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®.

	News
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Software Version	If you're looking for an added wow-factor, gi your prospects a quote including PVC-U products from the massive range at Crystal
Support & Updates	Direct. The PVC-U Bonus Back will be update this month to calculate cavity closers and will link to your live Crystal Direct prices. To mark the update the Bonus Pack is yours FREE on i
Merchant Accounts	release UNTIL 30.11.15 with active Support 8 Updates. Click here for the full article
	<u> </u>

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.

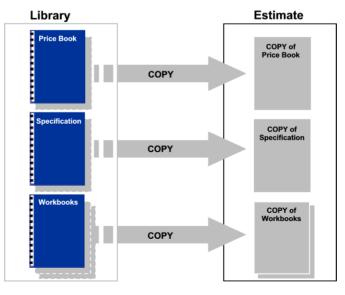
ESTIMATING SYSTEM

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 Books** 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]

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The Specification

EstimatorXpress® is provided with five standard Specifications to get you started. The Specifications 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 **Specifications** 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.

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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.

FILE Estimator	(press Toolkit Tools/Op		timatorXpress®	2015 (Job Tem	plate File.xls) - Job 16
Close Open A	Add Delete Recalc kbook Workbook Estimate	Save Import PlansXpr Drawing	A Z Sort Workbooks	Find Get Ma	aterials ote
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Brick and Block Cavity Wall Extension Slab Volume Apex Valley Roof Window Typical Panel Doors Suspended Floor Structural Opening Shallow Access Manhole Drainage Plant Drain Runs Subcontract Quotations Bathroom and Cloaks Block Wall		£ 6,738.42 £ 654.10 £ 5,11.85 £ 5,11.85 £ 872.52 £ 405.04 £ 934.67 £ 861.12 £ 472.22 £ 167.20 £ 242.42 £ 2,600.00 £ 407.59 £ 1,453.44	Yes Yes Yes Yes Yes Yes Yes Yes	Completed Completed Completed Completed Completed Completed Completed Completed Completed Completed	05/03/2015 10:35 05/03/2015 10:35 19/11/2015 17:23 19/11/2015 13:48 05/03/2015 10:35 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36 05/03/2015 10:36
No of Items 14 Remarks	Sub Total (ex VAT & Profit)	£ 21,120.60			

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.

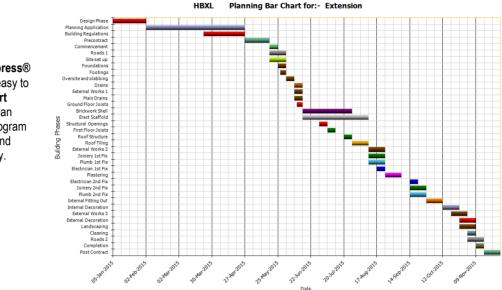
You can also create your own **Workbooks** if you find certain works you undertake do not appear within the **Library of Workbooks**. You can do this in two ways:

- 1. By copying and modifying an existing Workbook to create your own bespoke Workbook
- 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 Feature Fire Place and Fire 75 mm Architectural Stone Cill Fire Stops Apartment Lobby Fitted Kitchen Flat Roof Apex Roof Apex Truss Roof Flat Roof for Bay Window Apex Valley Roof Floor Screed Apex Valley Truss Roof Floorboard Lifting for Installations Architectural Stone Cills Front Door Architectural Stone Quoins Garage Pedestrian Door Area Garage Slab Attic Block Wall Garden Wall Attic Shaped Wall Decoration Gas Flue System Attic Shaped Wall Finishing General Electrical Installation Attic Stud Wall Glulam Beam Attic Suspended Floor Gypsum Silent Floor Renovation Attic Suspended Floor for Side Voids Hacking Plaster from Walls Attic Suspended Floor for Truss Roof Half Hip Roof Attic Wall and Sloping Ceiling Decoration Half Hip Truss Roof Back Door Half Turn Staircase Basic Plaster Patching Half Turn Staircase with 2 Intermediate Landings Hardwood 1200 French Door Basic Plasterboard and Skim to Timbers Basic Plasterboard and Skim to Walls Hardwood 1800 French Door Basic Plastering and Insulation to Walls Hardwood 2400 French Door Basic Plastering to Walls Hardwood Custom Size Window Hardwood Custom Size Window for Dormer Basic Rendering to Walls Basic Tapered Edge Plasterboard and Skim to Walls Hardwood Replacement Window Bathroom and Cloaks Hardwood Standard Bay Windows **Bathroom Electrics** Hardwood Standard Walk-In Bay Windows Beam and Block Floor Hardwood Windows 1050 Deep Bi-fold Patio Doors Aluminium Hardwood Windows 1200 Deep Bi-fold Patio Doors Hardwood Header Course House Slab Bi-fold Patio Doors Softwood Bi-fold Patio Doors uPVC 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

EstimatorXpress® Tutorial

Block Paving Block Wall Brick and Block Cavity Wall Brickwork Arches Ceramic Wall Tiling Chasing Walls Chimney Chimnev 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 Edainas 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 I 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

EstimatorXpress® Tutorial

Deckina **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 Turfina 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

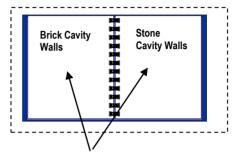
UNDERSTANDING THE DIFFERENT TYPES OF WORKBOOKS

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

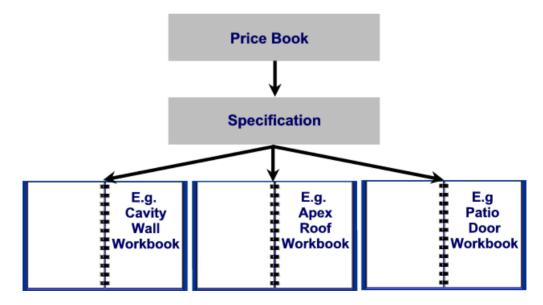
The **Specification Linked Workbooks** deal with the main fabric of a house. They include Cavity Walls, Block Walls and Roofs. These **Workbooks** carry out the detailed and complex calculations of the house. For example, the roof **Workbooks** will, with just a few basic dimensions, calculate all of 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 **Worksheets**, 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

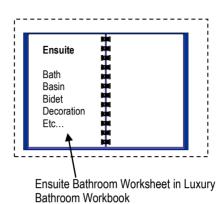
THE COMPOSITE ITEMS WORKBOOKS

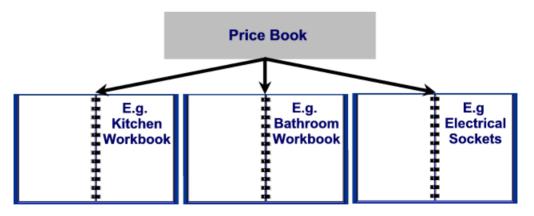
Composite Items Workbooks deal with the highly variable elements of a house and are simply a list of resources that go to make up the cost of any random selection of resources. Examples of **Composite Items Workbooks** include **Fitted Kitchen**, **Bathroom and Cloaks** and **Electrical Sockets**.

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...

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 <u>not</u> 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.

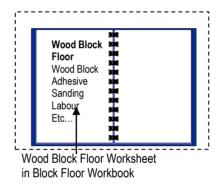
Based on an Area Workbook you could create your own Workbook for

costing a wood blocked floor comprising:

- Wood Blocks
- Adhesive
- Sanding
- Labour

In this way, you can quickly build up your own Library of Workbooks for the specific Jobs you encounter.

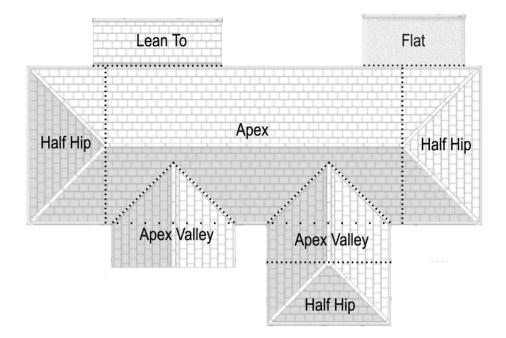
NOTE: The Area, Perimeter and Volume Workbooks are <u>not</u> linked to the Specification, as Materials and other resources contained in the Area, Perimeter and Volume Workbooks, are by their nature completely "free form" and not governed by the general Specification.



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, $\pounds 12.00$ 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 $\frac{1}{2}$ 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 $=3m \times 2m = 6 m^2$



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 $\pounds 0.25$ per brick. To convert the **Purchase Cost** to the **Estimate Rate**, i.e. how much it costs per m², we need to apply the **Production / Usage Factor** of **60** to convert single bricks to m².

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

 $\pounds90 + \pounds108 = \pounds198.00$

(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 m²

The cost of laying the bricks $=6m^2 \times \pounds 18.00$ $=\pounds 108$ 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**®.

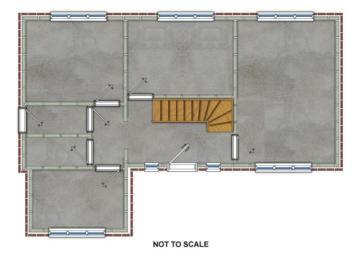
The time required to complete each section is indicated in minutes at the introduction. The whole Tutorial should take approximately 2-3 hours to complete.

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.



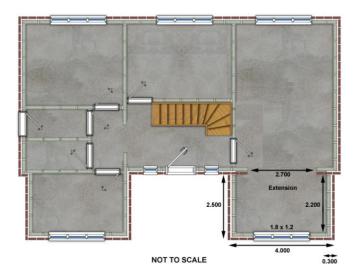
EXTENSION PLAN

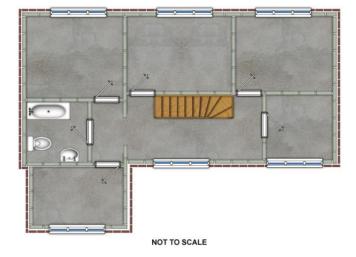
Below is a basic plan of the extension that you will be estimating throughout the Tutorial. You will need to refer back to this drawing. All dimensions on the plan are given in metres.



ORIGINAL HOUSE GROUND FLOOR

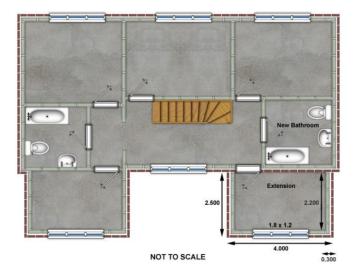






ORIGINAL HOUSE 1st FLOOR

EXTENDED HOUSE 1st FLOOR



EstimatorXpress® Tutorial

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.

Download Prices

[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**.

		Master Price	Book.xls - Maste	r Price Book		
Close New Edit Delete Mass Editing Download Web Resource Resource Resource Tools * Prices Catalogue	Types Sectio Filters	(All) Material	¥ ¥			
Editing Mode		The prices qu	oted to you are	indicative, may be subject	to change, cannot be	guaranteed and are
Description	-	List Price 🔄	Discount - A	djustment 🔽 Unit of Supply	Purchase Cost	- Supplier J
Ballast Bulk Bag		£ 50.00	0.00%	0.00% EA		0 HBXL Price Tracker
Building Sand Bulk Bag		£ 50.00	0.00%	0.00% EA		0 HBXL Price Tracker
Building Sand Standard Bag		£ 4.60	0.00%	0.00% EA		0 HBXL Price Tracker
Coursing Block 3.6N 150mm		£ 63.00	0.00%	0.00% M2		0 HBXL Price Tracker
Grey Limestone Chippings Small Bag		£ 8.00	0.00%	0.00% EA		0 HBXL Price Tracker
Kiln Dried Sand Standard Bag		£ 7.30	0.00%	0.00% FA		0 HBXI Price Tracker
Pea Gravel Bulk Bag		£ 61.00	0.00%	0.00% FA	£ 61.0	0 HBXL Price Tracker
Plastering Sand Bulk Bag		£ 51.00	0.00%	0.00% EA	£ 51.0	0 HBXL Price Tracker
Sharp Sand Bulk Bag		£ 50.00	0.00%	0.00% EA	£ 50.0	0 HBXL Price Tracker
Sharp Sand Standard Bag		£ 4.70	0.00%	0.00% EA	£ 4.7	0 HBXL Price Tracker
Solid Dense Concrete Block 7N 440 x 215 x 150mm		£ 35.00	0.00%	0.00% M2	£ 35.0	0 HBXL Price Tracker
Sub Base MOT Type 1 Bulk Bag		£ 51.00	0.00%	0.00% EA	£ 51.0	0 HBXL Price Tracker
Tarmac 20mm base course (16 to 20 Tonne) (Allowance £75)		£ 75.00	0.00%	0.00% Tonne	£ 75.0	0 HBXL Price Tracker
Tarmac 28mm base course (16 to 20 Tonne) (Allowance £70)		£ 70.00	0.00%	0.00% Tonne	£ 70.0	0 HBXL Price Tracker
Tarmac 6mm wearing course (16 to 20 Tonne) (Allowance £80)		£ 80.00	0.00%	0.00% Tonne	£ 80.0	0 HBXL Price Tracker
Dishwasher (Allowance £300)					£ 300.0	0 HBXL Price Tracker
Freezer - Built In (Allowance £500)	💼 Download	ling Prices			£ 500.0	0 HBXL Price Tracker
Fridge Freezer (Allowance £400)					£ 400.0	0 HBXL Price Tracker
Gas Hob (Allowance £200)					£ 200.0	0 HBXL Price Tracker
Kitchen Extractor Fan (Allowance £70)					£ 70.0	0 HBXL Price Tracker
Microwave (Allowance £400)			D 100/		£ 400.0	0 HBXL Price Tracker
Oven - Built In (Allowance £700)			Progress: 10%		£ 700.0	0 HBXL Price Tracker
1055 x 150mm Architectural Stone Cill		11-1-C D-		Dia Tradas	£ 32.0	0 HBXL Price Tracker
1055 x 225mm Architectural Stone Plain Stone Head		Updating Pri	ces From HBXL I	Price Tracker	£ 32.0	0 HBXL Price Tracker
1055 x 225mm Architectural Stone Tapered End Stone Head						0 HBXL Price Tracker
1055 x 225mm Architectural Stone Tapered End Stone Head With Keystone						0 HBXL Price Tracker
1055 x 75mm Architectural Stone Cill						0 HBXL Price Tracker
1067 x 150mm Architectural Stone Cill		£ 32.00	0.00%	0.00% Each		0 HBXL Price Tracker
1067 x 225mm Architectural Stone Plain Stone Head		£ 32.00	0.00%	0.00% Each		0 HBXL Price Tracker
1067 x 225mm Architectural Stone Tapered End Stone Head		£ 32.00	0.00%	0.00% Each	£ 32.0	0 HBXL Price Tracker

Close New

Editing Mode

Editing Mode Description Balast Bulk Bag Building Sand Standard Bag Building Sand Standard Bag Coursing Block 3.6N 150nm Grey Limestone Chippings Small Bag Kin Dried Sand Standard Bag Bag Gravel Bulk Bage

Pea Gravel Bulk Bag Plastering Sand Bulk Bag

Edit

Resource Resource Resource

Library of Price Books \ Master Price Book

Delete Mass Editing Download Web

Tools -

Prices Catalogue



The prices quoted to

List Price Disco £ 50.00 £ 50.00 4.60 63.00 £ 8.00 7.30

applying Merchant Terms to your prices (if

your keyboard. Please see page 8 for

applicable) click Help or press the F1 key on

information on access to Merchant catalogues.

Section Material

£ 61.00 51.00

Find Filters

Sharp Sand Bulk Bag		£ 50.00
Close	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

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.

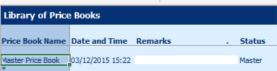
My Settings



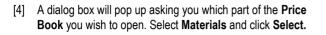
My Price Books

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









EstimatorXpress® 20	15
Select a section of topen. Labour Material Plant Subcontractor Sundry	the Price Book to ✓ Select ✓ Cancel



[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.

Are you currently logged on to the internet? Yes No

EstimatorXpress® 2015

[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.

- **Download Prices**
- [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.

EstimatorXpress® 2015 Are you currently logged on to the internet? Yes No

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 .	Close
2.	Press the Close button again to return to the My Settings Menu .	Close
3.	In My Settings Menu, press the Back button to return to the Main Menu.	Back

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



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.



