EstimatorXpress®
Plumbing & Heating Trade Edition
Tutorial

EstimatorXpress® Plumbing & Heating Trade Edition 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 renovation job consisting of installing a new heating system and installing a new bathroom. This will normally take you approximately 1½ 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 19 to start the Tutorial. Once you have familiarised yourself with **EstimatorXpress®** your estimating will speed up dramatically so that a typical job of this size will take just a few minutes.

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 23)
[2] Speak to your local builders merchant to agree terms on materials and enter them into the **Price Book** or subscribe to one of our merchant partners to have this step done automatically!
[3] Check that the labour, plant and subcontract rates accord with your own business and if not, modify them to suit

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 **Help Team** on **0845 1234 085** provided that you hold a valid **HBXL Support & Updates** subscription for **EstimatorXpress®.** For more information, please contact HBXL on **0845 1234 065.**

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 Auto-run.
2. If Auto-run 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® 2000/ XP/ Vista*/7*
- Ensure you are running Microsoft® Word and Excel 2000 SR1/ XP/ 2003/ 2007/2010
- Ensure your Microsoft® Excel Macro settings are set to medium (for instructions on how to check this please see page 8)

* Windows® Vista and 7 only support Microsoft® Word and Excel 2003, 2007 and 2010. Running earlier versions of Word and Excel with Windows® Vista or 7 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.

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

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

3. DOWNLOADING LATEST MATERIAL PRICES

You must have a valid **HBXL 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 around 1500 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.

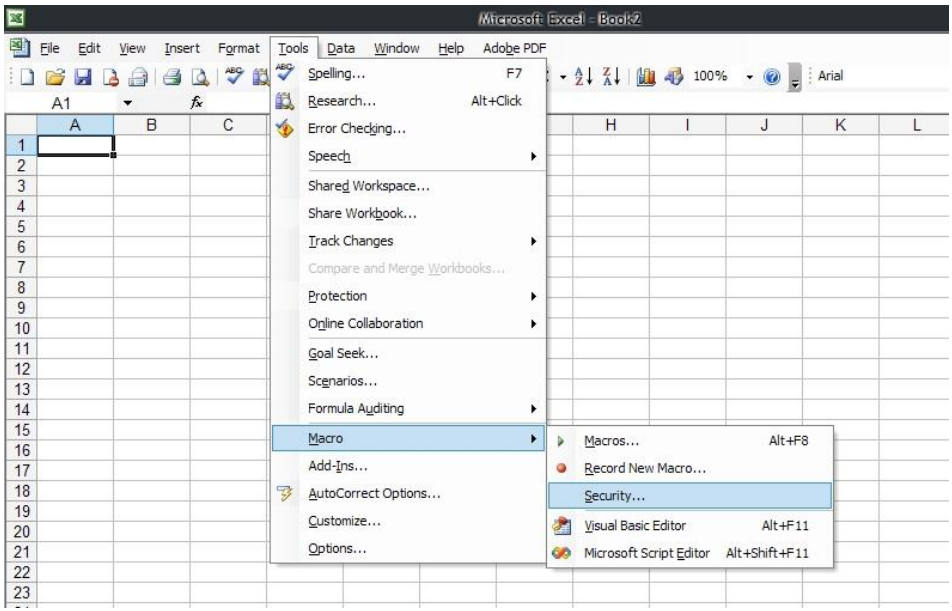
4. OPENING ACCOUNTS WITH ESTIMATORXPRESS® MERCHANT PARTNERS

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 **HBXL Support & Updates** subscription to obtain this service.

To find out more about opening **Trade Accounts** with our Merchant Partners, please contact HBXL on 0845 1234 085.

Important Notes about Excel Macros

When using Excel 2000 SR-1, Excel XP or Excel 2003 if a box doesn't pop up asking if you want to Enable Macros upon opening **EstimatorXpress®**, your macro security settings are set too high and your **EstimatorXpress®** software WILL NOT RUN. To remedy this open up Microsoft® Excel in the normal way and click Tools > Macro > Security.



On the dialog box that pops up click the Medium option then click OK. Close down Excel.

The next time that you start up your **EstimatorXpress®** software, you should be presented with a dialog box asking if you want to Enable or disable the macros, click Enable.

WHAT CAN ESTIMATORXPRESS® DO?

