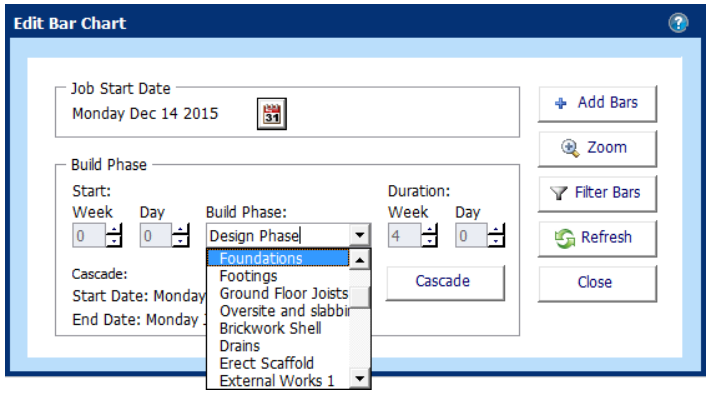


NOTE: If the Build Phase labels are too small to read simply press **Increase Font Size** button to increase the font. Use **Decrease Font Size** button to decrease the font size if it is too big. You will need to close the **Edit Bar Chart** tool in order to do this.

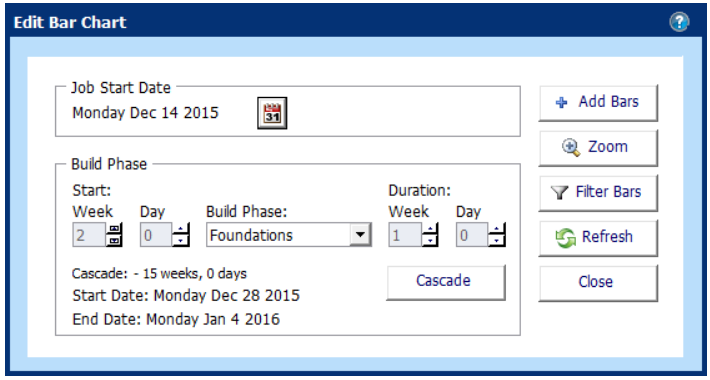
(With some PCs, Excel automatically hides some of the labels for clarity. Normally however these missing labels will be printed depending on your printer resolution. To check any individual bar description or duration, mouse-over the bar, **EstimatorXpress®** will then show the name and duration of the phase in days.)

[2] To change the start date of the **Foundations,** select it with the drop down box in the centre of the dialog box.

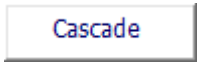
Currently the start date for **Foundations** is set at week 17 to allow for the phases you have excluded this time.



[3] To move this phase to week 2, for example, click on the Down Arrow of the Start Week in the dialog box.



[4] You will see on the **Bar Chart** on screen that the **Foundations Phase** has been moved to week 2.



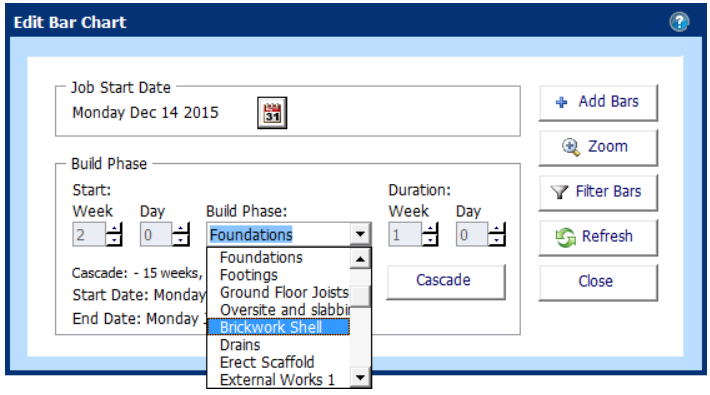
[5] To move all the **Build Phases** after **Foundations** forward by the same duration, press the **Cascade** button.

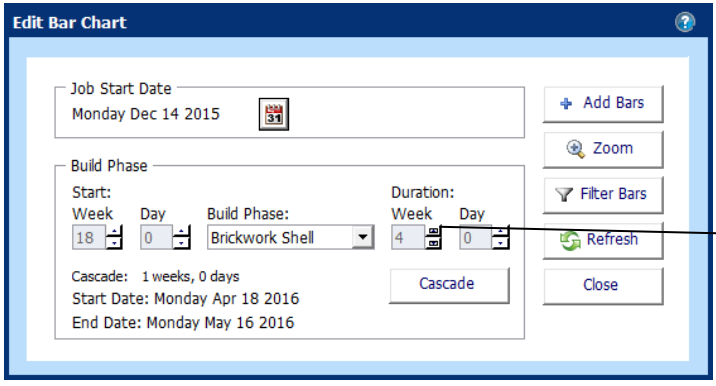
You will see that all the **Build Phases** following **Foundations** have been brought forward by the same number of weeks.

[6] In the next example, you will increase the duration of a **Build Phase.** First, you must select the phase with the drop down box in the centre of the dialog box.

[7] Scroll down until you find **Brickwork Shell.**

[8] Select **Brickwork Shell** using the mouse.





Currently the duration for **Brickwork Shell** is set at three weeks.

[9] To increase its duration to four weeks click on the Up Arrow of the duration in the dialog box. You can change the duration in weeks and days if you wish.

You will see on the **Bar Chart** on screen that the length of the **Brick Work shell** has increased by one week.

[10] To nudge all the **Build Phases** after **Brickwork** to match the increased duration of the **Brickwork**, (assuming that the next phases cannot occur without the completion of **Brickwork shell**) click the **Cascade** button.