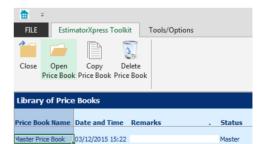
[2] From the **My Settings Menu**, click on the **My Price Books** button.

My Price Books

[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**.

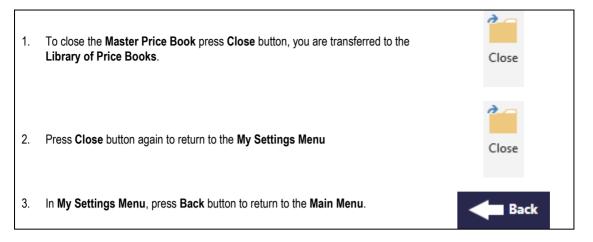
NOTE: To add a new **Supplier** to your **Price Book**, click on the **Add** button next to the **Supplier/Contractor** drop down box.

- [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.

FILE Estim	iatorXpress	Toolkit T	ools/Options			Carried Color		s (sample th)	- Job 23: pipe test,
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ew Resource	(
Description:	Thermalite Turbo Block 440 x 215 x 100mm
Code:	2201170712158
Unit Cost (£):	12.00
Discount (%):	0
Adjustment (%):	0
Net Purchase Cost:	£12.00
Units of Purchase:	M2 💌 🔹
Supplier/Contractor:	HBXL Price Tracker 🗨 🔹
Type:	Blocks 💌 🔹
Delivery (Weeks):	2
Payment (Weeks):	5
Comments/Code:	
Last Updated:	05/03/2015
VAT (%):	20.00%
Wastage (%):	7.5
	☐ Clear ✓ QK X Cancel



CREATING A SPECIFICATION

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.

estimator

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**.

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.

Library of Specifications		
Specification name	Comments .	
New Build Specification Extension Specification Timber Frame Specification Site Fab Timber Frame Spec New Build Part L Spec Site Fab Timber Frame Part L Timber Frame Part L Spec		



Spec

[5] Press Copy Spec button.

EstimatorXpress® 2015				
Enter a Specification name.	✓ <u>O</u> K			
Name	★ <u>C</u> ancel			

FLE Estimator/Xpress Toolkit Tools/Options	EstimatorXpress® 2015 (Default Resources.xls) - New Specificati	n		1
Cose Change Edit Markers Find Fitters CreaterEdit Mini-Spec Resource Resource				
Library of Specifications \ New Specification				
New Specification			Purchase	
Item used for:	Description	Units	Cost	Phase
Cavity Wall Specification (And General Walling Specification)				
Structural concrete	Rimix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £100)	M3		Foundations
Mass concrete Trench Blocks	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £100) Trench Block 440 x 215 x 300mm	M3		Foundations
rench blocks Coursing blocks to inner leaf below dpc	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	M2 FA		Footings Footings
Coursing blocks to outer leaf below dpc	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	FA		Footings
Blockwork to Inner leaf below doc	Solid Dense Concrete flick 7N 440 x 215 x 100mm	M2		Footings
liockwork to outer leaf below dpc	Sold Deose Concrete Block 74 440 x 215 x 100mm	M2		Footings
Bricks below splash course	Facing Bricks - Provisional (Allowance (0.40 each)	Fach		Footings
Cavity Fill	Rimix Concrete GEN 1, 125mm skimp 2-3 m3 (Allowance £105)	M3		
Iricks for use in splash course	Engineering Brick - Class A Blue 65mm	EA	£ 1.30	Footings
tricks above dpc less openings	Facing Bricks - Provisional (Allowance (0.40 each)	Each	£ 0.40	Brickwork She
Nocks above dpc less openings	Insulation Block Standard 440 x 215 x 100mm	M2		Brickwork She
Coursing blocks above dpc to inner leaf	Insulation Coursing Block 3.5N 100mm	M2		Brickwork She
Coursing blocks above dpc to outer leaf	Solid Dense Concrete Coursing Brick 7N 215 x 65 x 100mm	EA		Brickwork She
Cavity Insulation	Cavity Wall Insulation 100 x 455 x 1200mm 10 Sheets 5.46m2	EA		Brickwork She
insulation jointing tape	Not required	Unit		Brickwork She
brick bes	Bridwork Tie DD 140 Type 4 225mm	EA	£ 0.20	Brickwork Sh

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.
- [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.

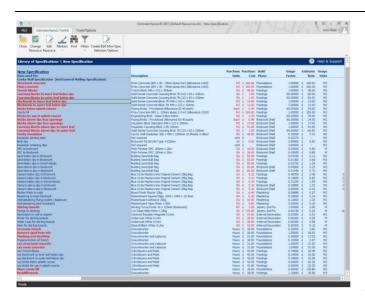
[7] In the Specification you have created, take a few moments to scroll across the screen. The screen is divided into several columns including the following:

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.)



13

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

(9

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



Purchase Cost:		
Item used for:	Blockwork to Inner leaf below dpc	
Resource:	Thermalite Turbo Block 440 x 215 x 100mm	
Resource Cost	£13.00 per M2	
Jsage:		Build Phase:
Usage Units: Usage Factor:		Footings 💌 🕈 Add
Estimate Rate:		·
£13.00 per m²		

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

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 $\ensuremath{\textit{EstimatorXpress}}\xspace^{\ensuremath{\mathbb{R}}}$ the $\ensuremath{\textit{Main}}\xspace$ means 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.

New Estimate

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

 FILE
 Estimate/Xpress Toolkit
 Toolk/Options

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Estimate Wizard - Step 1 of 8

- [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.)

🔿 Next

[5] Click Next.

Enter a name for your new Estimate and enter or select a Job Description.				
Job Name:	Mr Philips			
Job Description:	Extension			
Job Number:	19			
The Job Name and Job Description appear on the Customer Quote but do not affect the content of the Estmate.				
Import from Plans	Xpress™ drawing: (no drawing selected)			
43				
	Cancel 🛞 Back 🛞 Next			

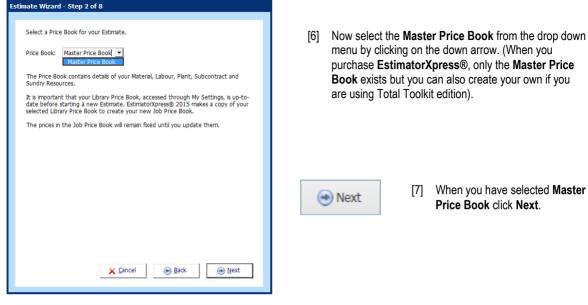
My Estimates

Xpress® 2015 (Jobs Directory File.xls) - My Jobs



[7] When you have selected Master

Price Book click Next.



nate Wizard -	Step 3 of 8
Select a Specific	tation for your Estimate.
Specification:	New Build Specification
Mini-Specs: Roof Tiling	Extension Specification Renovation Specification Timber Frame Specification Specification
External Wall Br	New Build Part L Spec Specification Site Fab Timber Frame Part L Timber Frame Part L Spec
Materials, Labou	New Specification Ints together with their associated r and Plant and appropriate rates of use.
your new Job S	© 2015 makes a copy of your selected Library Specification to create pecification. hat your Library Specification, accessed through My Settings, is up-
to-date before	starting a new Estimate. You may make adjustments to your Job chout affecting the Library Specification.
	responsibility to ensure that the specification of your estimate It building regulations.
	X Cancel (Back (Next

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

menu by clicking on the down arrow. (When you

are using Total Toolkit edition).

Next

purchase EstimatorXpress®, only the Master Price

Book exists but you can also create your own if you

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).

44 Tutorial Creating The Extension Estimate

Estimate Wizard - Step 3 of 8	
Select a Specification for your Estimate. Specification: New Build Specification Hini-Specs: Roof Ting External Wall Brickwork The Specification Ists the various built Materials, Labour and Plant and apport State for Ist Wall Bild Materials, Labour and Plant and apport Extra torXpress@ 2015 makes a copy specification, or Renovation Extra torXpress@ 2015 makes a copy specification, or Renovation Extra torXpress@ 2015 makes a copy specification, or Renovation Extra torXpress@ 2015 makes a copy specification, accessed through My Settings, is up- to-date before starting a new Estimate. You may make adjustments to your Job Specification without affecting the Library Specification of your estimate meets al relevant building regulations. Ist relevant building regulations.	[9] The Roof Tiling drop-down box can be used to quick change the tiles that are used within the roof workbooks in the estimate. For the moment leave this set as Same as Specification .
Estimate Wizard - Step 3 of 8 Select a Specification for your Estimate. Specification: New Build Specification Mini-Specs: Thin Specification I Step 3 of 8 Select a Specification The Specification I Step 4 of 9 faints Select a Specification Step 4 of 11ing Same as Specification Step 4 of 12 of 1	 [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. ••••••••••••••••••••••••••••••••••••

- e Wizard Step 4 of 8 **Attic Shaped Wall Finishing** Group of Workbooks Apartment Shell and External Work The Attic Shaped Wall Finishing Workbook allows you to Filters: ate Labour. Material and Plant items which are requ ined to Apartment Inter Large Extension Lean To Extension Apex Roof Exten Valley Roof Exten ster and decorate the shaped (gable) attic walls. Y Name ust enter the dime ns of the walls, togethe Attic Shaped V Valley Roof E Elat Roof Ext ns such as plant Clad Dormer Wa Lofts Clad Dormer Wa Extension Demo Flat Roof Garage Clad Dormer Wa Cut Roof Attic Interior Conversion Lead Dormer Walls For Flat Roof Attic Lead Dormer Walls For Hip Roof Attic Lead Dormer Walls For Slope Roof Attic Loft Sundries Atti • he Attic ollowing item · Directory You can later add or delete Workbooks from within your Estimate at any time Internal de ulation to walls and ceiling X Cancel

 Back

 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.



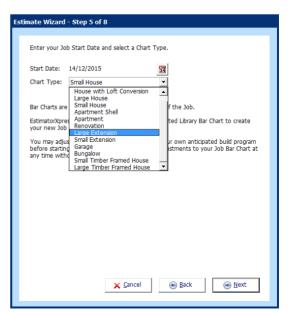
[13] When you have selected Extension Demonstration click on the Next button.



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 ${\bf Job}$ 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.



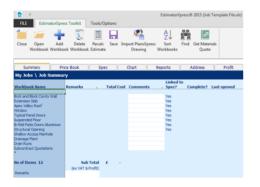
NOTE: You can edit the **Inflation Rates** from within the **Job** later on.

Estimate Wizard - Step 6 of 8					
Enter your Customer Address Details.					
Name:	Mr Philips				
Address 1:	69 Hayward Road				
Address 2:	Bristol				
Address 3:					
Postcode:	BS49 1XY				
Tel:					
The Custom	ner Address Details appear on your Reports and Customer Quote.				
This informa	ation can be edited later on from within the Estimate.				
	🗙 Cancel 💿 Back 🛞 Mext				
Estimate Wizan	Estimate Wizard - Step 7 of 8				

Confirm your Droft Markun

Labour %	30	
Plant %	30	
Material %	30	
Subcontractor %	30	
Sundry %	30	
These Profit Marku My Settings.	ups are copied fro	om the standard target Profit Markups set up in
You can amend th	e Profit Markups	for each Resource type in the Job.
You can later adju affecting the stand		rkups within the Job at any time without
arrecting the stand	uaru Profic Marku;	ps.
	×	Cancel 🛞 Back 🛞 Next
timate Wizard - St	ep 8 of 8	
timate Wizard - St	ep 8 of 8	
		e Delay before inflating cost.
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[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.

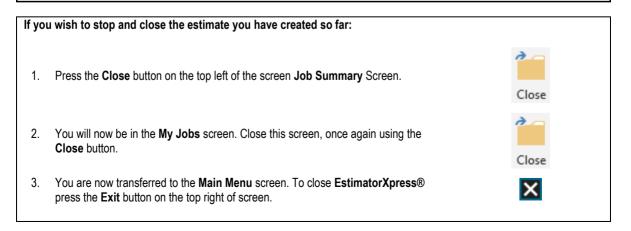
You have now assembled the basic elements for estimating the extension. You have:

- ✓ 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 <u>COPIES</u> of the Price Book, Specification and Workbooks and transferred them into your Estimate, ensuring you do not damage the originals.

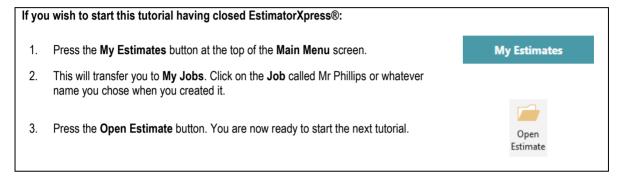
Any changes you make to the Price Book, Specification and Workbooks in your estimate *will not* affect the Master Price Book, Specification and Workbooks in their respective Libraries. Remember that the Master versions of the Price Book, Specification and Workbooks can only be viewed or modified using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



ESTIMATING THE EXTENSION

BRICK & BLOCK CAVITY WALLS

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:



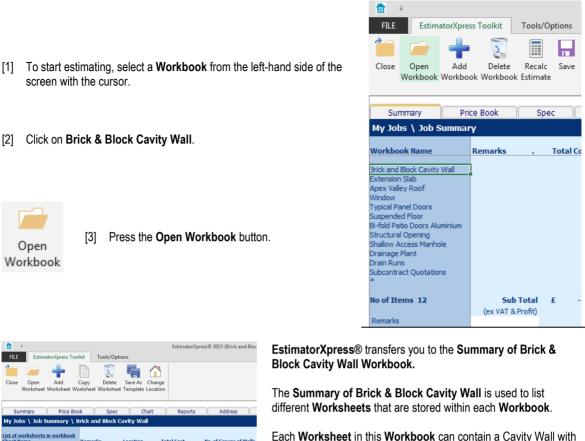
Now that you have set up the extension estimate, you can now start actually estimating. This exercise will lead you through the estimating of the **Brick & Block Cavity Walls** and **Gables** for the extension.

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.

e File EstimatorXpress To	olkit Tools/Options Workbooks	Estimatox/spress @ 2015 (J	The Job Summary screen is the "control centre" or "hub" of
Close Open Add Workbook Workbook W	Delete Recalc Save Import PlansXi Vorkbook Estimate Drawing	tess Sign Off Sort Find Get Materials Estimate Workbooks Quote	your Estimate.
Summary Price B My Jobs \ Job Summary	ook Spec Chart	Reports Address Profit Inflation Company	Notice that EstimatorXpress® has copied the Extension
Workbook Name	Remarks . Total Cost	Comments Linked to . Spec? Complete? Last opened	Demonstration Workbooks into the Job Summary screen.
Brick and Block Cavity Wall Extension Slab Apex Valley Roof Window		Yes Yes Yes	At this stage, no costs are indicated for each Workbook, as
Typical Panel Doors Suspended Floor Bi-fold Patio Doors Aluminium		Yes Yes Yes	you have not carried out any estimating for the extension.
Structural Opening Shallow Access Manhole Drainage Plant Drain Runs		Yes	For further Help about this screen press the help button
* No of Items 12	Sub Total £ -		or press the function key F1.
Remarks	(ex VAT & Profit)		

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.





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.

Total Cost

£



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	EstimatorXpre	ess® 2015		
	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.	Enter a W Name Location	orksheet name for this External Walls	Brick and	Block Cavity Wall.
	You must then select a location using the drop down box. Scroll down using the pull down arrow until you find Extension . Select Extension .		Ensuite 1 Ensuite 2 Extension External Works Factory Family Room Female Toilets		X Cancel
	Click OK when finished.		Fornale Tollets Front Front Extension Front Garden		
	NOTE: You must complete both boxes on the dialog box before clicking OK .		Front Projection Garage	•	

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.

✓ <u>Select</u>

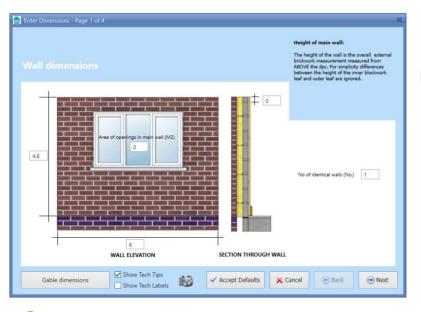
[5] For this two storey extension, select **Double storey cavity wall** and click **Select**.