Welcome to EstimatorXpress®

Market leading **EstimatorXpress® Plumbing & Heating Trade edition** is loaded with tools to help you quickly and accurately budget and plan your plumbing and heating 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!

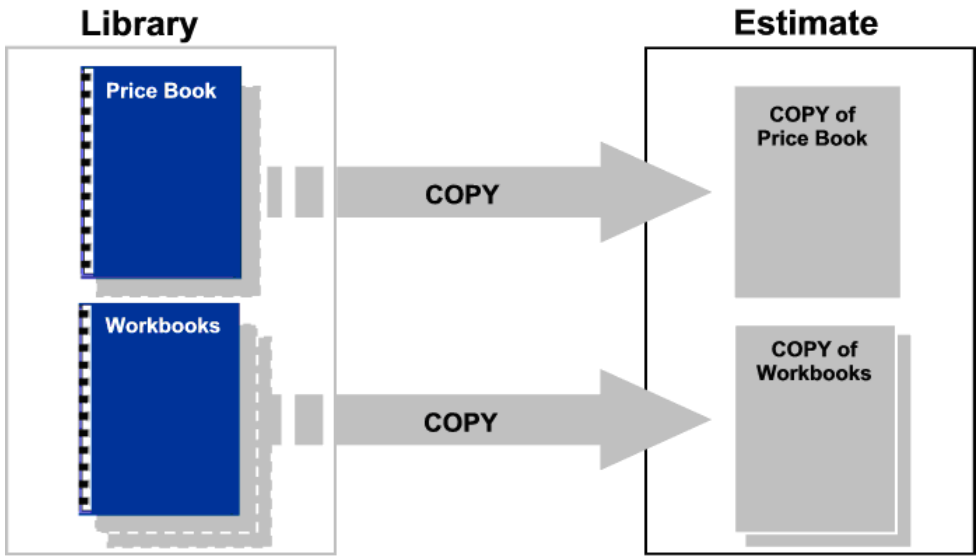
EstimatorXpress® Plumbing & Heating Trade edition is suitable for installers who wish to quickly and easily price up plumbing & heating work. And with a selection of ready prepared 'estimating calculators' including heating systems, kitchens, bathrooms, waste connections, gas and water pipes, you will find it so easy to use you'll wonder how you managed without it. (If you are a small building business and property developer, why not consider **EstimatorXpress® Total Toolkit edition** which can handle extensions, new builds, renovations and conversions.)

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)
- **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** and **Workbooks**) and places the **COPY** in the estimate to create a **Job Price Book** and **Job Workbooks.** Once you have created your estimate, any changes that you make in the **Job Price Book** or **Workbooks** will NOT affect or damage the Library items.



The Master Price Book

EstimatorXpress® Plumbing & Heating Trade edition is provided 'out of the box' with a comprehensive **Master Price Book** of 1000+ resources. The **Price Book** is the heart of **EstimatorXpress®** where all the resource rates are contained. The **Price Book** is split into 5 sections:

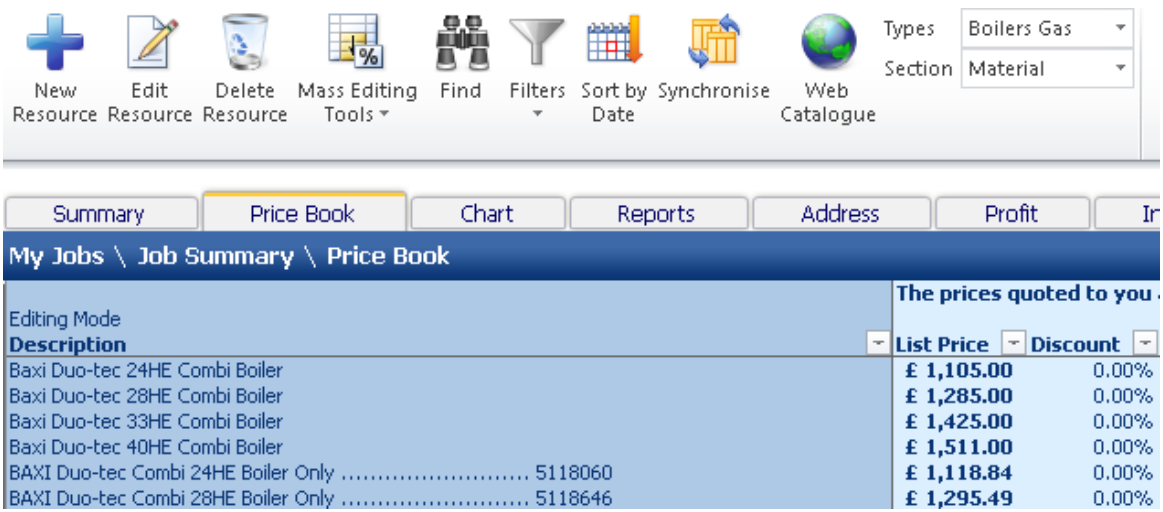
- Materials
- Labour
- Plant
- Subcontract
- Sundry