You will see that all the **Build Phases** after **Brickwork shell** are moved back one week. Check the values of each subsequent bar to confirm that you are happy with the result.

[11] When you have finished modifying the chart, click the **Refresh** button to ensure all phases of your chart are on screen.

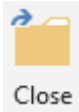
[12] When finished click the **Close** button on dialog box.

[13] To print the chart, click the **Print** button on the top toolbar.

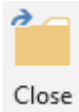
[14] To exit the **Job Bar Chart** screen to return to the **Job Summary**, click on the **Summary** tab.

If you wish to stop and close what you have estimated and planned so far:

1. Press the **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs**. Close this screen also using the **Close** button.



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

REPORT MANAGER

15.00 Minutes

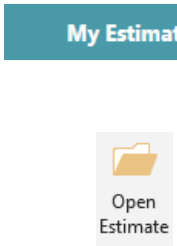
You are now going to look at producing **Reports** with the **EstimatorXpress® Report Manager** to help with the costing, quoting, planning and management of your **Job**.

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

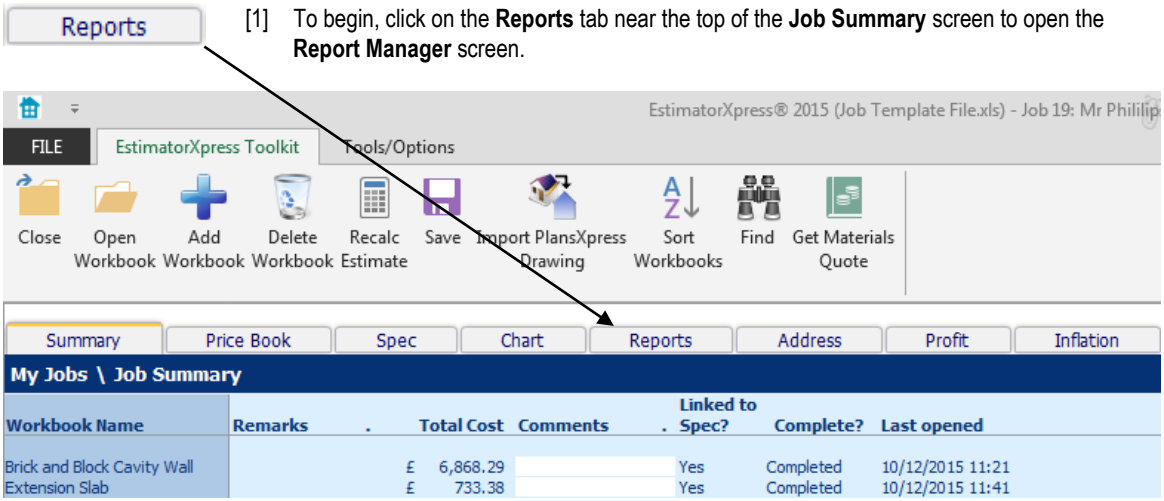
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

If you wish to start this tutorial having closed EstimatorXpress®:

1. Press the **My Estimates** button at the top of the **Main Menu** screen.
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.



As mentioned earlier, the **Job Summary** screen is the control centre for your estimate and from here you can view and modify **Reports** for your **Job** - in this example for the extension demonstration.



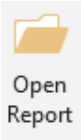
[1] To begin, click on the **Reports** tab near the top of the **Job Summary** screen to open the **Report Manager** screen.

You are transferred to the **Reports Manager**.

On the left of the screen, you will see all of the Reports that are automatically created for your estimate.

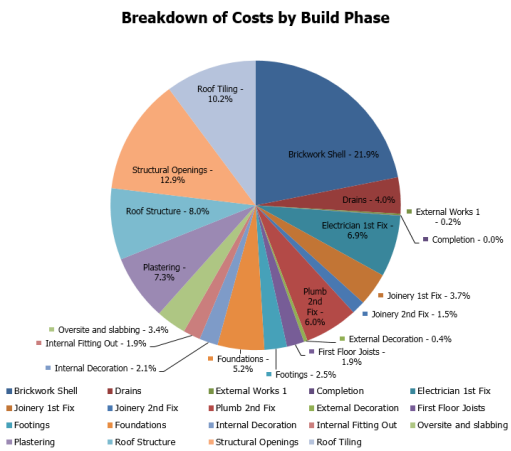
PLEASE NOTE: If you are using **EstimatorXpress®** Total Toolkit you will see over 50 **Reports** available for you to view and print to review the output of your estimate including over 20 charts showing graphical breakdowns of profit, cost, price and cashflow by **Workbook**, **Build Phase**, **Resource Type** and **Trade** (marked by a pie chart symbol) and over 20 tabular **Reports** including **Sales Price inc. Profit**, **Materials Task List**, **Basic Costs, Inflated Costs** and many more (marked by a document symbol) that can be viewed and modified to show as much or as little detail as you require. If you are using **EstimatorXpress®** Lite, you will see a restricted set of these reports and should therefore proceed to step [10] below.

If you are using **EstimatorXpress®** Total Toolkit you will also have access to the **Accounts Export** function and the **Variations** function which allows you to view, amend and resave previously printed **Customer Quotes**. To open and make changes to previous **Quotes**, use the **Previous Quotes** button.



[2] Select the Chart Report called **Cost by Build Phase** and click **Open Report** button.

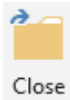
The **Chart Report** called **Cost by Build Phase** opens showing the breakdown of cost for each build phase as a percentage of the total cost of the **Job**.



[3] To see this information in monetary terms, click the **Toggle** button on the toolbar.