Select a Dimensional Template, or click Edit to create your own.	EstimatorXpress® 2015	
Single storey cavity wall ✓ Select Double storey cavity wall Image: Control of the storey cavity wall Part L - Double storey cavity wall Image: Control of the storey cavity wall Single storey cavity wall (without foundations) Image: Control of the storey cavity wall (without foundations) Double storey cavity wall (without foundations) Image: Control of the storey cavity wall (without foundations) Part L - Double storey cavity wall (without foundations) Image: Control of the storey cavity wall (without foundations) Part L - Double storey cavity wall (without foundations) Image: Control of the storey cavity wall (without foundations) Foundations only Foundations only Gable only Gable only	Select a Dimensional Template, or click Edit to create your own. Single storey cavity wall Part L - Single storey cavity wall Double storey cavity wall Part L - Double storey cavity wall Single storey cavity wall (without foundations) Part L - Single storey cavity wall (without foundations) Double storey cavity wall (without foundations) Part L - Double storey cavity wall (without foundations) Part L - Double storey cavity wall (without foundations) Foundations only Part L - Foundations only	<u>∐</u> dit



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.

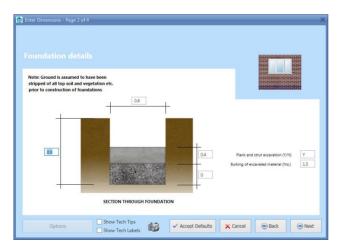
TO ESTIMATE WALL 1 & 2:

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.

ns - Page 3 of 4 [14] Now confirm or make any changes you think are necessary to the Footing Details. If you are unsure what dimension the software 0.1 requires, turn on the **Tech Tips** by clicking on Brick splash course DPC level Show Tech Tips checkbox. Extra help will Brickwork I 0.15 appear in the top right hand corner of the dialog 0.225 0.45 0.075 box. 0.225 strip leve OW DP 0 Is main wall insulated? (Y/N) Y Click Next when you are satisfied with the 0.225 Is there a separate DPC? (Y/N) Y Height of Trench Blocks: footing details. Mass concret TIP: Clicking Show Tech Labels check box Trench blocks SECTION THROUGH FOOTING underneath the graphic will switch on useful Show Tech Tips 💿 Back extra labels on the drawings. Accept Defaults × Cancel Next 100 Show Tech Labels [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. Y of skirting boards to main wal Is main wall skirting primed? (Y/N) [16] Click Finish when you have checked these all skirting decorated? (Y/N details. INTERNAL PLASTERED WALL ELEVATION Plastering and decoration to ga 162 ✓ Accept Defaults X Cancel Sack ✓ Finish

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.

★			Estimat	orXpress® 2
FILE EstimatorXpress Toolkit 1	Fools/Options			
📁 🖬 📄 💽 📈	Q	-17		
Close Add Copy Delete Dims Column Column Column Wizard	View Resourc Output	es Resources Wizard	Filters •	
Summary Price Book	Spec	Chart	Repo	orts
My Jobs \ Job Summary \ Brick and	d Block Cavi	ity Wall \ E	cternal Wa	ls - Dims
£ 3,777.7 <u>Mr Phililips</u> Brick and Block Cavity Wall External Walls	2 Location	Wall 1 and 2		
Description	Units			
No of identical walls	No.	2.000		
Length of main wall Height of main wall Height of coursing blocks above dpc	M M M	2.500 4.600		
Area of openings in main wall	M2	-		

- 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!

[17] Label this column of information by doubleclicking 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.

Add			
Column			

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

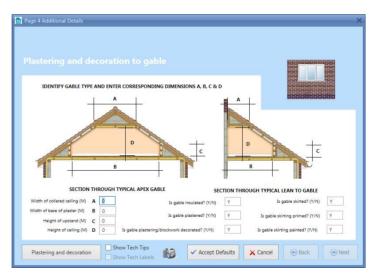
[19] Click on **Double storey cavity wall** again and then press **Select**.



- [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.

IDENTIFY GABLE TYPE AND ENTER CORRESPONDING DIMENSIONS A & B	
	Area of openings in gable (M) 0 Width of brick gable (M) A 4 Height of brick gable (M) B 3
VPICAL LEAN TO ROOF GABLE ELEVATION TYPICAL APEX ROOF GABLE ELEVATION	

- [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.



			Es	timatorXpres	s® 2015 (Brick and
FILE EstimatorXpress Toolkit	Tools/Option	s			
			29		
			••••••••••••••••••••••••••••••••••••••		
	View Resour				
Column Column Column Wizar	d Output	Wizi	ard 👻		
Summary Price Book	Spec	Ch	art	Reports	Address
My Jobs \ Job Summary \ Brick a	nd Block Cav	itv Wal	\ Externa	Walls - Dir	ns
			•		
£ 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	м	4.000	2.500		
Height of main wall	M	4.600	4.600		
Height of coursing blocks above dpc	M	4 000	-		
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	м	0.150	0.150		
Brickwork depth below splash course	M	0.075	0.075		
Cavity fill depth below top of dpc Height of blockwork to inner leaf below dpc	M	0.225	0.225		
Height of blockwork to inner leaf below dpc Height of blockwork to outer leaf below dpc	• M	0.450	0.450		
Height of coursing blocks to inner leaf below dpc		0.225	0.225		
Height of coursing blocks to ninter leaf below d		-	-		
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)	м	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 Is main wall skirting primed?	Y/N	2.000 Y	2.000 Y		
is main wall skirting primed? Is main wall skirting decorated?	T/N Y/N	Y	Y		
Is there a separate DPC?	Y/N	Y	Y		
Is main wall insulated?	Y/N	Y	Ý		
	1/13	· '			
Height of brick gable	<u>м</u>	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.

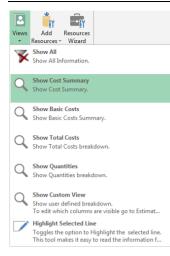


Output

- [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 dropdown menu to look at the output. Choose from Show Cost Summary, Show Basic Costs, Show Total Costs, Show Quantities and Show All.

📅 =		EstimatorXpress® 2015 (Brick a	and Block Cavity Wall.»	ls) - Job 19: Mr Phili	lips, Extension	$\gg/$
FILE EstimatorXpress Toolkit	Tools/Options					
Back Change Edit Markers Resource Resource *	Views Views Resources Vizard					
	Show All Show All Information.					
Summary Price Book	Show All Information.	ddress	Profit	Inflation	Compare	
My Jobs \ Job Summary \ Brid	Show Cost Summary	cterna	l Walls - Resource	s		
No. of Groups of Walls Total Cost of Groups	Show Cost Summary.	1.00 68.29				
Item used for:	Show Basic Costs Summary.		Purchase Purchase Unit Cost	Build Phase	Production/ Usage Factor	Estimate Rate
Structural concrete Mass concrete Cavity Fil Trench Blocks	Show Total Costs Show Total Costs breakdown.	00) 00) .05)	M3 £ 100.00 M3 £ 105.00 M2 £ 49.00	Footings	1.00000	£ 100.00 £ 100.00 £ 105.00 £ 49.00
Blockwork to Inner leaf below dpc Blockwork to outer leaf below dpc Bricks below splash course Bricks for use in splash course Bricks above dpc less openings	Show Quantities Show Quantities breakdown.		M2 £ 13.00 Each £ 0.40 EA £ 1.30	Footings Footings Footings Brickwork Shell	1.00000	£ 13.00 £ 13.00 £ 24.00 £ 78.00 £ 24.00
Blocks above dpc less openings Coursing blocks above dpc Coursing blocks to inner leaf below Coursing blocks to outer leaf below	A Show Custom View Show user defined breakdown To edit which columns are visi	ble go to Estimat	M2 £ 17.00 M2 £ 41.00 EA £ 1.00 EA £ 1.00	Brickwork Shell Brickwork Shell Footings Footings	1.00000 1.00000 60.00000 60.00000	£ 17.00 £ 41.00 £ 60.00 £ 60.00
Cavity Insulation Insulation jointing tape Brick ties Insulation retaining clips DPC to brickwork	Highlight Selected Line Toggles the option to Highligh This tool makes it easy to read	the information f	Unit £ - EA £ 0.20 Unit £ -	Brickwork Shell Brickwork Shell Brickwork Shell Brickwork Shell Brickwork Shell	3.00000 3.00000	£ 7.32 £ - £ 0.60 £ - £ 0.80



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.

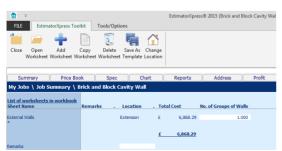
Summary	Price Book	Spec	Chart	Reports	Address	Profit	Inflatio
My Jobs \ Job S	ummary \ Brick ar	nd Block Cavi	ity Wall \ Ext	ernal Walls - Din	ıs \ External	Walls - Resour	ces
No. of Groups of Wa					1.00		
Total Cost of Group	5	£			6,868.29		
		Mr Phililip				Purchase Purcha	
Item used for: Structural concrete		Description Description		mm slump 6m3 (Allow	anca (100)		ost Phase 00 Foundation
Mass concrete				mm slump 6m3 (Allow			00 Foundation
Cavity Fill				m slump 2-3 m3 (Allov			00 Footings
Trench Blocks		Trench Blos	dk 440 x 215 x 300	Dmm		M2 £ 49.	00 Footings
Blockwork to Inner			Turbo Block 440 x				00 Footings
Blockwork to outer				N 440 x 215 x 100mm			00 Footings
Bricks below splash				lowance £0.40 each)			40 Footings
Bricks for use in spl			g Brick - Class A Bl				30 Footings
Bricks above dpc le	ss openings	Faong Brid	ks - Provisional (Al	lowance £0.40 each)		Each £ 0.	40 Brickwork S
***				EstimatorXpress	@ 2015 (Brick a	nd Block Cavity W	all.xls) - Job 19
-				catinatorypres	-0 2013 (DIICK 0	na block curity th	11.03) 700 15
FILE Estimat	torXpress Toolkit	Tools/Options					

EstimatorXpress® 2015 (Brick and Block Cavity Wall.xls) - Job 19: Mr Ph



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

Summary	Price Book	Spec	Ch	art	Reports	Address	Profit	Inflation
My Jobs \ Job Su	mmary \ Brick a	nd Block Cav	vity Wal	\ Externa	Walls - Din	15		
£ <u>Mr Phililips</u> Brick and Block Cavil External Walls	6,868 ty Wall	.29 Location	Wall 3	Wall 1 and 2				
Description		Units	1.000	2.000				
ength of main wall leight of main wall		, M	4.000	2.500				



- [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.

×

				EstimatorXpres	s® 2015
[8]	A dialog box pops up asking if this it Click Yes . (<i>This marks the Brick & B</i> <i>the Job Summary Screen</i>)			Is th	nis Workbook now Complete? Yes <u>N</u> o
		FILE EstimatorXpre Close Open Add Workbook Workbook	Delete Recalc Save Import	? ≩↓	ipress® 2015 (Job Template File.xls) - Job 19: Mr Phillifi Find Get Materials Quote
			ice Book Spec Char	rt Reports	Address Profit Inflation
	will now see a final estimate	My Jobs \ Job Summar		Linked	
you	ing for your cavity walls as part of r overall estimate in the Job nmary screen.	Workkook Name Brick and Block Cavity Wall Extension Slab Apex Valley Roof Window Typical Panel Doors Suspended Floor Birdful Patio Doors Autimitum Structural Opening Shallow Access Marhole Drainage Plant Drain Runs Subcontract Quotations *	Remarks . Total Cost Cor £ 6,868.29	mments . Spec? Yes Yes Yes Yes Yes Yes Yes	Complete? Last opened Completed 10/12/2015 11:21
		No of Items 12	Sub Total £ 6,868.29 (ex VAT & Profit)		
		Remarks			
If yo	ou wish to stop and close this curre	ent Estimate:			
1.	Press the Close button on the top	left of the Job Su	mmary screen.		Close
2.	You will be transferred to the My J button.	obs screen. Close	e this screen also usin	g the Close	Close

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.

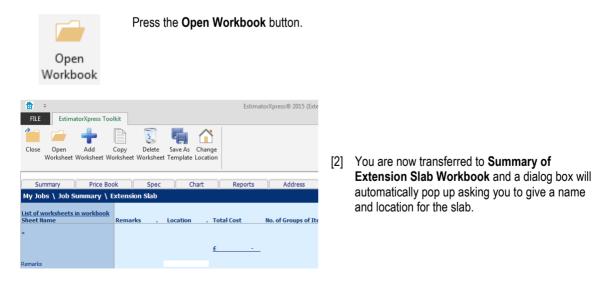
If you have joined this tutorial after having closed EstimatorXpress®, follow the steps below:

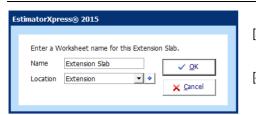
lf yo	ou wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
2.	This will transfer you to the My Jobs . Click on the Job called Mr Phillips or whatever you called the Job when you created it.	
3.	Press the Open Estimate button. You are now ready to start the next tutorial.	Open Estimate

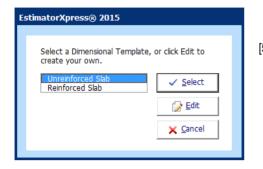
This tutorial leads you through the estimating of the Extension Slab.

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.

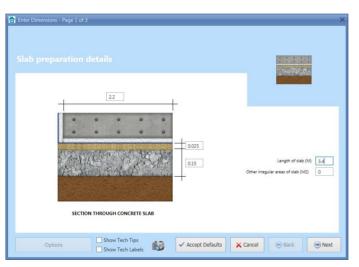






- [3] Enter **Extension Slab** or any name you think is sensible and then select **Extension** for location. Click **OK**.
- [4] EstimatorXpress® transfers you to the Extension Slab Worksheet Dimensions screen.
- [5] Another dialog box will automatically pop up asking you to select a template. Choose 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

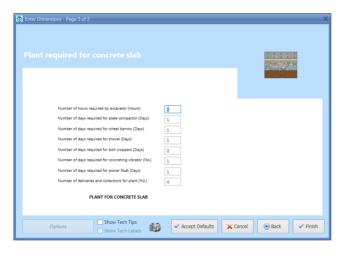
automatically open up a dialog box containing drawings to assist you in entering and confirming dimensions.

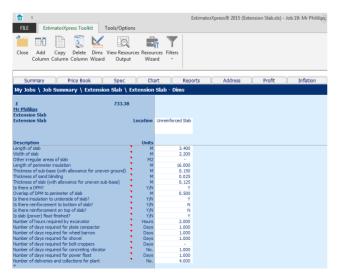
To calculate the area of the **Extension Slab** the extension can be thought of as a rectangle.

	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.

Enter Dimensions - Page 2 of 3	
Slab details	
Is there a DPM? (Y/N)	Y
Overlap of DPM to perimeter of slab (M)	0.5
Is there insulation to underside of slab? (Y/N)	Y
Length of perimeter insulation (M)	16
Is there reinforcement to bottom of slab? (Y/N)	N
Is there reinforcement on top of slab? (Y/N)	N
SECTION THROUGH CONCRETE SLAB Is state (power) float finished? (Y/h)	Υ
Options Show Tech Tips Accept Defaults X Cancel @ Back	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.

	Q
View	Resources

Output

- [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.