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 1000+ 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 is in bold type within the **Price Book**. In order to access the online **Price Tracker™** service, you must have a valid subscription to **HBXL Support & Updates**. [To download latest prices into your **Price Book** see page 23.]

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 **HBXL** website and therefore their prices must be checked and maintained manually.

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

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



The Workbooks

EstimatorXpress® carries out the estimating in templates or '**Workbooks**' as we call them. **Workbooks** are used to cost the different elements of the plumbing & heating installation process, i.e. Boilers, Pipe work, Radiator installation, Underfloor Heating, Waste connections and so on. An estimate will therefore normally be made up of multiple **Workbooks** unless you specialise in certain areas of construction.

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

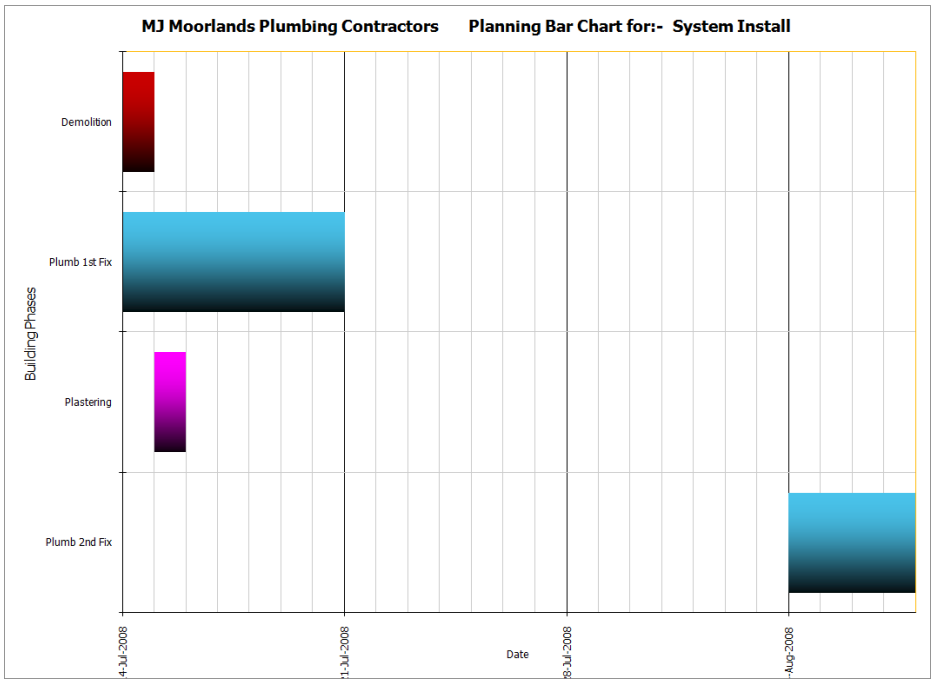
EstimatorXpress® Plumbing & Heating Trade edition comes with over 100 standard **Workbooks.** These **Workbooks** are stored in the **Library of Workbooks**.

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** or 2) By creating a completely new **Workbook** by using a composite, area, volume or perimeter or 3) by using the **EstimatorXpress® PowerPack***.

* **EstimatorXpress® PowerPack** is an optional extra software module for experienced **EstimatorXpress®** users available for purchase from HBXL. Please call 0845 1234 065 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 Plumb 1st Fix bar on the chart is linked to all the **Materials**, **Labour**, **Plant**, **Subcontract** and **Sundry** involved with the construction of the plumbing 1st fix.

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 with delivery. 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® Plumbing & Heating Trade edition** 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.