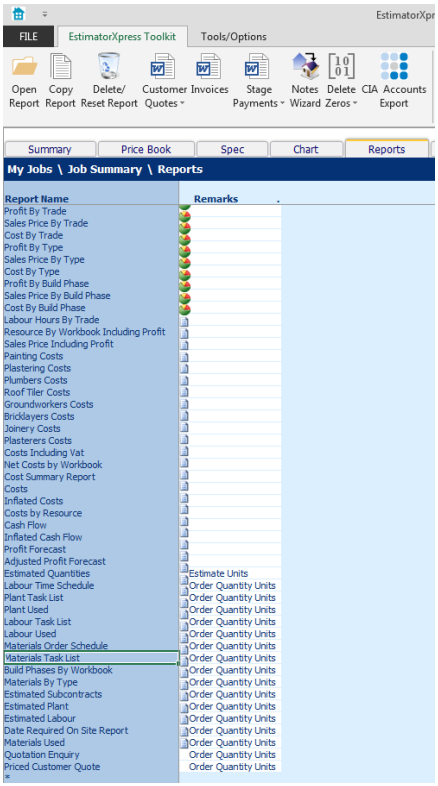
The **Chart Report** will now display the breakdown in pounds excluding VAT, profit and inflation.

[4] To print this **Report,** click the **Print** button on the toolbar.



[5] Click the **Close** button to return to the **Report Manager** screen.

Have a look at any of the other **Chart Reports** available before moving on to the next step.



[6] Scroll down the screen to find the **Materials Task List Report.**

[7] Click on the Report and press **Open Report** button.

[8] You will now see all of the materials required to build the extension that you have estimated alongside the quantity needed inclusive of wastage, costs and their Order by Date.

					Data					
Order By	Date required	Description	Purch Cost (£)	Purchase Units	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13-Apr-09	08-Jun-09	Cavity Closer 100mm x 3m	£ 30.00	EA	2.00	0.20	2.20	£60.00	£6.00	£66.00
		Insulation Block Standard 440 x 215 x 100mm	£ 12.00	M2	43.08	4.31	47.39	£516.96	£51.70	£568.66
20-Apr-09	01-Jun-09	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80)	£ 80.00	M3	2.16	0.22	2.38	£172.80	£17.28	£190.08
22-Apr-09	03-Jun-09	Flooring Grade Polystyrene Insulation Sheet 2400 x 1200 x 100mm	£ 40.00	SH	2.60	0.26	2.86	£103.82	£10.38	£114.20
27-Apr-09	08-Jun-09	Cavity Tray Gable Abutment	£ 7.50	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Not required	£ -	Unit	6.00	0.00	6.00	£0.00	£0.00	£0.00
		Plastic to Clay Pipe Adapter 110mm	£ 15.00	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Prestressed Concrete Lintel 65 x 100 x 1050mm	£ 6.80	EA	2.00	0.20	2.20	£13.60	£1.36	£14.96
		To be defined	£ -	Unit	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Universal M/H Access Chamber Raising Piece 150mm	£ 26.00	EA	2.00	0.20	2.20	£52.00	£5.20	£57.20
		Universal M/H Polymer Cover & Frame 345x345mm	£ 62.00	EA	1.00	0.10	1.10	£62.00	£6.20	£68.20
11-May-09	08-Jun-09	Brickwork Tie DD140 Type 4 225mm	£ 0.20	EA	141.39	14.14	155.53	£28.28	£2.83	£31.11
	22-Jun-09	Round Wire Nails Bright 100mm x 25kg	£ 38.00	BX	0.13	0.01	0.14	£4.83	£0.48	£5.32
18-May-09	08-Jun-09	Universal M/H Access Chamber Base Unit 215x100mm	£ 62.00	EA	1.00	0.10	1.10	£62.00	£6.20	£68.20
	29-Jun-09	Clout Nails Galvanised 65mm x 25kg (plating)	£ 54.00	BX	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Half Round Downpipe Saddle Bracket 68mm	£ 1.80	EA	10.00	0.50	10.50	£18.00	£0.90	£18.90
		Natural Slate 400 x 250mm (Each) (Allowance £1.50)	£ 1.50	EA	4.00	0.30	4.30	£6.00	£0.45	£6.45
		Round Wire Nails Bright 100mm x 25kg	£ 38.00	BX	0.25	0.02	0.27	£9.45	£0.94	£10.39
		RSJ 178 x 102 x 19 kg per m	£ 35.00	MT	6.00	0.30	6.30	£210.00	£10.50	£220.50
		Sawn Dry Graded Structural Softwood Treated 47.0 x 125mm	£ 3.80	MT	19.44	1.46	20.90	£73.88	£5.54	£79.43
		Sawn Dry Graded Structural Softwood Treated 47.0 x 150mm	£ 3.70	MT	82.25	6.17	88.42	£304.32	£22.82	£327.15
		Sawn Dry Graded Structural Softwood Treated 47.0 x 175mm	£ 5.30	MT	5.40	0.41	5.81	£28.62	£2.15	£30.77
19-May-09	02-Jun-09	Blue Circle Mastercrete Original Cement 25kg Bag	£ 5.30	EA	2.57	0.26	2.82	£13.60	£1.36	£14.96
		Building Sand Bulk Bag	£ 40.00	EA	0.22	0.02	0.25	£8.95	£0.90	£9.85
		Engineering Brick - Class A Blue 65mm	£ 0.70	EA	81.00	8.10	89.10	£56.70	£5.67	£62.37
		Facing Bricks - Provisional (Allowance £0.40 each)	£ 0.40	Each	40.50	4.05	44.55	£16.20	£1.62	£17.82
		R'mix Concrete GEN 1, 125mm slump 2-3 m3 (Allowance £85)	£ 85.00	M3	0.20	0.02	0.22	£17.21	£1.72	£18.93
		Solid Dense Concrete Block 7N 440 x 215 x 100mm	£ 9.00	M2	6.08	0.61	6.68	£54.68	£5.47	£60.14
		Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	£ 0.60	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Trench Block 440 x 215 x 275mm	£ 40.00	M2	2.03	0.20	2.23	£81.00	£8.10	£89.10

NOTE: To see all data either scroll using scroll bars or use the **View** menu on the menu bar to change the **Zoom** setting. It is normally set at 85% but if you set it to a lower number, more data will fit on your screen.