* =	EstimatorXpress	® 2015 (Extension Slab.xls) - Job 19: Mr Phililir	os. Extension
FILE EstimatorXpress Toolkit	·	, , , , , , , , , , , , , , , , , , ,	
Back Change Edit Markers Resource Resource Summary Price Book My Jobs \ Job Summary \ Ext No. of Groups of Items Total Cost of Groups	Views Add Resources Resources Wizard Show All Information.	ddress Profit Inflation b - Resources Purchase Purchase Build	Compare Production/ Estimate
Item used for:	 Show Basic Costs Summary. 	Unit Cost Phase	Usage Factor Rate
Shovel for slab construction Power float for slab construction Bolt croppers for slab construction	 Show Total Costs Show Total Costs breakdown. Show Quantities Show Quantities breakdown. Show Quantities breakdown. To edit which columns are visible go to Estimat Highlight Selected Line Toggles the option to Highlight the selected line. This tool makes it easy to read the information f Hornoworker and Labourer Mini Digger & Driver (Br. day) Wheelbarrow Plate Compactor Shovel Poker Bolt Croppers Vibrating Poker Delivery (10 to 15 Miles) 	EA £ 51.00 Oversite and slabbing EA £ 50.00 Oversite and slabbing M5 £ 95.00 Oversite and slabbing EA £ 78.00 Oversite and slabbing EA £ 78.00 Oversite and slabbing EA £ 229.00 Oversite and slabbing Hours £ 31.00 Oversite and slabbing Hours £ 51.00 Oversite and slabbing Hours £ 50.00 Oversite and slabbing Hours £ 6 60.00 Oversite and slabbing Heek £ 60.00 Oversite and slabbing Heek £ 60.00 Oversite and slabbing Heek £ 120.00	2.20000 £ 112.20 2.20000 £ 110.00 1.00000 £ 95.00 0.01000 £ 0.78 0.34700 £ 14.92 0.34700 £ 14.92 0.34700 £ 19.88 0.08680 £ 19.88 0.49500 £ 15.35 0.03850 £ 1.19 0.01550 £ 0.51 0.02750 £ 0.85 0.44000 £ 13.64 0.06600 £ 2.05 0.06600 £ 2.05 0.06600 £ 2.05 0.06600 £ 2.05 0.06600 £ 2.05 0.06600 £ 2.05 0.06600 £ 2.05 0.06800 £ 2.05 0.06800 £ 2.05 0.02000 £ 1.02 0.08800 £ 2.73 0.12500 £ 31.25 0.20000 £ 14.00 0.20000 £ 14.00 0.20000 £ 5.00 0.20000 £ 30.00
Location	Extension	No	-
Remarks		No	26

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.

64 Tutorial Extension Slab

Image: Second system Tools/Option FILE EstimatorXpress Toolkit Tools/Option Image: Second system Image: Second system Image: Second system Image: Second system Close Add Copy Delete Dims Image: Second system Output Close Add Copy Delete Dims View Resou Output	Irces Resources Filters	EstimatorXpress® 2015 (Extension Slab.xl	s) - Job 19: Mr Phililips		
Summary Price Book Spec My Jobs \ Job Summary \ Extension Slab \ I F Phillips Extension Slab Extension Slab	Extension Slab - Dims	eports Address Profit	Inflation	Back	[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
Description Length of slab Other tregular resolutions Thickness of sub-base (with allowance for uneven ground) Thickness of sub-base (with allowance for uneven sub-base) Thickness of sub-base (with allowance for uneven sub-base) To there a DPMP to permeter of slab Overlap of DPM to permeter of slab Is there reinforcement to bottom of slab? Is there reinforcement to to tot no of slab?	Units M 3.4 M 2.2 M 15.00 M 0.1 M 0.0 M 0.1 Y/N Y/N Y/N Y/N Y/N	00 00 50 25 25 Y			Extension Slab Worksheet Dimensions screen.



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



2

Close

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.

Esti	natorXpress® 2015
	Is this Workbook now Complete?

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

FILE EstimatorXpr FILE Close Open Addr Workbook Workbo			Estir Cont PlansXpress So Drawing Workt	rt Find Get Mate	rials	Job 19: Mr Phililip	
My Jobs \ Job Summa				inked to	Profit	Inflation	You will now see a final
Workbook Name Brick and Block Cavity Wall Extension Slab Apex Valley Roof Window Typical Panel Doors Suspended Floor Bi-fold Patic Doors Aluminium Structural Opening Shallow Access Manhole Drainage Plant Drain Runs Subcontract Quotations *	Remarks .	Total Cost	Comments . S	es Completed es es es es es	Last opened 10/12/2015 11:21 10/12/2015 11:41		estimate costing for your Extension Slab as part of the overall estimate cost on screen.
No of Items 12 Remarks	Sub Tota (ex VAT & Profit						

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

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.

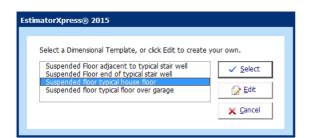
lf you	wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
2.	This will transfer you to the My Jobs screen. Click on the Job called Mr Phillips or whatever you called the Job when you created it.	
3.	Press the Open Estimate button. You are now ready to start the next tutorial.	Open Estimate

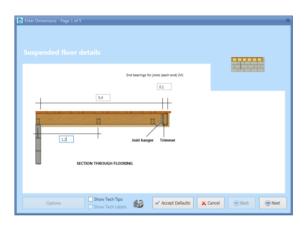
This tutorial leads you through the estimating of a Suspended Floor.

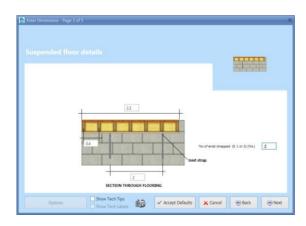
The **Suspended Floor Workbook** is an example of a **Workbook** that is linked to the **Specification** (see page 18 for an explanation of this). To estimate the floor for the 2nd storey of the Extension, simply enter your dimensions into the appropriate cells and **EstimatorXpress**® will schedule 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.

Image: StrimatorXpress EstimatorXpress 2015 (Job Tem) FILE EstimatorXpress Tools/Options Image: StrimatorXpress Image: StrimatorXpress Image: StrimatorXpress Close Open Add Delete Workbook Workbook EstimatorXpress	 To start estimating the Suspended Floor , select Suspended Floor from the left-hand side of the Job Summary screen with your mouse.
Summary Price Book Spec Chart Reports Address My Jobs \ Job Summary Job Summary Linked to Spec? Complete? Last Brick and Block Cavity Wall £ 6,868.29 Yes Completed 10/11: Extension Sales Yes Completed 10/11: Yes Completed 10/11: Apex Valley Roof Yres Yes Yes Superied Bloor Yes Superied Floor Yes Yes Yes Yes Yes	Open [2] Press the Open Workbook button. Workbook
EstimatorXpress@ 2015 Enter a Worksheet name for this Suspended Floor. Name Ist Floor Suspended Floo Location Extension • • • Cancel	 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**.

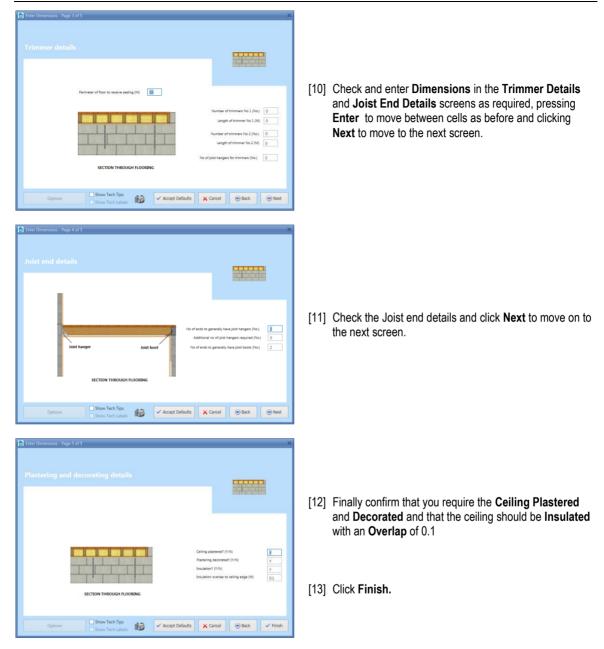
EstimatorXpress® has pre-loaded a standard Suspended Floor template to speed up the estimating process. You must alter the dimensions to suit the Job you are estimating.

- [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.

68 Tutorial Suspended Floor



Suspended Floor Wo	en transfers you back into the orksheet Dimensions screen showing ove just confirmed in the white column.	Close Add Copy Delete Dims View	Options Resources Resources Nutput Wizard
View Resources S	o see the full output of your Suspended Floor Worksheet, press he View Resources Output button.	Summary Price Book Sp My Jobs \ Job Summary \ Suspended Fl £ 1,046.13 Mr Philips Suspended Floor 1st Floor Suspended Floor	
Worksheet Resource	ansfers you to the Suspended Floor as Output screen. This screen ials, Labour and Plant required for th	Clear span of floor joist I Joist centres I Width of floor I No of ends to generally have joist hangers No Additional no of joist hangers required No Number of trimmers No 1 No Length of trimmer No 1 No Number of trimmer No 2 No Length of trimmer No 2 No Perimeter of floor to receive sealing I Ceiling plastered? Y/ Plastering decorated? Y/ Insulation? Y/ Insulation overlap to ceiling edge I No of ends strapped (0, 1 or 2) No	M 3.400 M 0.400 M 2.200 M 2.000 M - M - M - M - M - M - M - M - M - M - M - M - M - M - M - M - M 0.100 M 0.100 M 2.000
Resource Resource + Summary Price Boo	Ikit Tools/Options Image: Stress of the second s	Purchase Purchase Production/ Estimate Unit Cost Phase Usage Factor Rate Unit MT £ 5:90 First Floor Joists 1.00000 £ 5:90 I MT £ 5:90 First Floor Joists 1.00000 £ 5:90 I	Waste t Factor Type 4 7.50% Carcasing Timber 4 7.50% Carcasing Timber 9 7.50% Metalwork
Floor joist straps Floor joist hangers Floor joist boots Floor trimmer No 1 Floor trimmer No 2 Joist Hangers for trimmers	Lateral Restraint Strap 30 x 5 x 1200mm bent at 150mmm Joist Hanger 50mm Standard Leg Joist Boot Sawn Dry Graded Structural Softwood 75.0 x 200mm Sawn Dry Graded Structural Softwood 75.0 x 200mm Heavy Duty Joist Hanger 75 x 200mm	EA £ 2.00 First Floor Joists 1.00000 £ 2.00 N EA £ 5.00 First Floor Joists 1.00000 £ 5.00 N0 MT £ 11.00 First Floor Joists 1.00000 £ 11.00 First Floor Joists MT £ 11.00 First Floor Joists 1.00000 £ 11.00 First Floor Joists	o 7.50% Metalwork o 7.50% Metalwork o 7.50% Roofing Sundries

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

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

Close

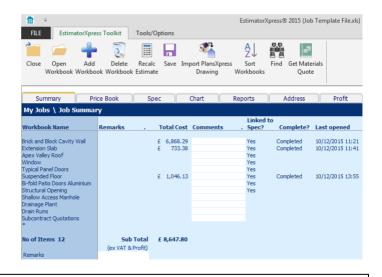
Note the summary price for your Suspended Floor has been updated.

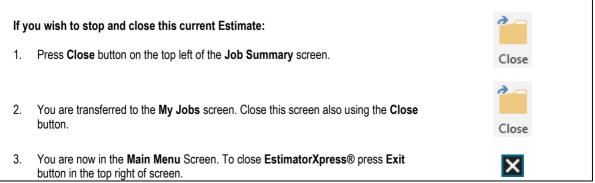


[21] To return back to Job Summary, press the Close Workbook button. This will automatically save your Suspended Floor Workbook.

[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.





15.00 Minutes

APEX VALLEY ROOF

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:

lf you	u wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
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.	Open Estimate

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.

💼 ÷				Estimator/	press® 2015 (Job
FILE EstimatorXpre	ess Toolkit Tools/O	ptions			
籠 🛥 🕂	. 🧕 🔳		*	Az↓	
Close Open Add Workbook Workbo	Delete Recalc ook Workbook Estimate		oort PlansXpress Drawing	Sort Workbooks	Find Get Mater Quote
Summary Pri	ice Book Spe	c	Chart	Reports	Address
My Jobs \ Job Summa	ry				
Workbook Name	Remarks .	Total Cost	Comments	Linked . Spec?	to Complete?
Brick and Block Cavity Wall Extension Slab Apex Valley Roof Window Fyoical Panel Doors		£ 6,868.29 £ 733.38		Yes Yes Yes Yes Yes	Completed Completed
i ypical Panel Doors Suspended Floor 3I-fold Patio Doors Aluminium Structural Opening Shallow Access Manhole Drainage Plant Drain Runs Subcontract Quotations		£ 1,046.13		Yes Yes Yes	Completed
No of Items 12	Sub Total (ex VAT & Profit)	£ 8,647.80			
Remarks	(ex var a Pronty				
EstimatorXpre	ss® 2015				
	orksheet name f	for this /	Apex Valley	Roof.	
Enter a Wo					
Enter a Wo Name	Extension Roof	F		✓ 0	к

[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**.

® 2015

Select the default Wall Width to Use in the Wizard. 0.300 - Brick and Block Cavity Wall, External Walls, Wall 1 and 2

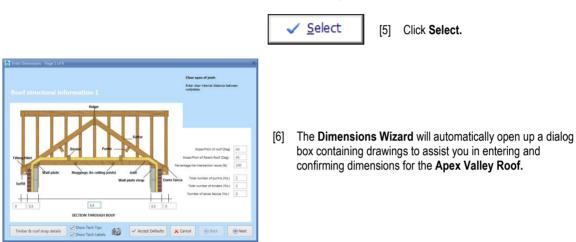
Select a Dimensional Template, or click Edit to create your own

Tiled roof with fascias and barge boards. insulation and plastering to ceiling

Tiled roof with fascias and barge boards. insulation and plastering to vaulted ceiling Tiled roof without fascias and barge boards, insulation and plastering vaulted ceiling 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.



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:

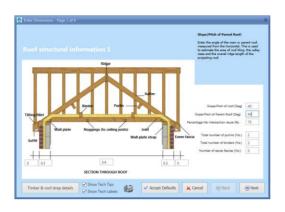
-

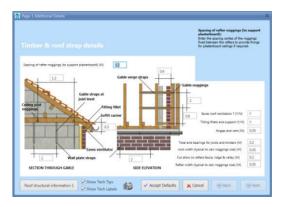
✓ Select

🔗 <u>E</u>dit

× Cancel

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





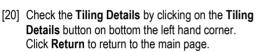


- [8] Assuming the **Wall Widths** are correct, press the **Enter** key twice to move the cursor to the **Clear Span of Joists** cell and type 3.4 and press **Enter** (there is no need to type in unit m).
- [9] Next, press Enter again a couple of times until your cursor is in the cell labelled Slope/Pitch of Roof. Enter 40 (no need for unit °) and press Enter.
- [10] Enter 40 for the Slope/Pitch of Parent 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.

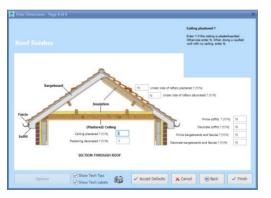
74 Tutorial Apex Valley Roof



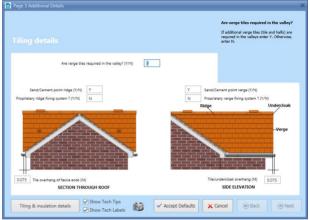
[19] As before, review and modify any of the dimensions relating to tiling and insulation, note that Length of the Abutment is zero as the gable end of the roof is not abutting a wall. The lead valley is automatically calculated by EstimatorXpress®.



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



[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.



- [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.

FILE EstimatorXpress Toolkit Tools/Options		EstimatorXpress® 2015 (Apex Valley Roof.xis) - Job 19: Mr Phililips, (Extension 01
Close Add Copy Delete Dims View Resources P Column Column Wizard Output	Resources Wizard	iters	
Summary Price Book Spec	Chart	Filter Input Filter screen to show the user entered information.	pare
My Jobs \ Job Summary \ Apex Valley Roof \ Ext £ HP Phillips 4,252.56	tension I	Filter Material Quantities Filter screen to show the material quantities calculated by EstimatorXp Use this button to view timber cutting lists where available.	ress.
Per Valley Roof Extension Roof Location	Tiled roof insu	Clear Filter Clear any Filter currently applied.	
Approx.dep (red) plant M Approx.dep (red) plant M		7 0 3.6 25.00 Sem Dry Gedef Shutcher 24 0 3.05 and Shutcher Shutcher 14 0 2.87 40.27 Sem Dry Gedef Shutcher 14 0 2.87 10.20 Sem Dry Gedef Shutcher 6 0 2.87 17.35 Sem Dry Gedef Shutcher 2 0 5.50 Sem Dry Gedef Shutcher Sem Dry Gedef Shutcher 2 0 5.50 Sem Dry Gedef Shutcher Sem Dry Gedef Shutcher 2 0 5.49 7.00 Sem Dry Gedef Shutcher 4 0 5.494 7.00 Sem Dry Gedef Shutcher	Treated 47.0 x 50mm al Softwood 47.0 x 125mm Treated 47.0 x 50mm al Softwood 47.0 x 125mm al Softwood 47.0 x 125mm Treated 47.0 x 50mm x 33mm al Softwood 75.0 x 100mm al Softwood 75.0 x 120mm al Softwood Treated 75.0 x 123 al Softwood Treated 25.0 x 150

EstimatorXpress® Tutorial



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

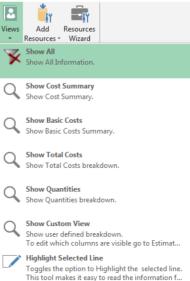
EstimatorXpress® then transfers you into the Apex Valley Roof Resources Output screen. Scroll down and across the screen with the scroll bars to see all the information relating to the Materials, Labour and Plant.