If you ma
anywher

[9]

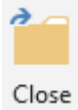
For more information about changing the appearance of Reports press Help or press your F1 Key on your keyboard

When finished press the **Close** button to return to **Reports Manager** screen.

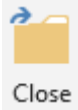
[10]

If you wish to stop and close what you have estimated and planned so far:

4. Press the **Close** button on the top left of the **Job Summary** screen.



5. You are transferred to the **My Jobs**. Close this screen also using the **Close** button.

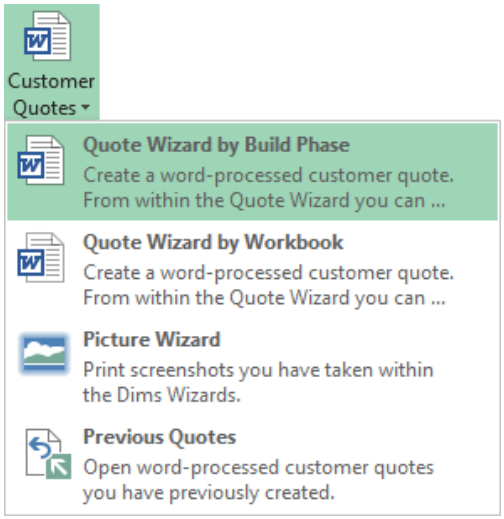


6. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button on the top right of screen.

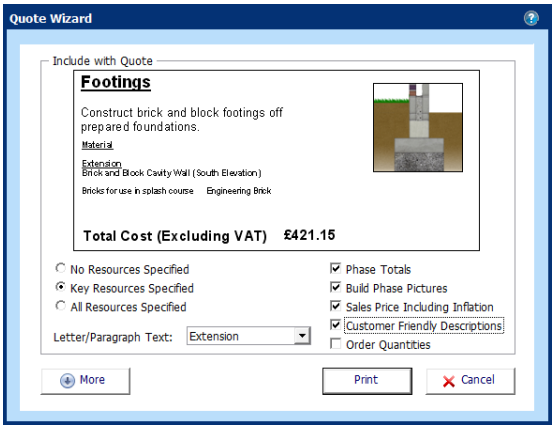
PRINTING OUT A CUSTOMER QUOTATION IN MICROSOFT WORD®

15.00 Minutes

NOTE: You must have Microsoft Word installed on your PC, for this feature to function.



[1] From the **Reports** tab, click on **Customer Quotes** button and select **Quote Wizard by Build Phase**. The **Quote Wizard** dialog will pop up.



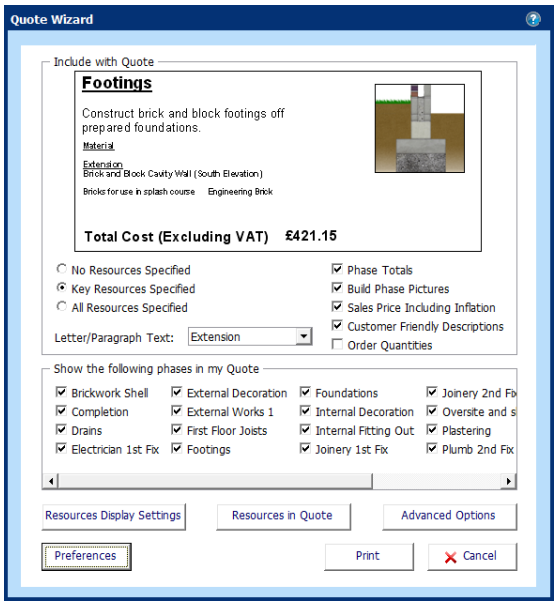
[2] You can choose what level of information you wish to include in your **Quote** by checking any of the following options:

No Resources Specified
Key Resources Specified
All Resources Specified
Phase Totals
Build Phase Pictures
Sales Price inc. Inflation

If you select **Key Resources** or **All Resources Specified** you can then also choose whether you wish the following items to be included in your **Quote:**

Customer Friendly Descriptions
Order Quantities

As you check and uncheck the various options, the sample text relating to **Footings** displayed in the dialog box will change to give you an idea of how the text might look in your finished **Quote.**

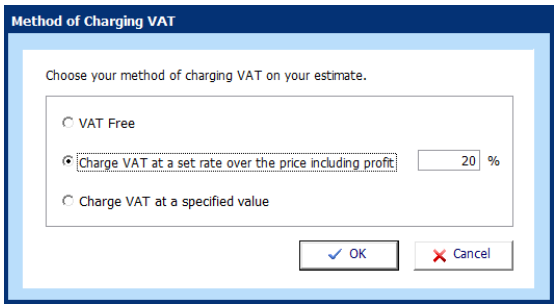


[3] Click on the **More** button to see which **Build Phases** are to be automatically included in the **Quote**. You may wish to uncheck any of them in order to exclude them.

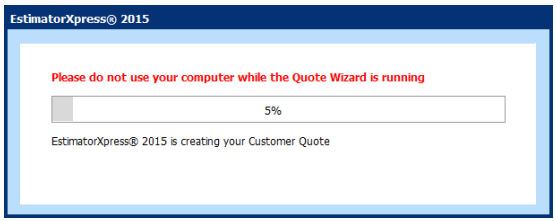
NOTE: The **Advanced Options** button allows you to change what materials are explicitly mentioned in the quote for each individual **Build Phase** e.g. you may wish to exclude screws and fixings from the phase **First Floor Joists** but you would want to include the **Carcassing Timber.**

We recommend you print your **Quote** with the default settings initially and then experiment with them later.

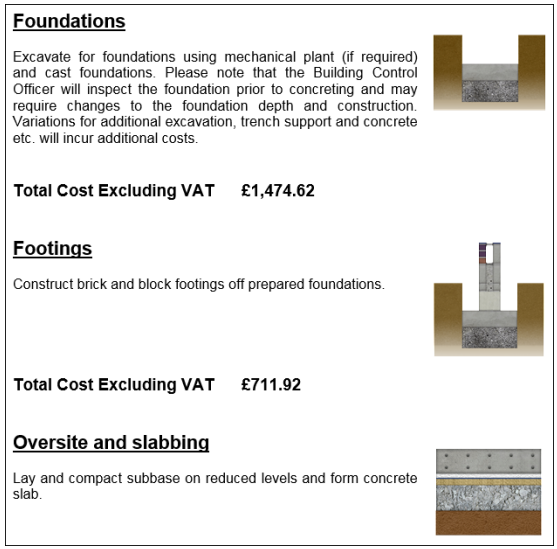
[4] Click **Print** to generate your **Quote** in Microsoft Word.



[5] A dialog box will pop up asking if you wish to include VAT. Enter the rate of VAT you wish to include and click **OK.**



The process of creating your **Quote** may take a few moments as **EstimatorXpress®** has to transfer all the data from your estimate into Microsoft Word. A progress bar will appear to show you how much more the **Quote Wizard** has to do before the **Quote** is ready.



Foundations

Excavate for foundations using mechanical plant (if required) and cast foundations. Please note that the Building Control Officer will inspect the foundation prior to concreting and may require changes to the foundation depth and construction. Variations for additional excavation, trench support and concrete etc. will incur additional costs.

Total Cost Excluding VAT £1,474.62

Footings

Construct brick and block footings off prepared foundations.

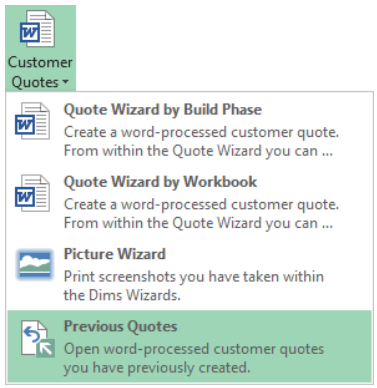
Total Cost Excluding VAT £711.92

Oversite and slabbing

Lay and compact subbase on reduced levels and form concrete slab.

[6] Microsoft Word will automatically open and load your **Customer Quotation** which you can now edit, save and print as you would any other Word document.

NOTE: **Quotes** are stored in the estimate folder and can be re-opened by using the **Previous Quotes** button from the **Customer Quotes** drop-down menu.



[7] Click on **EstimatorXpress®** in your Windows taskbar to return to the software.

[8] To return to the **Job Summary** screen, click on the **Summary** tab.

You are returned to the **Job Summary** screen.

NOTE: You can also click on **Quote Wizard by Workbook** and follow a similiar process to create a quote that is broken-down by Workbook rather than Build Phase.

TIP: In future, you may also want to review some of the **Preferences** for your printed quotation.

From the **Quote Wizard** dialog box, press **Preferences** button.

The **Preferences** dialog box will appear. From here you can modify the standard paragraphs of text that will appear in your quote including:

Opening Paragraph
Closing Paragraph
Build Phase Description

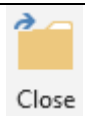
Plus you can use the **Page Setup** button to tell **EstimatorXpress®** that you want to use your own headed paper or you import your company logo.

You may also want to review **Resource Descriptions.** For example you may not want the Brick Ties to appear in the **Customer Quotation** as "ANSON Stayfix Housing Tie to DD140 Type 4 200mm HRT4200" so you can tell the software to simply substitute **Brick Ties**.

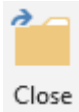
To view product descriptions that may required editing and to give them your choice of name, click the **Non-edited** button.

A dialog contained all full length product descriptions used in your estimate will appear. Click on the product you wish to change and type in a new name. This name will be remembered for future **Quotes.**

1. To close your completed **Job,** press **Close** button on the top left of the **Job Summary** screen.



2. You are transferred to the **My Jobs**. Close this screen also using **Close** button



3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press **Exit** button at the top right of screen.

Congratulations on working all the way through the Tutorial! You should now have a good grasp of how **EstimatorXpress®** works. Remember you can refer to the Help system at any time, accessed by clicking the Help button or pressing F1 on your keyboard will provides more details of each screen.

GLOSSARY

Accounts Export
Use this button to export data to QuickBooks® and Builder Books® software packages if you are using **Total Toolkit** edition.

Adjustment (Within Price Book)
This is a percentage you may apply to the list price of a resource in the **Price Book** to increase/decrease the price.

Area Estimator
See **Workbook** (Area/Volume/Perimeter)

Bar Chart
This is a visual planning chart that **EstimatorXpress®** produces in the **Bar Chart Planner**.