FILE EstimatorXpress Toolkit Tools/	EstimatorXpress® 2015 (Aper	v Valley Roof.xls) - Job 19: Mr Phililips, E	Extension	7	VL
Back Change Edit Markers Views	Add Resources ources * Wizard				4
Summary Price Book S	pec Chart Reports Address	Profit Inflation	Compare		
My Jobs \ Job Summary \ Apex Valley	Roof \ Extension Roof - Dims \ Extension Roof - Re	sources			
No. of Groups of Roofs Total Cost of Groups	1.00 £ 4,252.50				
Item used for:	Mr Phililips Description	Purchase Purchase Build Unit Cost Phase	Production/ Usage Factor		Was Unit Fac
Apex valley roof joists	Sawn Dry Graded Structural Softwood 47.0 x 150mm	MT £ 4.40 Roof Structure	1.00000		
Noggings between roof joists	Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT £ 2.00 Roof Structure	1.00000		
Apex valley roof rafters	Sawn Dry Graded Structural Softwood 47.0 x 125mm	MT £ 3.50 Roof Structure	1.00000	£ 3.50	M 7.5
Apex valley roof rafters Noggings between rafters	Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure	1.00000 1.00000		
				£ 2.00	M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters	Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure	1.00000	£ 2.00 £ 3.50	M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings	Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kiln Dried Treated 47.0 x 50mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure	1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00	M 7.5 M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Soffit carriers	Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 2.00 Roof Structure MT £ 2.00 Roof Structure MT £ 0.60 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60	M 7.5 M 7.5 M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Soffit carriers Wall plate	Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm Sawn Batten Treated 25.0 x 38mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 0.60 Roof Structure MT £ 2.00 Roof Structure MT £ 5.70 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60 £ 5.70	M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5
Nogangs between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder nogangs Sofit carriers Wall plate Purfins to valley roof	Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Britten Treated 25.0 x 38mm Sawn Dry Graded Structural Softwood 75.0 x 100mm Sawn Dry Graded Structural Softwood 77s.0 x 225mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 0.60 Roof Structure MT £ 5.70 Roof Structure MT £ 15.00 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60 £ 5.70 £ 15.00	M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Softit carriers Wall plate Purlins to valley roof Valley lay boards	Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm Sawn Dry Graded Structural Softwood 75.0 x 100mm Sawn Dry Graded Structural Softwood Treated 75.0 x 225mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 0.60 Roof Structure MT £ 5.70 Roof Structure MT £ 5.00 Roof Structure MT £ 5.00 Roof Structure MT £ 2.60 Roof Structure MT £ 2.60 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 2.00 £ 0.60 £ 5.70 £ 15.00 £ 2.60	M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Soffit carriers Wall plate Purfins to valley roof Valley lay boards Valley boards	Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm Sawn Dry Graded Structural Softwood 75.0 x 100mm Sawn Dry Graded Structural Softwood Treated 25.0 x 225mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 2.00 Roof Structure MT £ 5.00 Roof Structure MT £ 5.00 Roof Structure MT £ 15.00 Roof Structure MT £ 2.60 Roof Structure MT £ 2.60 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60 £ 5.70 £ 15.00 £ 2.60 £ 2.60	M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Soffit carriers Wall plate Purlins to valley roof Valley lay boards Valley boards Valley boards Tile underdoak valley strip	Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kin Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm Sawn Dry Graded Structural Softwood 75.0 x 100mm Sawn Dry Graded Structural Softwood Treated 75.0 x 225mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 0.60 Roof Structure MT £ 5.70 Roof Structure MT £ 15.00 Roof Structure MT £ 2.60 Roof Structure MT £ 2.60 Roof Structure MT £ 0.60 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60 £ 5.70 £ 15.00 £ 2.60 £ 2.60 £ 0.60	M 7.5 M 7.5
Noggings between rafters Apex valley roof gable ladder rafters Apex valley roof intersection rafters Gable ladder noggings Soffit carriers Wall plate Purlins to valley roof Valley lay boards Valley lay boards Valley boards	Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Dry Graded Structural Softwood 47.0 x 125mm Sawn Softwood Kiln Dried Treated 47.0 x 50mm Sawn Batten Treated 25.0 x 38mm Sawn Dry Graded Structural Softwood 75.0 x 100mm Sawn Dry Graded Structural Softwood Treated 25.0 x 225mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm Sawn Dry Graded Structural Softwood Treated 25.0 x 150mm	MT £ 2.00 Roof Structure MT £ 3.50 Roof Structure MT £ 3.50 Roof Structure MT £ 2.00 Roof Structure MT £ 2.00 Roof Structure MT £ 5.00 Roof Structure MT £ 5.00 Roof Structure MT £ 15.00 Roof Structure MT £ 2.60 Roof Structure MT £ 2.60 Roof Structure	1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	£ 2.00 £ 3.50 £ 3.50 £ 2.00 £ 0.60 £ 5.70 £ 15.00 £ 2.60 £ 2.60 £ 0.60	M 7.5 M 7.5

[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].



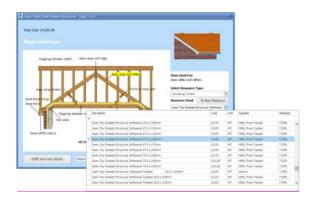
† =				EstimatorX	press® 2015 (Apex \	/alley Roof.x	ls) - Job 19	: Mr Phililips
FILE Estima	atorXpress Toolkit	Tools/Options						
Back Change Resource R	Edit Markers Vie Resource	ws Add Resources *	Resources Wizard					
Summary	Price Book	Spec	Chart	Reports	Address	Profit	I	nflation
My Jobs \ Job S	Gummary \ Apex \	/alley Roof \	Extension Ro	of - Dims \ Exte	nsion Roof - Res	ources		
No. of Groups of Ro	ofs				1.00			
Total Cost of Group		£			4,252.56			
			Phililips			Purchase		
Item used for:			cription			Unit		Phase
Apex valley roof jo				uctural Softwood 47.0 Iried Treated 47.0 x 50		MT MT		Roof Structu Roof Structu
Noggings between roo Apex valley roof ra				uctural Softwood 47.0 x 50		MT		Roof Structu Roof Structu
Nongings between raf				ried Treated 47.0 x 5				Roof Structu

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.



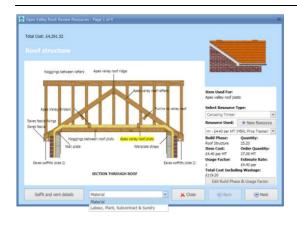
[28] Click the Resources Wizard button in the top right of the toolbar.

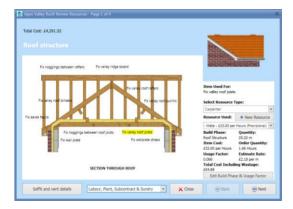
[29] A dialog will pop up which will allow you to review and change any item of Material, Labour, Plant and Sundry that is being used inside the Worksheet. Click on the Apex Valley Roof Rafters label. Notice that this item is now highlighted in yellow.

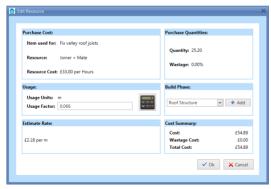


- [30] On the right hand side of the dialog you will see that the Resource Used i.e. Sawn Dry Graded Structural Softwood 47.0 x 125mm and also the Cost, Estimate Rate, Total Item Cost and Order Quantity are also displayed here for this product. To change the Resource Used, simply select a different timber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









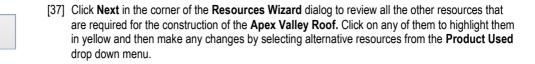
TIP: To help you work out what **Usage Factor** you should enter, click on the **Usage Factor Calculator** button.

- [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.

Workings:	
It takes 1 Hours It for the 'Joiner + Mate	2'
to do 15.1515 M of 'Fix valley roof joists'.	
Estimates:	Usage Factor:
1.66 Hours for the Joiner + Mate to do this job of 25.20 m at a cost of £54.89	
23-03	0.0660
	0.000





Back

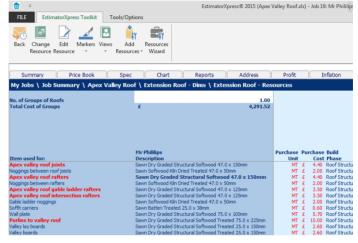
Close

Next

- [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.

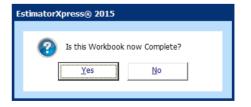




[41] Note the price in the Summary of Apex Valley Roof.

- [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.



lf yo	u wish to stop and close this current Estimate:	
1.	Press the Close button on the top left of the Job Summary screen.	Close
2.	You are transferred to the My Jobs screen. Close this screen also using the Close button.	Close
3.	You are now in the Main Menu Screen. To close EstimatorXpress ® press the Exit button in the top right of screen.	×

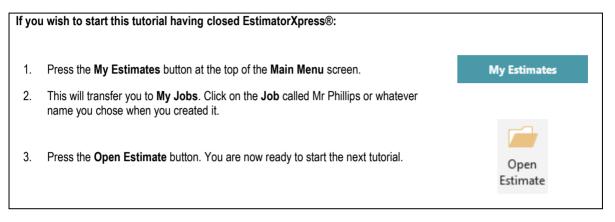
STRUCTURAL OPENING



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.

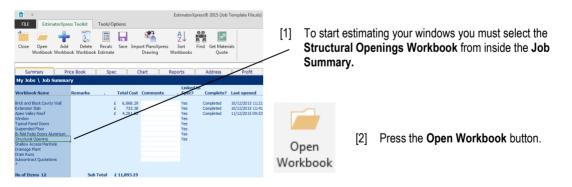
If you have joined this tutorial after having closed EstimatorXpress®, see the following steps.



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.



- 💼 - 👳				Estimator	Xpress® 2015 (Struct	ural Opening.xls)
FILE EstimatorXpress Too	lkit Tools/Op	otions				
🎽 🗀 🕂	D 💽					
Close Open Add Worksheet Worksheet W	Copy Delete orksheet Workshe					
Summary Price Bo	ok Spec	: Cł	hart	Reports	Address	Profit
My Jobs \ Job Summary \ S	Structural Ope	ning				
List of worksheets in workbook						
Sheet Name	Remarks .	Location	. Tot	al Cost	No. of Identical op	enings
Large Opening (3.6-4.2m)		House	£	1,171.53		1.000
Medium Opening (3.0 - 3.6m)		House	£	979.44		1.000
Small Opening (2.4-3.0m) *		House	£	844.71		1.000
			£	2,995.68		
Remarks						

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.

- 📅 - 👻	Estimator
FILE EstimatorXpress Toolkit To	ols/Options
Close Add Copy Delete Dims Vi Column Column Column Wizard	iew Resources Resources Filters Output Wizard
Summary Price Book	Spec Chart Reports
My Jobs \ Job Summary \ Structura	l Opening \ Small Opening (2.4-3.0m)
£ <u>Hr Phillips</u> Structural Opening Small Opening (2.4-3.0m)	844.71
Description	Units
Opening Width	M 2.400
Opening Height	M 2.100
Reveal Depth	M 0.275
Lintel(s) bearing (each end)	M 0.275 M 0.150
Wall thickness (if opening formed to calculate spoil)	
Bulking factor for spoil	No. 2.000
No of bricks required at each end	No. 6.000
Are padstones required?	Y/N Y
No of slates required for packing Spacing of noggings to steels	No. 4.000 M 0.400
Length of noggings to steels	M 0.300
conger of noggings to steels	0.500
Are reveals plastered?	Y/N Y
Are reveals to be painted?	Y/N Y
No of angle beads required (0,1 or 2)	No. 2.000

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**.

82 Tutorial Structural Opening

Enter Dimensions - Page 1 of 2	g details		Opening Width: Enter the structural opening width.
0.275 Brick or pa	c patching adstones	0.15	
	Lintel		— Lintel end bearing — Concrete padstone
Reveals	2.1		Are padstones required? (Y/N) Y No of bricks required at each end (No.) 6 No of states required for packing (No.) 4
SECTION THROUGH WALL	STRUCTURAL OPENING ELEV.	ATION Wall thick	Bulking factor for spoil (No.) 2 ness (if opening formed to calculate spoil) (M) 0.275
Options	Show Tech Tips	✓ Accept Defaults	; X Cancel 💿 Back 🕥 Next

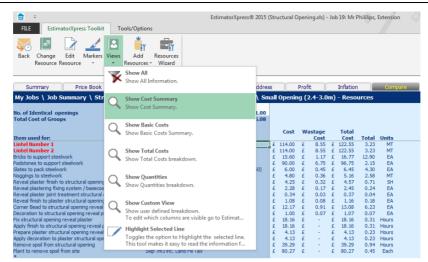
[10] Confirm Bulking Factor for Spoil of 2.

- [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.
- Confirm the Lintel Bearing (each end) of 0.150. [8]
- [9] Confirm whether Padstones are required, the number of bricks required to form them and the number of slates required for packing.

- [12] Click Next. 0.4 [13] Confirm the Length of noggings to steel. [14] Confirm that Reveals are to be Plastered and Painted. STRUCTURAL OPENING ELEVATION Show Tech Tips ✓ Accept Defaults X Cancel 1 📀 Back ✓ Finish Show Tech Labels 🗄 = EstimatorX FILE EstimatorXpress Toolkit Tools/Options -19 Bt Copy Delete Dims View Resources Resources Filters Close Add Column Column Column Wizard Output Wizard Summary Price Book Spec Chart Reports My Jobs \ Job Summary \ Structural Opening \ Small Opening (2.4-3.0m) 886.08 Mr Phililips Structural Opening Small Opening (2.4-3.0m) Location Standard Opening View Resources Description Unit Output Opening Width 2.700 Opening Height 2.100 Reveal Depth 0.275 Lintel(s) bearing (each end) M 0.150 0.275 Wall thickness (if opening formed to calculate spoil) Bulking factor for spoil 2.000
- [11] Enter the Wall Thickness of 0.275 (NOTE: This is the width of the existing wall).

- [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.

EstimatorXpress® Tutorial



[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.



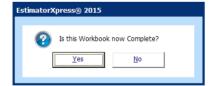
[20] Press the Close button to return to the Summary of Structural Openings Workbook

Close

Close

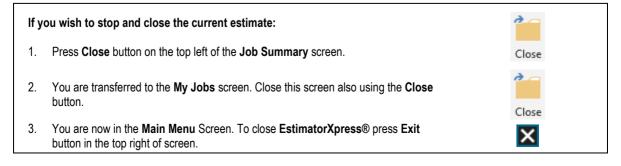
A

[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**.



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.

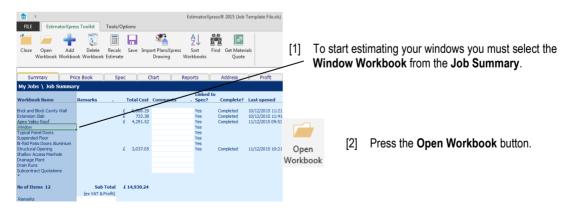
If you have joined this tutorial after having closed EstimatorXpress®, see the following steps.

lf you	wish to start this tutorial having closed EstimatorXpress®:	
1.	Press My Estimates button at the top of the Main Menu screen.	My Estimates
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.	Open Estimate

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.



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.

Es	stimatorXpro	ess® 2015	
	Enter a W	orksheet name for this Window.	
	Name	1800 x 1200	<u>✓ о</u> к
	Location	Front Extension 💌 🔹	X Cancel

[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.



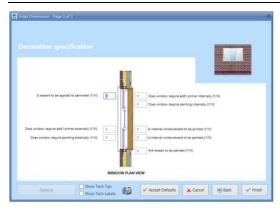
[6] Click anywhere in the column of dimensions and press the **Dims Wizard** button.

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.

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[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.



Output

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.

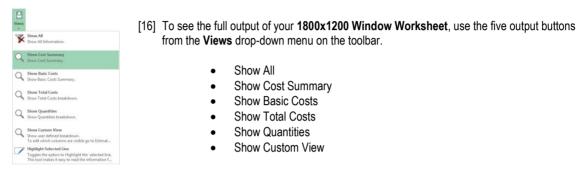
Click on the Window itself and then in the Markers drop-down menu, select Not Required. The Window will change to Not Required and the Total Cost of the Worksheet will be automatically recalculated to deduct the associated cost.

FILE Estimator/Xeress Toolkit Tools/Options	EstimatorXpress® 2015 (Wind	ow.als) - Job 19: Mr Phililip	s, Extension	RU	John Rees - D
File EstimatorXpress Toolkit Tools/Uptions					John Kees
Back Change Edit Markers Views Add Resources Resource Resource • Resources • Resources					
Not Required					~
Not Required Mark a Resource as Not Required.					
Summary Pri	ports Address	Profit Inflation	Compare		
My Jobs \ Job Summar	1200 - Resources				🕜 Help & Support
	1200 - Resources				nep & support
Mark a Resource as Included in					
No. of Identical windows Subcontract. Total Cost of Groups	1.00				
Total Cost of Groups	655.01				
Mark a Resource as Included in Timber		Purchase Purchase Bu	id Production/	Estimate	Waste
Item used for: Mark a Kesource as included in Timber Frame.		Unit Cost Ph			Factor Type Resource
Apply window reveal and oil fin		Hours £ 58.00 Play		£ 9.57 M2	Plasterer Labour
Prepare window plaster reveals To Be Defined			emal Decoration 0.12100	£ 2.18 M2	Decorator Labour
Apply decoration to window pla Mark a Resource as To Be Defined.			ernal Decoration 0.12100	£ 2.18 M2	
Prepare window board for deco			emai Decoration 0.07700	£ 1.39 M	Decorator Labour
Apply primer for window board			emai Decoration 0.07700	£ 1.39 M	
Apply undercoat for window bo Critical			ernal Decoration 0.07700 ernal Decoration 0.07700	£ 1.39 M	
Apply paint for window board Prepare int, of window for prim			ernal Decoration 0.07700 ernal Decoration 0.19800	£ 1.39 M £ 3.56 M2	Decorator Labour Decorator Labour
Apply primer to interior of winds			emai Decoration 0.19800 emai Decoration 0.19800	£ 3.56 M2	
Apply undercoat to interior of # Clear Modified Marker			ernal Decoration 0.19800	£ 3.56 M2	
Clear Modified Marker			emai Decoration 0, 19800	£ 3.56 M2	
Clear modified marker from a Resource		Hours & 18.00 Ext	ernal Decoration 0.22000	£ 3.96 M2	Decorator Labour
Apply primer to exterior of wine A Resource is marked as modified wh.			ernal Decoration 0.22000	£ 3.96 M2	Decorator Labour
Apply undercoat to exterior of window Decorator			ernal Decoration 0.22000	£ 3.96 M2	
Apply gloss to exterior of window Decorator			ernal Decoration 0.22000	£ 3.96 M2	
Plant to remove spoil from site Skip 7m3 inc. Land Pill Tax		Each £ 180.00 Str	uctural Openings 0.14300	£ 25.74 M3	Spoil removal Plant
		No	40		
Sundry Items		No	40		
Sundry Items		1 100 0 000	invest Chail 1 00000	6 Euch	Condex Material Material

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.

Summary	Price Book	Spec	Chart	Reports	Address	Profit	:)[Inflation
My Jobs \ Job S	ummary \ Windov	v \ 1800 x 12	200 - Dims \	1800 x 1200 - R	esources			
No. of Identical win	idows				2.00			
Total Cost of Group	5	£			1,314.60			
		Mr Phi	ililips			Purchase Pu		
Item used for:		Descri	iption			Unit	Cost	: Phase
Window fixings to side	S	Hamm	ner in Fixing 8r	nm x 100mm (12 B	lag)	PK £	3.20	Joinery 1st Fix
Nindow fixings to top a	and bottom	Wood S	Screws Steel CSK	Twin Thread 10 x 3 ir	nch (100 box)	BX £	5.80	Joinery 1st Fix
Sealant to sides and to	on of window	All Purn	ose Silicone Whi	te 0.31Litre		EA £	3,40	External Decora





[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.

EstimatorXpress® 2015	<u> </u>
Is this Workbook now Complete?	Clos

[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**.

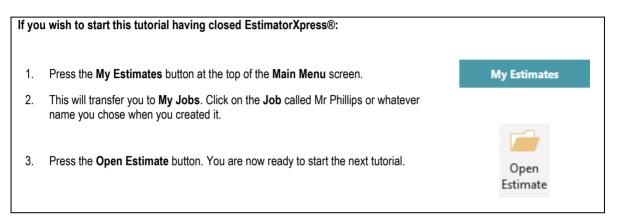
lf yo	u wish to stop and close the current estimate:	
1.	Press the Close button on the top left of the Job Summary screen.	Close
2.	You are transferred to the My Jobs screen. Close this screen also using the Close button.	Close
3.	You are now in the Main Menu Screen. To close EstimatorXpress ® press the Exit button on the top right of screen.	×

TYPICAL PANEL DOORS



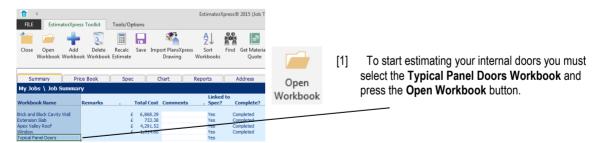
If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

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



If you 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 =					Estimator	(press® 2015 (Ty	рісаї Ра
FILE Estimat	torXpress Tool	kit Tools/Opti	ons				
🎦 📄	+	D 💽					
Close Open	Add C	Copy Delete	Save As	Change			
Worksheet \	Worksheet Wo	rksheet Worksheet					
Summary	Price Boo	k Spec	Cha	irt 📃	Reports	Address	
My Jobs \ Job St	ummary \ T	voical Panel Doo	ors				
ist of workshaats i	in workbook						
		Remarks .	Location	. Tota	l Cost	No. of Identical	doors
Sheet Name						No. of Identical	
5heet Name 762 Door Into Studding	,		Jpstairs	£	I Cost	No. of Identical	doors -
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5heet Name 762 Door Into Studding 864 Door into Studding 762 Door into Blockworl 864 Door into Blockworl 866 Door into Studding 510 Door into Studding	3 k k		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs	E E E	:	No. of Identical	1.000
Sheet Name 762 Door Into Studding 764 Door into Studding 762 Door into Blockwori 864 Door into Studding 100 Door into Studding 100 Door into Studding	2 		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs Downstairs	E E E E	369.57	No. of Identical	1.000
List of worksheets i Sheet Name 762 Door Into Studding 762 Door Into Studding 762 Door Into Blockworl 864 Door Into Studding 510 Door Into Studding 510 Door Into Studding 610 Door Into Studding 610 Door Into Blockworl	2 		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs	E E E	369.57	No. of Identical	
Sheet Name 762 Door Into Studding 762 Door into Studding 762 Door into Blockwor 564 Door into Blockwor 586 Door into Studding 510 Door into Studding 586 Door into Blockwor	2 		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs Downstairs	E E E E	369.57	No. of Identical	
Sheet Name 762 Door Into Studding 764 Door into Studding 762 Door into Blockwori 864 Door into Studding 100 Door into Studding 100 Door into Studding	2 		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs Downstairs	E E E E	- 369.57 - - - - -	No. of Identical	
Sheet Name 762 Door Into Studding 762 Door into Studding 762 Door into Blockwor 564 Door into Blockwor 586 Door into Studding 510 Door into Studding 586 Door into Blockwor	2 		Jpstairs Jpstairs Downstairs Downstairs Jpstairs Jpstairs Downstairs	E E E E	369.57	No. of Identical	

[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.

Open Worksheet

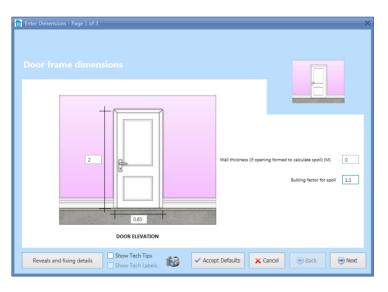
EstimatorXpress® then transfers you into the Dimensions section of the Typical Panel Door Door into Blockwork Worksheet.

[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.



Wizard

[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.

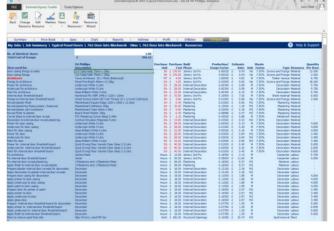
[11] Ensure that the reveals are to be plastered, add a threshold board and 2 angle beads. Click Next.

Enter Dimensions - Page 3 of 3 Decoration specification		[12] On the final screen, confirm the finishes you require for the internal door including painting the reveals.
DOOR PLAN VIEW Is threshold board to be primed (Y/N) Is threshold board to be painted (Y/N) Y Number of archtraves Architraves fixing centres (M) Are architraves to be primed (Y/N) Y Are architraves to be primed (Y/N) Y	Does door casing require add1 primer (Y/N) Y Does door casing require painting (Y/N) Y Does door require add1 primer (Y/N) Y Does door require painting (Y/N) Y Are reveals to be painted (Y/N) Y	[13] Click Finish to return to the Typical Panel Doors Worksheet Dimensions screen showing all the dimensions you have just entered.
Options Show Tech Tips	✓ Accept Defaults	

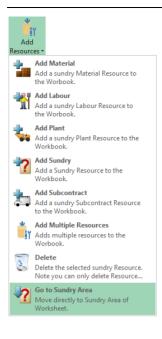
You now need to ensure we have allowed for the lintels since there are two leafs to the existing wall to be supported. Because these items are not automatically calculated from dimensions, only one lintel is included as default. You need to add a second one to the sundries section of the **Workbook**.

[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**.



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

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.

5 DDDHIFFFFFFFFFPP*

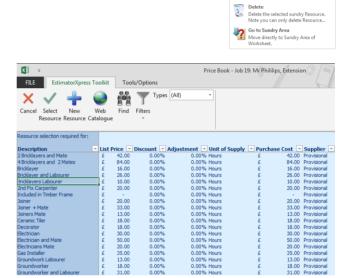
[18] Click on the white cell in the row called Fix Lintel and change the hours to 4 in the Quantity Required Column and then press Enter.

Sundry Items			
Door	Internal Door 6 Panel Textured Undercoated 762 × 1981mm	Material	1.000
Door casing	Unprimed 138 × 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.



Add

Add Material Add a sundry Material Resource to the Worbook. Add a sundry Labour Resource to the Worbook.

Add Subcontract Add a sundry Subcontract Resource to the Workbook. Add Multiple Resources Adds multiple resources to the Workhook

Add Plant Add a sundry Plant Resource to the Workbook. Add Sundry Add a Sundry Resource to the

Workbook.

[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.

Item used for: Form Opening Resource: Bricklayers Labourer Resource Cost: £10.00 per Hours Usage: Usage: But Heave Units: Houre Add	urchase Quantities: Quantity: 4 Wastage: 0.00%
Item used for: Form Opening Resource: Bricklayers Labourer Resource Cost: £10.00 per Hours Usage: Usage: Usage Units: Hours V Add	Quantity: 4 Wastage: 0.00%
Resource: Bricklayers Labourer Resource Cost: £10.00 per Hours Usage: Bu Usage Units: Hours Y + Add	Wastage: 0.00%
Resource: Bricklayers Labourer Resource Cost: £10.00 per Hours Usage: Bu Usage Units: Hours Y + Add	Wastage: 0.00%
Usage: Bu Usage Units: Hours V + Add	
Usage Units: Hours V + Add	
·····	External Works 1 💌 🕈 Add
Estimate Rate: Co	ost Summary:
	Cost: £40.00
£10.00 per Hours	Wastage Cost: £0.00
	Total Cost: £40.00
	V Ok X Cancel

Tutorial Typical Panel Doors 93

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 £		Joinery 1st Fix
Door furniture	JEWSON Georgian Polished Brass Internal Latch Pack	EA £		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 £		Brickwork Shell
Form opening	Bricklaver	Hours £	16.00	Brickwork Shell
Form opening	Bricklayers Labourer	Hours £		Brickwork Shell
Fix lintel	Bricklaver			Brickwork Shell
Fix door casing	Joiner			Joinery 1st Fix
Hang door	loiner			Joinery 2nd Fix
Fix door furniture	Joiner	Hours £		Joinery 2nd Fix
Return to ease door	Joiner			Completion
Plant for forming opening (1)	Not required	Unit £		Structural Openings
Plant for forming opening (2)	Not required	Unit £		Structural Openings
*	nociequieu	Offic E	-	buldetai ai 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.

EstimatorXpress® 2015	[27] A dialog box pops up asking if the item is now complete. Click Yes
Is this Workbook now Complete?	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 .

lf you	u wish to stop and close the current estimate:	
1.	Press the Close button on the top left of the Job Summary screen.	<u>à c</u>
		Close
2.	You are transferred to the My Jobs screen. Close this screen also using the Close button.	<u>è</u>
	buton.	Close
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:

lf yo	u wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
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.	Open Estimate

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**.

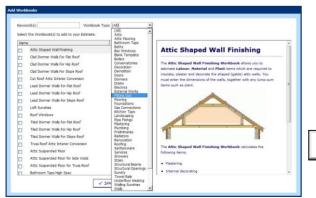
The **Bathroom & Cloaks Workbook** is an example of a **Composite Workbook** (see page 19 for an explanation of this). It is simply a collection of items of **Labour**, **Material** and **Plant** required to fit out various different bathrooms and cloakrooms. You should review each item to see if they 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**.

Select

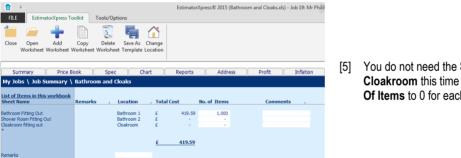


- [2] Select the **Workbook Type** of **Fiting Out** from the Workbook Type dropdown at the top of the dialog box.
 - [3] Click the checkbox next to Bathroom and Cloaks in the dialog box that pops up and press the Select button.

Summary	Delete Recalc Save Import PlansXpres Dok Workbook Estimate Drawing	EstimatorXpress® 2015 (Job Tem Z J Pind Get Materials Workbooks Ind Get Materials Reports Address	You will see that the Bathroom & Cloaks Workbook has been added to the list of Workbooks in the Job Summary.
My Jobs X Job Summa Workbook Name Belden di Kock Conity Wal Estesson Gab Apex Valley Kock Conity Wal Apex Valley Kock Annue My Cook Annue Sugended Floor Sugended Floor Sug	Fremarks Total Cost Comments £ 6,668,33 £ £ 7,73,38 £ £ 4,20,152 £ £ 1,314,60 £ £ 4,33,08 £ £ 4,3037.05 £ Sub Total £ 16,678.81	Linked to Spec? Complete? Las Yes Completed 10/ Yes Completed 11/ Yes Completed 11/ Yes Completed 11/ Yes 11/ Yes 11/ Yes 11/ Yes 11/	[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 Worksheets 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 **Specifications** 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.