Build Phase
Build Phases are an important component within the structure of **EstimatorXpress®**, allowing you to manipulate the output in the Report Manager to organise Material deliveries and cashflows etc. Each Estimate is divided into the various phases of work, for example: Brickwork shell, First Fix or Roof Structure. Every item in an Estimate is assigned to a Build Phase to allow you to group together all items required in a particular Build Phase, for example you can group together all materials required to construct the roof structure, by applying the “Roof Structure” filter in the Report Manager. You define the start dates of each Build Phase in the Bar Chart.

Button Bar (With Reports)
These are horizontal grey bars, which appear in opened Reports and allow you to modify the Report by dragging the bar to different parts of the screen.

Cell
The Screen is divided into a number of rectangular areas called “cells”. Coloured cells are “Locked” and cannot be edited. White cells are can be edited by moving the cursor into the cell and editing.

Code
This is the manufacturer’s code for the described Resource.

Completed (Within Job Summary)
Defines whether you regard the estimating in a **Workbook** as having been completed. (Each time you close a **Workbook** you are asked whether the **Workbook** has been completed, and the **Job Summary** marked accordingly).

Composite Items Estimator
See **Workbook** (Composite)

Copy
This is the function, which allows you to create a duplicate of an existing item having selected it with your mouse, for example, a **Price Book**, **Worksheet** or **Column**.

Critical
Critical indicates an item, which you consider to be critical and worthy of close attention during estimating. For example, the cost of nails may not be particularly important but the cost of bricks will probably be regarded as critical.

Cursor
The small marker on the screen (often in the shape of a white arrow or white cross) that follows the movement of the mouse and indicates which area of the screen will be affected when you press the mouse button. The cursor changes shape during certain tasks.

Desktop
This is the main area of Windows where you can open and manage files. When **EstimatorXpress®** is properly installed, a **EstimatorXpress®** icon should appear on your desktop.

Dialog Box
A Dialog Box is a box of information, which "pops up" when various commands have been initiated by you using the various buttons on the Screen. Normally your will be expected to enter information or use the select arrow to choose information in the pull down box on the Dialog Box. Once the information has been entered or selected, press the OK or Cancel button to clear the Dialog Box. While the Dialog Box is on the Screen, no other button pressing or editing can occur.

Dimensions Section
This is the section of a **Worksheet** where you may add the dimensions of your building works, (provided you have selected a column from the Library of Templates). Once you have opened a work sheet, within a **Workbook**, press the dimension arrow button to access this area of the screen.

Discount (Within Price Book)
This is a percentage applied to the list price of a resource in the **Price Book** to decrease its Purchase Cost.

Double Click
Double Clicking accesses some commands without pressing a specific button. The Double Clicking command is assigned to various functions throughout **EstimatorXpress®** and changes as you move through the various Screens e.g. **Open Workbook.** The special Double Clicking function only functions on coloured, locked areas of the screen. In addition to the special functions, Double Clicking will allow you to edit text within cells, which are not locked.

Drag
To drag an item first select it with your mouse, next hold the left-hand mouse button down and, with the mouse button still pressed, move the pointer to the desired position, the selected item will then have been "dragged". To drag over some text, select an item of text. Hold the left-hand mouse button down and, with the mouse button still pressed, move the pointer over the desired text. The selected text will change colour, indicating that it has been selected. Release the mouse button once the text has been selected.

Drop Down Box
This is a box in which you select an item by clicking on the small down arrow, this opens your options and allows selection of the item with the mouse. You may also have to use the scroll bar on the drop down box to find the item you require.

Duration Days (Within Bar Chart)
This is the number of days that you anticipate each phase will take to complete and is calculated by **EstimatorXpress®** from the Duration (Weeks) entry.

Duration Weeks (Within Bar Chart)
This is the number of weeks that you anticipate each phase will take to complete.

Estimate
This is any complete house/extension/garage/extension/office…

Estimate Rate
Estimate Rate is the cost per usage unit. For example, blocks are laid at £5 per m^2. (£5 is the Estimate rate). The Estimate rate is obtained by Multiplying the Production/ Usage Factor x Purchase Cost.

Export
Exporting allows the user to transfer any screen information into a new standard Microsoft Excel file, which can then be opened in Microsoft Excel™. All information is transferred in value or text form without any underlying formulas. All exported sheets are stored in the C:\Program Files\HBXL\EstimatorXpress\Exports folder where C:\Program Files\HBXL\EstimatorXpress is the location where **EstimatorXpress®** was installed.

Icon
This is a small picture, which represents something that you can manipulate, such as a folder or a document. When **EstimatorXpress®** is properly installed, a **EstimatorXpress®** icon should appear on your desktop.

Item Used For
Item Used For describes the usage of a Resource. E.g. Solid concrete blocks are used below dpc in cavity walls

Job Description
This is the description of the **Job** and is added by you when the **Job** is first created.

Job No.
This is the number automatically created by **EstimatorXpress®** when an estimate is created and ensures that each estimate has a unique reference.

Job Reference
Job Reference is the name provided for the **Estimate** or **Job** (created by the user) combined with the Job No. (Provided automatically by **EstimatorXpress®**).

Job Summary
When you create a new Estimate, **EstimatorXpress®** creates a summary of the elements (**Workbooks**) that the estimate contains and presents this information in the **Job Summary** Screen. The **Job Summary** allows you to view the progress of your estimate and provides access to the Profit Margin, Inflation, Bar Chart and Address Screens for the **Job** in hand.

Job Value
This is the overall cost of the estimate shown in the **My Jobs** and **Job Summary**. (Excluding Profit).