Open Worksheet

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

💼 =		Estimat	orXpress®	2015 (Bath	room and Cloaks.xl	s) - Job 19: Mr P	hililips, Exte	nsion 🔘 / 📼	
FILE EstimatorXpre	ss Toolkit Tools/Options								
Close Change Edit Resource Resource	Markers Views Add Resources * Resources Wizard								
Summary Pri	ce Book Spec Chart	Reports		Address	Profit	Inflation	Co	mpare	
My Jobs \ Job Summar	γ \ Bathroom and Cloaks \ Bathroom Fitt	ing Out	t - Resou	rces					
No. of Items		1.00							
Total Cost	£	1.00							
Item used for:	Mr Phillips Description		Purchase		Build	Production/	Estimate	Unit	Waste Factor
Bathroom Suite	Bathroom Pack 3 Piece - Bath, Sink, Toilet (Allowance £	250)			Internal Fitting Out	1.00000	£ 250.00	Each	
Carcass to bath side	Sawn Softwood Kin Dried 47.0 x 50mm		MT		Internal Fitting Out	1.00000	£ 1.60	м	
Seal Bath Perimeter	All Purpose Silicone White 0.31Litre		EA		Internal Fitting Out	1.00000	£ 3.40	Tube	
Box in Soil Pipe in Bathroom	Sawn Softwood Kiln Dried 47.0 x 50mm		MT		Internal Fitting Out	1.00000	£ 1.60	Each	
Box in Soil Pipe in Bathroom Box in Soil Pipe in Bathroom	Hardwood Ply WBP 2440 x 1220 x 5.5mm General Screw and Nail allowance		SH Each		Internal Fitting Out Internal Fitting Out	1.00000	£ 51.00 £ 1.00	Sheet 1220 * 2440 Each	
Box in Soil Pipe and Bath sides	Joiner		Hours		Internal Fitting Out	1.00000	£ 1.00 £ 20.00	Hours	
Fit Rath Panel	loiner		Hours		Internal Fitting Out	1.00000	£ 20.00	Hours	
*									
Location	Bathroom 1			No.		8			
Remarks									

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.

a =		Estimat	torXpress®	2015 (Bathro	oom a	nd Clo	aks.xls) - Job	19: N	Ar Phil	lips, Extensi	on () /	a)	1
FILE EstimatorXpre	ss Toolkit Tools/Options													
Close Change Edit Resource Resource	Markers Views Add Resources Resources Wizard													
Summary Pri	ce Book Soec Chart	Report		Address		Profit			nflatic	00	Comp	210		
My Jobs \ Job Summai	y \ Bathroom and Cloaks \ Bathroom	Fitting Ou	t - Resou	rces										
No. of Items Total Cost	6	1.00												
Item used for:	Mr Phililips		Quantity	Total		Cost	Was			Total	_			
tem used for: lathroom Suite	Description Bathroom Pack 3 Piece - Bath, Sink, Tollet (Allowan	vra (250)	Per Item 1.000	Quantity 1.000	6 25	0.00		Cost 18.75		Cost 68.75	Quantity 1.00	Wastage 0.08	Total 1.08	Units
Carrass to hath side	Sawn Softwood Kin Dried 47.0 x 50mm	CC EEDDY	10.000	10.000			ŝ.	1.20		17.20	10.00	0.75	10.75	M
eal Bath Perimeter	All Purpose Silicone White 0.31Litre		1.000	1.000	£	3.40	£	0.25	6	3.66	1.00	0.08	1.08	EA
										17.20	10.00	0.75	10.75	M
	Sawn Softwood Kin Dried 47.0 x 50mm		10.000	10.000		6.00	6	1.20						
ox in Soil Pipe in Bathroom	Hardwood Ply WBP 2440 x 1220 x 5.5mm		0.500	0.500	£ 2	5.50	£	1.91	£	27.41	0.50	0.04	0.54	
lox in Soil Pipe in Bathroom lox in Soil Pipe in Bathroom lox in Soil Pipe in Bathroom	Hardwood Ply WBP 2440 x 1220 x 5.5mm General Screw and Nail allowance		0.500	0.500	£ 2 £	5.50 5.00	E	1.91 0.38	£	27.41 5.38	0.50	0.38	5.38	SH Each
lox in Soil Pipe in Bathroom lox in Soil Pipe in Bathroom lox in Soil Pipe and Bath sides	Hardwood Ply WBP 2440 x 1220 x 5.5mm General Screw and Nail allowance Joiner		0.500 5.000 3.000	0.500 5.000 3.000	E 2 E 6	5.50 5.00 0.00	5	1.91	E :	27.41 5.38 50.00	0.50 5.00 3.00		5.38 3.00	Each Hours
ox in Soil Pipe in Bathroom ox in Soil Pipe in Bathroom ox in Soil Pipe and Bath sides	Hardwood Ply WBP 2440 x 1220 x 5.5mm General Screw and Nail allowance		0.500	0.500	E 2 E 6	5.50 5.00	11 11 11 11 11 11 11 11 11 11 11 11 11	1.91 0.38	E :	27.41 5.38	0.50	0.38	5.38	Each
lox in Soil Pipe in Bathroom lox in Soil Pipe in Bathroom	Hardwood Ply WBP 2440 x 1220 x 5.5mm General Screw and Nail allowance Joiner		0.500 5.000 3.000	0.500 5.000 3.000	E 2 E 6	5.50 5.00 0.00 0.00	£	1.91 0.38	E :	27.41 5.38 50.00 20.00	0.50 5.00 3.00	0.38	5.38 3.00	Each

[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.

Change Resource

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.

- - -	EstimatorXpress® 2015 (Bathroom and G	Cloaks.xls) - Job 19: Mr Phililij	ps, Extension
FILE Estimate	atXpress Toolkit Tools/Options		
× 🗸 =	Price Book - Job 19: N FILE Estimator/Xpress Toolk/t Tools/Options	Mr Phililips, Extension	7
Cancel Select M Resource Res			
Summary	Cancel Select New Web Find Filters Resource Resource Catalogue *		
My Jobs \ Job Su	Resource selection required for:	The prices quoted to you	are indicative, n
No. of Items Total Cost	Bath Panel 700mm Bath Panel 800mm	List Price ▼ Discount ▼ £ 12.00 0.00% £ 20.00 0.00%	0.00%
Item used for:	Bath Ungripped 2TH 1500mm x 700mm Bath Ungripped 2TH 1700mm x 700mm	£ 108.00 0.00% £ 108.00 0.00%	0.00%
Bathroom Suite	Bathroom Pack - Bath, Sink, Shower, Toilet (Allowance £150)	£ 150.00 0.00%	0.00%
Carcass to bath side	Bathroom Pack 3 Piece - Bath, Sink, Toilet (Alowance £250)	£ 250.00 0.00%	0.00%
Seal Bath Perimeter	Bow Fronted Bath 2TH 1200mm x 250mm	£ 368.00 0.00%	0.00%
Box in Soil Pipe in Bathro	Bow Fronted Bath Panel 1700mm	£ 38.00 0.00%	0.00%
Box in Soil Pipe in Bathro	Bow Fronted Bath Panel 750mm	£ 20.00 0.00%	0.00%
Box in Soil Pipe in Bathro	Cloakroom Pack - Sink, Tollet (Allowance £125)	£ 125.00 0.00%	0.00%
Box in Soil Pipe and Bath	Close Coupled Pan and Cistern (Allowance £100)	£ 100.00 0.00%	0.00%
Fit Bath Panel	Close Coupled Pan and Cistern (Allowance £250)	£ 250.00 0.00%	0.00%
•	Contemporary Freestanding Bath 1750mm x 790mm	£ 505.00 0.00%	0.00%
	Contemporary Freestanding Bath Feet	£ 131.00 0.00%	0.00%
Location	Deep Fill Bath 2TH 1700mm x 750mm	£ 210.00 0.00%	0.00%
	Digital Mixer Shower(Allowance £400)	£ 400.00 0.00%	0.00%
Remarks	Double Ended Bath 2TH 1800mm x 800mm	£ 368.00 0.00%	0.00%

[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

Close



[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.

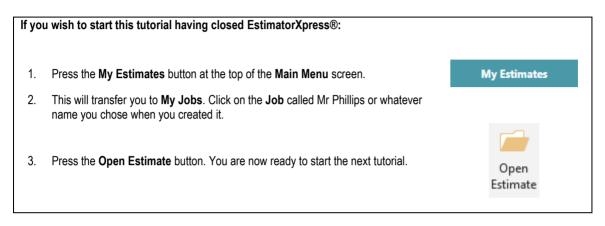
lf you	u wish to stop and close what you have estimated so far:	
1.	Press the Close button on the top left of the Job Summary screen.	Close
2.	You are transferred to the My Jobs . Close this screen also using the Close button.	Close
3.	You are now in the Main Menu Screen. To close EstimatorXpress ® press the Exit button on the top right of screen.	×

SUBCONTRACT QUOTATIONS

5:00 Minutes

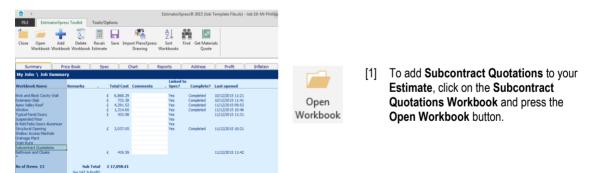
If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

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



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.



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.

	Tutorial Subcontract Quotations 99
Location Extension	bx pops up. he drop down box below to give the Subcontract Quotations a on. Select whatever location you think is most suitable e.g. sion. Click OK .
Image: Strange of the strange of th	[5] Now select Subcontract Quotations Open Worksheet Worksheet Worksheet buttom
	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.
Extransforgenesit 2025 Solecontract Questations.nel) - 86.9 20 M Philippe Extransion TELE Extransforgenesit Teach Questations and a second se	 [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**.

20

Close

Close

20

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

EstimatorXpress® 2015	
Is this Workbook r	now Complete?
Yes	No

[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.**

lf y	ou wish to stop and close what you have estimated so far:	2
1.	Press the Close button on the top left of the Job Summary screen.	Close
2.	You are transferred to the My Jobs . Close this screen also using the Close button.	Close
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.

lf yo	u wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
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.	Open Estimate

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.

Enter a Worksheet name for this Drain Runs. Name Extension Drains Location Extension	EstimatorXpress® 2015	
	Name Extension Drains	• <u>•</u>

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

EtimatorXpress Tooll ELE EstimatorXpress Tooll Close Add Copy Delete Column Column	Dims View	Resources Resou Nutput Wiz	rces Filters	atorXpress® 2015 (D	rain Runs.xls) - Jo	b 19: Mr Phililips, E
Summary Price Bool	c Sp	ec Ch	art Reports	Address	Profit	Inflation
My Jobs \ Job Summary \ D	ain Rune \	Extension Dr	aine - Dime			
£ 878. Mr Phililips Drain Runs Extension Drains	85 Location	Basic Drain run with no fittings				
Description	Units					
Length of drain run	M					
Midth of excavation	M					
Depth of excavation	M					
Depth of bedding material	M					
Depth of pipe cover material Depth of concrete protection	N					
	YAN					
Is excavated spoil used for backfill No of collars required	No.					
No of 87.5 degree bends required	No.					
No of 45.00 degree bends required	 No. 					
No of 22.5 degree bends required	 No. 					
No of 11.25 degree bends required	No					
No of drainage junctions required	 No. 					
No of rodding accesses required	No.					
No of gulleys required	No.	-				
No of back inlet gulleys required	No.	-				
No of pipe adaptors required	No.	-				
No of special pipe fittings	No.					
Bulking factor on spoil	No.	1.500				

 Image: Concernence on a segure 1 of 3

 Drainage details

 Note: Depth of dig is not the same as depth of draint:

 Image: Depth of dig is not the same as depth of draint:

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 Ima

💿 Next

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

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.**

Inter Dimensions - Page 2 of 3 × × Drainage details	[11] Enter Length of Drain Run 2.000.
2 Back fill material Concrete pipe protection	[12] Change Is Excavated Spoil used for Backfill to a Y. Leave the Bulking Factor as 1.5.
Pipe cover material Back y Back @ Next	[13] Click Next when you have completed this page.

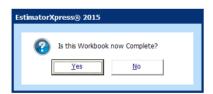
- [14] Now add the fittings required. Change the number of 87.5 degree bends required to 1 and leave the other fittings. They are not required for this short run.
- [15] Click **Finish** to return to the **Drain Runs Worksheet** screen showing all the dimensions you have just entered.



🗸 Finish

- [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.

Close Open Worksheet	Add Cop Worksheet Worksh		Save As Change Template Location					
Summary	Price Book	Spec	Chart	Reports	Address	Profit	Inflation	Compare
My Jobs \ Job S	Summary \ Drai	n Runs						
List of workshee Sheet Name	<u>sts in workbook</u>	Remarks	. Location	. Total Cos	t No. of	Groups of Item	s	Comments
Extension Drains			Extension	£	115.55	1.00	0	
	Φ				115.55			
Remarks				<u>r</u>	115.55			



[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.

Workbook

You are now transferred to Summary of Drainage Plant Workbook.

EstimatorXpress@ 2015 Enter a Worksheet name for this Drainage Plant. Name Extension Drainage Plant Location Extension	[2] A dialog box will pop up asking for a name and location for the Drainage Plant Worksheet. Enter Extension Drainage Plan similar and select Extension for location. Click OK.
	EstimatorXpress® will then transfer you to the Drainage Plant Extension Drainage Plant Work screen, where a dialog box will pop up asking you select a template.
Description Units Time require for excavator Days 2.000 Time require for showed Days 4.000 Time require for wheel barrow take Days 4.000 Time require for wheel barrow take Days 4.000	[3] Click on the Typical Plant Requirement and

JCB 3CX Ex

ter 12" Petro

4,000 4.000

4.00 4.00 4.00 4,000

4 000

matorXpress® will then transfer you to the nage Plant Extension Drainage Plant Worksheet en, where a dialog box will pop up asking you to ct a template.

Worksheet. Enter Extension Drainage Plant or

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.



Time required for excavator (Days)

Time required for shovel (Days)

uired for wheel barrow (Days)

required for trench compactor (Davs)

No of trench sheets required (No.)

Time required for trench sheets (Days) No of trench props required (No.)

Time required for trench props (Davs)

Time required for pipe cutter (Days) Time required for other sundry plant (Days)

Deliveries and collections of plant (No.)
PLANT REQUIRED FOR DRAINAGE

0.5

1

0

0

0

12

Show Tech Tips

[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.**

✓ Finish



[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.

Drainuge Plant Roview Resources - Page 1 Total Cast: 2229.70 Drainage plant and equi bases to a set				×			
Shovei for drains Wheelbarrow for drains Trench compactor for drains		Item Used For: Excevetor for drains Select Resource Typ Excevators		<u>_</u>			
Trench sheets for drains Trench props for drains			New Resource				
Pipe cutter for drains	Pecription T		Cost	Unit	Supplier	Wastage	
Other plant for drainage	Hi-Mac & Driver (Bhr. Day)		£225.00	Day	Provisional	0.00%	^
Deliveries and collections of plant	JCB 3CX Excavator & Driver (Brr. day) Mini Digger & Driver (8hr. day)		£225.00	Day Day	Provisional Provisional	0.00%	
Options			22,0000		- Consport		
							v

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.

Edit Resource	2
Purchase Cost:	Purchase Quantities:
Item used for: Excavator for drains	Quantity: 0.50
Resource: Mini Digger & Driver (8hr. day)	Wastage: 0.00%
Resource Cost: £250.00 per Day	
Usage:	Build Phase:
Usage Units: Days Usage Factor: 1	Drains 💌 🕈 Add
Estimate Rate:	Cost Summary:
£250.00 per Days	Cost: £125.00 Wastage Cost: £0.00 Total Cost: £125.00
	✓ Ok X Cancel



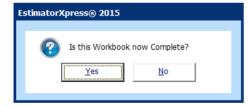
[15] Click the Finish button to close the Resources Wizard and automatically save your changes.



[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.

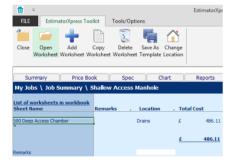
EstimatorXpress® 2015				
Select a location for the Location Extension	Worksheet.			

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.



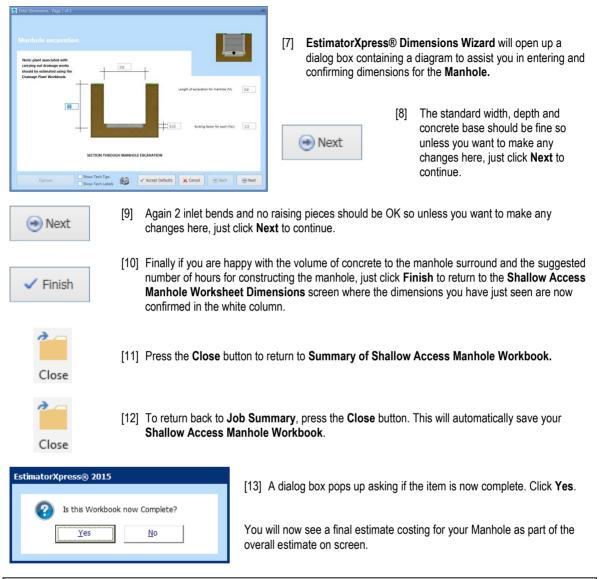


[4] Now select 600 Deep Access Chamber Worksheet and press Open Worksheet button.

- 曲 EstimatorXpress Toolkit Tools/Options Q - 1 Delete Dims View Resources Close Add Сору Resources Filters Column Column Column Wizard Output Wizard Price Book Chart Summary Spec My Jobs \ Job Summary \ Shallow Access Manhole \ 600 Deep 486 11 <u>Mr Phililips</u> Shallow Access Manhole 500 Deep Access Chamb Locatio Shallow access chambe Unit /idth of excavation for manho 0.600 0.600 th of excavation for manho 0.800 of 0.150 2.000 o of inlet bend No of raising pieces 2,000 Bulking factor for spoil 1.500 ved to construct manhole 4.000
 - [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.

Dims

Wizard



If you wish to stop and close the current estimate:

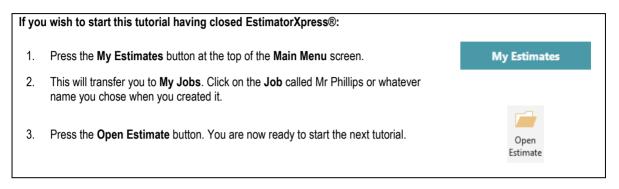
	button in the top right of screen.	×	
3.	You are now in the Main Menu Screen. To close EstimatorXpress® press the Exit		
	button.	Close	
2.	You are transferred to the My Jobs screen. Close this screen also using Close	ð.	
		Close	
1.	Press the Close button on the top left of the Job Summary screen.	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

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:



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**.

- 🗄 - 🔻				Estimator)	(press® 2015 (Job	Template File.xls) -	Job 19: Mr Phililip
FILE EstimatorXpres	s Toolkit Tools/	Options					
Close Open Add Workbook Workbook	Delete Recald bk Workbook Estimat		ort PlansXpress Drawing	A Z Sort Workbooks	Find Get Mater Quote	ials	
	· ·	ec C	hart	Reports	Address	Profit	Inflation
My Jobs \ Job Summar	У			Linke	l he		
Workbook Name	Remarks .	Total Cost	Comments	. Spec?		Last opened	
Brick and Block Cavity Wall Extension Slab Apex Valley Roof Window Typical Panel Doors Suspended Floor Bi-fold Patio Doors Aluminium Structural Opening Shallow Access Manhole Drainage Plant Drain Runs Subcontract Quotations Bathroom and Cloaks *		£ 6,868.29 £ 733.38 £ 4,291.52 £ 1,314.60 £ 433.98 £ 3,037.05 £ 486.11 £ 242.20 £ 1,54.60 £ 2,800.00 £ 4,95.9		Yes Yes Yes Yes Yes Yes Yes	Completed Completed Completed Completed Completed Completed Completed	10/12/2015 11:21 10/12/2015 11:41 11/12/2015 09:53 11/12/2015 10:46 11/12/2015 10:21 11/12/2015 10:21 11/12/2015 16:15 11/12/2015 15:25 11/12/2015 15:25 11/12/2015 13:48 11/12/2015 11:42	
No of Items 13	Sub Total (ex VAT & Profit)	£ 20,781.31					

Chart

[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**.

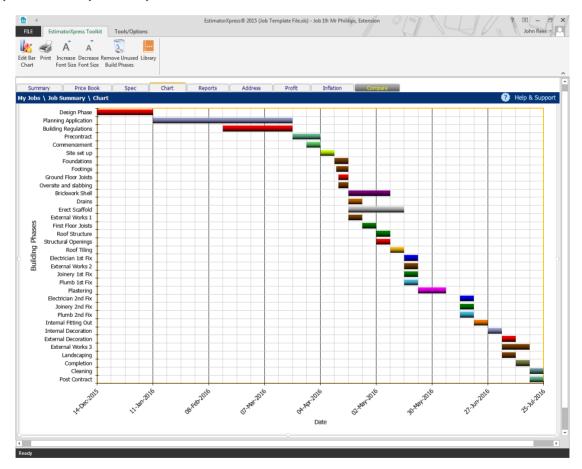


TIP: For more information about creating and modifying Bar Charts press Help or press your F1 Key on your keyboard.



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).

Job Start Date		
Monday Dec 14 2015		💠 Add Bars
Build Phase		🛞 Zoom
Start:	Duration: Week Day	Y Filter Bars
Week Day Build Phase: 0 ÷ 0 ÷ Design Phase	Week Day ▼ 4 ÷ 0 ÷	🔄 Refresh
Cascade: Start Date: Monday Dec 14 2015	Cascade	Close

[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.



Increase Decrease Font Size Font Size 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.

Chart

(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.

Edit Bar Chart	(2)
Edit Bar Chart Job Start Date Monday Dec 14 2015 Build Phase Start: Week 0 + Cascade: Start Date: Monday Ground Floor Joists Oversite and slabbir Brickwork Shell	Day
Drains Erect Scaffold External Works 1	

	Edit Bar Chart	(2)
To move this phase to week 2, for example, click on the Down Arrow of the Start Week in the dialog box.	Job Start Date Monday Dec 14 2015 Build Phase Start: Week Day Build Phase: Week Day Build Phase: Week Day Build Phase: Cascade: - 15 weeks, 0 days Start Date: Monday Dec 28 2015 End Date: Monday Jan 4 2016 Add Bars Q Zoom Filter Bars Cascade Close Close	

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

```
Cascade
```

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

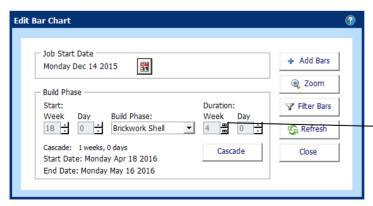
You will see that all the Build Phases following Foundations have been brought forward by the same number of weeks.

[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.

[3] To move this phase to week 2, for

- [7] Scroll down until you find Brickwork Shell.
- [8] Select Brickwork Shell using the mouse.

dit Bar Chart				3
Job Start Date Monday Dec 14 201 Build Phase Start: Week Day 2 1 0 1 Cascade: - 15 weeks, Start Date: Monday End Date: Monday	Build Phase: Foundations	Duration: Week Day 1 1 0 1 Cascade	 Add Bars Zoom Filter Bars Refresh Close 	
	Erect Scaffold External Works 1			



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.

114 Tutorial Bar Chart Planner

Cascade	[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.
	he Build Phases after Brickwork shell are moved back one week. Check the values of each nfirm that you are happy with the result.
😘 Refresh	[11] When you have finished modifying the chart, click the Refresh button to ensure all phases of your chart are on screen.
Close	[12] When finished click the Close button on dialog box.
Print	[13] To print the chart, click the Print button on the top toolbar.
Summary	[14] To exit the Job Bar Chart screen to return to the Job Summary, click on the Summary tab.

lf yo	u 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.	Close
2.	You are transferred to the My Jobs . Close this screen also using the Close button.	Close
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

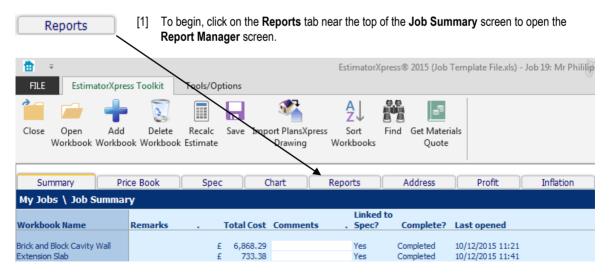
You are now going to look at producing **Reports** with the **EstimatorXpress® Report Manager** to help with the costing, quoting, planning and management of your **Job**.

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:

lf you	u wish to start this tutorial having closed EstimatorXpress®:	
1.	Press the My Estimates button at the top of the Main Menu screen.	My Estimates
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.	Open Estimate

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.



			EstimatorX
FILE EstimatorXpress Toolki	t Tools/Options		
		A7 Eud	
	w w		
	ner Invoices Stage		CIA Accounts
Report Report Reset Report Quote	s • Payments	 Wizard Zeros 	 Export
Summary Price Book	Spec	Chart	Reports
My Jobs \ Job Summary \ Re	porte		
My Jobs (Job Summary (Re	ports		
Report Name	Remarks		
Report Name	Kellidrks	•	
Sales Price Cash Flow			
Cost Cash Flow	- Marine 1997		
Profit By Workbook	M		
Sales Price By Workbook	M		
Cost By Workbook	1 i i i i i i i i i i i i i i i i i i i		
Profit By Plant Type	1 Martin 1 M		
Sales Price By Plant Type	1 😂		
Cost By Plant Type	222222222222222222222222222222222222222		
Profit By Subcontract Type			
Sales Price By Subcontract Type			
Cost By Subcontract Type			
Profit By Material Type			
Sales Price By Material Type			
Cost By Material Type			
Profit By Trade			
Sales Price By Trade			
Cost By Trade			
Profit By Type			
Sales Price By Type	- <u> </u>		
Cost By Type	- <u>-</u>		
Profit By Build Phase	1 Mar 1 Anna 1		
Sales Price By Build Phase	1 i i i i i i i i i i i i i i i i i i i		
Cost By Build Phase			
Labour Hours By Trade			
Resource By Workbook Including Profit			
Sales Price Including Profit			
Painting Costs	1		
Plastering Costs	1		
Plumbers Costs Roof Tiler Costs			
Groundworkers Costs			
Bricklayers Costs Joinery Costs			
Plasterers Costs			
Costs Including Vat Net Costs by Workbook	1		
Cost Summary Report	ā		
Costs	5		
Inflated Costs	1		
Costs by Resource			
Costs by Resource Cash Flow			
Inflated Cash Flow			
Profit Forecast	1		
Adjusted Profit Forecast			

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.

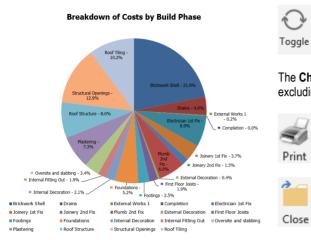
If you are using EstimatorXpress® Total Toolkit you will also have access to the Accounts Export function and the Variations function which allows you to view, amend and resave previously printed Customer Quotes. To open and make changes to previous Quotes, use the Previous Quotes button.



[2] Select the Chart Report called **Cost by Build Phase** and click **Open Report** button.

Report

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**.

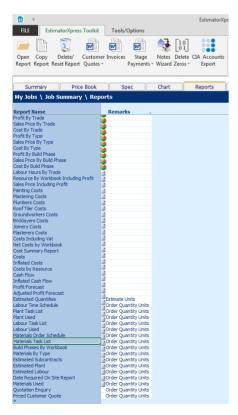


[3] To see this information in monetary terms, click the **Toggle** button on the toolbar.

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	~ PL		Purchase Units 🔄	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13-Apr-0	9	08-Jun-09	Cavity Closer 100mm x 3m	£	30.00		2.00	0.20		£60.00	£6.00	£66.00
			Insulation Block Standard 440 x 215 x 100mm	£	12.00		43.08	4.31		£516.96		£568.66
20-Apr-0	9	01-Jun-09	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80)	£	80.00		2.16	0.22		£172.80	£17.28	£190.08
22-Apr-0			Flooring Grade Polystyrene Insulation Sheet 2400 x 1200 x 100mm	£			2.60	0.26		£103.82	£10.38	£114.20
27-Apr-0	9	08-Jun-09	Cavity Tray Gable Abutment	£	7.50		0.00	0.00	0.00	£0.00	£0.00	£0.00
			Not required	£		Unit	6.00	0.00		£0.00	£0.00	£0.00
			Plastic to Clay Pipe Adapter 110mm	£	15.00		0.00	0.00		£0.00	£0.00	£0.00
			Prestressed Concrete Lintel 65 x 100 x 1050mm	£	6.80		2.00	0.20		£13.60	£1.36	£14.96
			To be defined	£		Unit	0.00	0.00		£0.00	£0.00	£0.00
			Universal M/H Access Chamber Raising Piece 150mm	£			2.00	0.20		£52.00	£5.20	£57.20
			Universal M/H Polymer Cover & Frame 345x345mm	£	62.00		1.00	0.10		£62.00	£6.20	£68.20
11-May-0	9		Brickwork Tie DD 140 Type 4 225mm	£	0.20		141.39	14.14		£28.28	£2.83	£31.11
			Round Wire Nails Bright 100mm x 25kg	£	38.00		0.13	0.01		£4.83	£0.48	£5.32
18-May-0	9		Universal M/H Access Chamber Base Unit 215x100mm	£	62.00		1.00	0.10		£62.00	£6.20	£68.20
		29-Jun-09	Clout Nails Galvanised 65mm x 25kg (slating)	£	54.00		0.00	0.00	0.00	£0.00	£0.00	£0.00
			Half Round Downpipe Saddle Bracket 68mm	£			10.00	0.50		£18.00	£0.90	£18.90
			Natural Slate 400 x 250mm (Each) (Allowance £1.50)	£	1.50		4.00	0.30		£6.00	£0.45	£6.45
			Round Wire Nails Bright 100mm x 25kg	£			0.25	0.02		£9.45	£0.94	£10.39
			RSJ 178 x 102 x 19 kg per m	£	35.00		6.00	0.30		£210.00	£10.50	£220.50
			Sawn Dry Graded Structural Softwood Treated 47.0 x 125mm	£	3.80	MT	19.44	1.46		£73.88	£5.54	£79.43
			Sawn Dry Graded Structural Softwood Treated 47.0 x 150mm	£	3.70		82.25	6.17		£304.32		£327.15
			Sawn Dry Graded Structural Softwood Treated 47.0 x 175mm	£			5.40	0.41		£28.62		£30.77
19-May-0	9		Blue Circle Mastercrete Original Cement 25kg Bag	£	5.30		2.57	0.26		£13.60	£1.36	£14.96
			Building Sand Bulk Bag	£	40.00		0.22	0.02		£8.95	£0.90	£9.85
			Engineering Brick - Class A Blue 65mm	£	0.70		81.00	8.10		£56.70	£5.67	£62.37
			Facing Bricks - Provisional (Allowance £0.40 each)	£	0.40		40.50	4.05		£16.20	£1.62	£17.82
			R'mix Concrete GEN 1, 125mm slump 2-3 m3 (Allowance £85)	£	85.00		0.20	0.02		£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		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 manywher

-
C 11

[9]

Sort by Date

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.



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



Quotes -

 Quote Wizard by Build Phase

 Create a word-processed customer quote.

 From within the Quote Wizard you can ...

 Quote Wizard by Workbook

 Create a word-processed customer quote.

 From within the Quote Wizard you can ...

 Pricture Wizard

 Print screenshots you have taken within the Dims Wizards.

 Open word-processed customer quotes you have previously created.

[1] From the **Reports** tab, click on **Customer Quotes** button and select **Quote Wizard by Build Phase**. The **Quote Wizard** dialog will pop up.

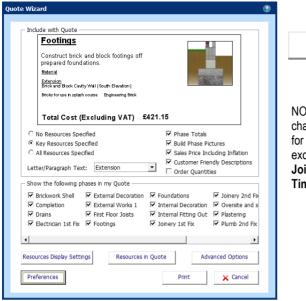
- Quote Wizard Include with Quote Footings Construct brick and block footings off prepared foundations Material Extension Brick and Block Cavity Wall (South Elevation) Bricks for use in splash course Engineering Brick Total Cost (Excluding VAT) £421.15 O No Resources Specified Phase Totals Key Resources Specified Build Phase Pictures C All Resources Specified ☑ Sales Price Including Inflation Customer Friendly Descriptions Letter/Paragraph Text: Extension -Order Quantities More Print 🗙 Cancel
- [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.**

More

We recommend you print your **Quote** with the default settings initially and then experiment with them later.

- Print Click Print to generate your Quote in Microsoft Word. [4] Method of Charging VAT Choose your method of charging VAT on your estimate. O VAT Free [5] • Charge VAT at a set rate over the price including profit 20 % click OK. C Charge VAT at a specified value 🗸 ок X Cancel EstimatorXpress® 2015 se do not use your computer while the Quote Wizard is running 5% EstimatorXpress® 2015 is creating your Customer Quote ready.
 - [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.



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. [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.



- [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 brokendown 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.	Close
2.	You are transferred to the My Jobs. Close this screen also using Close button	Close
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)

Сору

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 m². (£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® was installed.

lcon

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.

Туре

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 \pounds 2.00, then the usage factor would be 0.25. Thus Cost for bedding the coping is \pounds 8.00 * 0.25 = \pounds 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 m², 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 dependent 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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