Group Of Workbooks
A Group of **Workbooks** is a list of **Workbooks** grouped together to allow the user to easily select a "check list" of items required in a particular type of **Job** and so speeds up the estimating process. For example, a simple extension estimate **Group Of Workbooks** could include…

Drain Runs **Workbook**, Manholes and Drainage Plant **Workbook**, Cavity Wall Estimator **Workbook**, Block Wall Estimator **Workbook**, Structural opening Estimator **Workbook**, Lean to roof Estimator, House Slab **Workbook**, Perimeter Insulation **Workbook**, Patio Door 2400 **Workbook**, Window Estimator **Workbook**.

The user can create their own **Group Of Workbooks** to reflect the different types of work they carry out. During the estimating process users may also add additional **Workbooks** to the selected **Group Of Workbooks** within the **Job Summary**.

Locations
Locations references are used to sort Reports by the position of the element within the Estimate. For example: Dining Room, Garage etc. **EstimatorXpress®** uses locations references for sorting Reports. For example if you had estimated an extension, it would be possible to create a Report, which "picks out" only those **Worksheets** and associated resources, which relate to the Dining Room.

Locked Cells
In most windows the Screen is divided into two distinct areas:
Coloured areas: These areas are locked and cannot be edited or typed into by the user.
White areas: The areas are unlocked and can be edited or typed into by the user.
NOTE that in Report Screens the usual Rules relating to Coloured and White Screen Areas do not apply.

Main Menu
This is the first screen that opens once **EstimatorXpress®** is fully installed.

Master
When the label "Master" appears on any summary/library screen, this indicates that the item cannot be modified. You can however copy items marked Master and then modify them.

My Jobs
This is the screen where your estimates are listed. You can open your Estimates or create new Estimates from this screen. This screen is accessed from the **Main Menu** by pressing **My Estimates** button.

Notice or Delivery (Within the Price Book)
Indicates the number of week's notice or lead-time that is required to ensure that a particular Resource is available on site.

Payment Terms
Payment Terms is the number of weeks allowed by the supplier before payment is due on items supplied or delivered to site on each Resource. The Payment Terms are defined in the **Price Book** when each Resource is created or edited.

Price Book
This is a list of Resources which you have available to cost your Estimate. The Resources are split within the **Price Book** into 5 different sections. You may create your own resources or modify details of ones that already exist in **EstimatorXpress®**.

Production/Usage Factor
See Usage Factor

Profit Margin
Profit margin percentages are initially set "globally" for all new estimates by the user from the **My Settings Menu**. The user can then modify the margins on a **Job**-by-**Job** basis from the **Job Summary**. NOTE that the Profit Margins are added to each item in the Estimate in the Report Manager only. The calculated costs, which appear in the **Workbooks** and **Job Summary**, are the raw costs exclusive of any profits.

Project
A Project is a group of **Estimates**, which are grouped together to give an overall view of a site or an overall view of workload in the Project Manager. (See Project Manager)

Project Description
This is simply a label given to a particular Project for identification purposes by you. **EstimatorXpress®** does not use it for sorting.

Project Manager
This allows you to merge selected **Jobs** that you have previously estimated with the **EstimatorXpress®** into overall **Bar Charts** and **Reports**. The Project Manager accumulates all estimated costs and the materials, plant, labour required as well as overall cash flow for the selected **Jobs** and projected profit. The **Project Manager** produces the same **Reports** as the **Report** Manager but for several **Jobs** grouped together rather than an individual **Job**. This feature is only available with Total Toolkit edition.

Project Number
Project Number is the number automatically created by **EstimatorXpress®** and ensures that each Project has a unique reference.

Purchase Cost
Purchase Cost is the purchase cost from the supplier per unit of supply of the Resource, which is defined in the **Price Book** when each Resource is created or edited.

Purchase Unit
This is the "unit of supply" of the Resource that is defined in the **Price Book** when each Resource is created or edited. (E.g. Tins, Bags, Each etc.)

Quick Keys
In some cases where Quick keys have been assigned to a button, a message on the Status Bar or Tool tip will indicate the Quick key command. For example: Print- (Ctrl P). This indicates that the command button may be selected from the keyboard rather than the mouse by pressing the Control Key together with the appropriate letter.

Quote Wizard
Use the **Quote Wizard** from the **Reports Manager** screen to create **Customer Quotations** in Microsoft Word.

Report Manager
This combines the previously created Estimate and Bar Chart to produce Reports such as Material Schedules, Cash Flow, Overall Job Costs and Profit Forecast.

Resource
Resources are Labour, Materials, Plant, Subcontractor and Sundry Items. **EstimatorXpress®** uses resource references for sorting Reports and in the **Price Book**. This enables the user to produce a Report, which for example details all the Materials costs for a Project. You cannot create additional Resource *categories*, but are able to create additional Resources in the **Price Book** either from the **Main Menu** or during the course of an Estimate.

Resources Section
This is the section of a **Worksheet** where all the materials, plant and labour for a part element of a build are listed. For example, the resources section of a Cavity Wall **Worksheet** would include bricks, brick ties, cement and bricklayers.

Row
A horizontal collection of cells/information on screen.

Screen Shot
A picture showing all or part of the computer screen.

Scroll Bars
Scroll Bars are located at the bottom and side of each Screen and allow you to move the viewed area of the Screen. To use the Scroll Bar place the arrow on the scroll bar button and drag the button to move the Screen. Alternatively, click either side of the button or click on the arrows at the top and bottom of the scroll bar.

Sheet Name
This is the name of the **Worksheet** and is created by you or provided when the original **Workbook** was created.

Sort
This allows you to arrange data alphanumerically in A-Z order, date order, Build Phase order and others using specific sorting buttons.

Specification
The **Specification** defines the materials that make up the main fabric of a particular type of house. For example, the type of bricks, the type of roof tiles and the typical joist sizes.

Status Bar
The Status Bar appears at the bottom of the Screen and is used to display information about what **EstimatorXpress®** is doing during automatic routines.

Sundry Item
Diverse items required to build a house/ extension…that are not specifically related to the dimensions input into an estimate **Workbook**.

Sundry Items Area
The area in which you add sundry items to your estimate in a **Workbook**. The items are always unrelated to any automatic calculations carried out by **EstimatorXpress®**.

Suppliers
The organisation/ persons who provide you with your materials/plant/labour/subcontract.

Toolbar
A series of shortcut buttons that provide quick access to commands. Usually situated at the top and bottom of the screen.

Tool Tip
This is a Help feature that displays the function of a button when you move your cursor over a button.

Total Cost (Job Summary)
This is the estimated finished cost of a particular **Workbook** (Excluding Profit).

Total Order Quantity
This is the total order required, expressed in purchase units, as distinct from usage units.

Type
Type is a category, which is defined to enable you to sort similar items into groups. You may use the predefined types or create your own using the button on the **Main Menu**. (Opportunities to create new types and other sort references also occur in many Dialog Boxes). For example, the Type “Carcassing timber” includes all the various types of sawn timber.

Unit of Supply
These are the units that the supplier chooses to supply his Resource in. (NOTE that once a resource has been created the Units of Supply cannot be changed. If you wish to source the resource in different Units of Supply, you must create a new resource. This is to guard against the problem of the user modifying the units whilst considering one **Specification** or **Workbook** and taking into account that it may well affect other **Specification**s or **Workbooks**).

Unlocked
In most windows the Screen is divided into two distinct areas:
Coloured areas: These areas are locked and cannot be edited or typed into by you.
White areas: The areas are unlocked and can be edited or typed into by you.
NOTE that in Report Screens the usual Rules relating to Coloured and White Screen Areas do not apply.

Usage Factor
Production / Usage Factor is the factor which is applied to the purchase cost to convert the purchase cost to the "Estimate Rate". For example if the Bricklayer paid £8.00 per hour and the Estimate Rate for bedding a coping is £2.00, then the usage factor would be 0.25. Thus Cost for bedding the coping is £8.00 * 0.25 = £2.00.

Usage Factor Calculator
When you are editing resources in a **Worksheet** or **Specification**, the **Usage Factor Calculator** can help you work out the correct **Usage Factor** to input.

Usage Units
These are the units that you actually use a resource in. For example, paint will be purchased in "purchase units" of 5 litre tins, but will be used to paint areas in m^2, which is the "usage unit".

Variations
If you are using Total Toolkit edition, it is possible to create and save **Variations** to previously created **Customer Quotes.**

VAT Codes
VAT % is the rate of VAT defined by you when the Resource was created or modified by the user in **Price Book**.

Wastage Cost
This is the cost of the Wastage based on the Wastage Factor defined in the **Price Book**.

Wastage Factor
This is the wastage allowance (percentage) on each Resource that is defined in the **Price Book** when each Resource is created or edited.

Workbook
Within each Estimate, you must select the elements of work or **Workbooks** that you need to estimate. For example, there will be a **Workbook** for Cavity Walls, Block Walls, Roofs and Bathrooms… An estimate will therefore contain numerous **Workbooks**. Each **Workbook** can also contain several **Worksheets**.

Workbook (Area/Volume/Linear)
The **Area, Perimeter** and **Volume Workbooks**, are used to estimate quantities and list resources for elements of the build which have **not** been defined in the **Specification**. (Note that the items defined in the **Specification** deal with the main fabric of the house such as the walls, roofs, studding etc).The **Area, Perimeter** and **Volume Workbooks**, are similar to the **Composite Items Workbooks** in that they are lists of resources that go to make up the above elements of the build. However, unlike the **Composite Items Workbooks** they are linked to a calculation tool provided with **EstimatorXpress®**, which works out the area, length and volume of different shapes and multiplies the unit costs by the calculated areas. These workbooks are provided so that the user can easily create their own calculators based on area, length and volume.

Workbook (Non-Specification Linked)
The **Non-Specification Linked Workbooks** are linked to a range of calculators provided within **EstimatorXpress®**, and provide a variety of complex calculations for items such as as, manholes, fencing, patios, chimneys, plaster patching and other renovation items.

Workbook (Specification Linked)
The fully **Specification Linked Workbooks**, which include Cavity Walls, Block Walls and Apex Roofs carry out the detailed and complex calculations. For example, the roof **Workbooks** will, with just a few basic dimensions, calculate all of the roof geometry, working out rafter lengths, roof areas, gutter requirements etc. and then estimate all the labour and materials required. The fully **Specification Linked Workbooks** are **linked** to the **Specification**, and automatically **"**look up**"** the standard Material and labour resources defined in the **Specification**.

Workbook (Composite)
Composite item **Workbooks** such as Bathrooms, Kitchens and Staircases are simply a list of resources that go to make up that element of the build and are not dependant on you inputting dimensions.
For example, a Bathroom **Workbook** could contain several **Worksheets**... one for each bathroom in a house. Each **Worksheet** could contains the various fittings required for each bathroom

Worksheet
Each **Workbook** can contain several **Worksheets**. For example, you may wish to estimate two different types of cavity walls in one **Job** such as front cavity wall in stone and rear cavity wall in brick. You would then need a separate **Worksheet** for the Rear **Brick** Walls and a separate sheet for the Front **Stone** Faced Walls in a house reflecting the different materials used in the walls. Both of these **Worksheets** will be estimated with the Cavity Wall **Workbook**.

Zoom
EstimatorXpress® allows you to predefine the amount of information viewable at any time by modifying the Zoom setting. The Zoom may be modified permanently by using the Zoom option in the View Menu on the Menu Bar.

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