Order By	Date required	Description	Purch Cost (£)	Purchase Units	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
19/05/2008	14/07/2008	Plastic Pipe Conduit 15mm x 25M	21	EA	1.40	0.11	1.51	£29.40	£2.21	£31.61
		Plastic Pipe Conduit 22mm x 25M	26	EA	0.30	0.02	0.32	£7.80	£0.59	£8.39
02/06/2008	14/07/2008	Glow-Worm Flexicom 30cx Combi Boiler	1044	EA	1.00	0.08	1.08	£1,044.00	£78.30	£1,122.30
		Silicone Lubricant 125gm	13	EA	1.00	0.08	1.08	£13.00	£0.98	£13.98
09/06/2008	04/08/2008	Plastic Radiator Draincock 15mm	5.4	EA	1.00	0.08	1.08	£5.40	£0.41	£5.81
16/06/2008	14/07/2008	Plastic Straight Connector 15mm	1.4	EA	1.52	0.11	1.63	£2.13	£0.16	£2.29
23/06/2008	04/08/2008	Basin Taps Pair (Allowance £12)	12	PR	1.00	0.08	1.08	£12.00	£0.90	£12.90
		Bath Taps Pair (Allowance £14)	14	EA	1.00	0.08	1.08	£14.00	£1.05	£15.05
		Brass Basin Waste with Plug and Chain	5	EA	1.00	0.08	1.08	£5.00	£0.38	£5.38
		Brass Bath Waste with Plug and Chain	12	EA	1.00	0.08	1.08	£12.00	£0.90	£12.90
		Chrome isolating Ball Valve Copper x Copper 22mm	3.9	EA	2.00	0.15	2.15	£7.80	£0.59	£8.39
		Chrome Shower Mixer	120	Each	1.00	0.08	1.08	£120.00	£9.00	£129.00
		Close Coupled Pan and Cistern (Allowance £100)	100	PR	1.00	0.08	1.08	£100.00	£7.50	£107.50
		Hand Basin including Pedestal (Allowance £40)	40	PR	1.00	0.08	1.08	£40.00	£3.00	£43.00
30/06/2008	14/07/2008	Air Admittance Valve 110mm	81	EA	1.00	0.08	1.08	£81.00	£6.08	£87.08
		Chrome Isolating Ball Valve Copper x Copper 15mm	1.2	EA	1.00	0.08	1.08	£1.20	£0.09	£1.29
		Clip Over Pipe Clip 15mm	0.2	EA	10.50	0.79	11.29	£2.10	£0.16	£2.26
		Clip Over Pipe Clip 22mm	0.3	EA	6.00	0.45	6.45	£1.80	£0.14	£1.94
		Copper End Feed Elbow 15mm	0.3	EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Equal Tee 15mm	0.4	EA	1.00	0.08	1.08	£0.40	£0.03	£0.43
		Copper End Feed Stop End 15mm	1.1	EA	1.00	0.08	1.08	£1.10	£0.08	£1.18
		Copper End Feed Straight Coupler 15mm	0.2	EA	3.50	0.26	3.76	£0.70	£0.05	£0.75
		Copper End Feed Straight Coupler 22mm	0.4	EA	2.00	0.15	2.15	£0.80	£0.06	£0.86
		Copper Pipe Clip 28mm	26	HD	0.04	0.00	0.04	£1.04	£0.08	£1.12
		Copper Tube EN1057 15mm x 3M	564	HM	0.11	0.01	0.11	£59.22	£4.44	£63.66
		Copper Tube EN1057 22mm x 3M	1128	HM	0.06	0.00	0.06	£67.68	£5.08	£72.76
		Glow-Worm Standard Flue Kit	89	EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Plastic Barrier Pipe Conduit 28mm x 25M	158	EA	0.16	0.01	0.17	£25.28	£1.90	£27.18
		Plastic Bend 135deg 15mm	1.8	EA	4.00	0.30	4.30	£7.20	£0.54	£7.74
		Plastic Double Check Valve 15mm x 15mm	10	EA	2.00	0.15	2.15	£20.00	£1.50	£21.50
		Plastic Elbow 15mm	1.7	EA	40.00	3.00	43.00	£68.00	£5.10	£73.10
		Plastic Elbow 22mm	2.5	EA	25.00	1.88	26.88	£62.50	£4.69	£67.19
		Plastic Equal Tee 15mm	2.4	EA	8.00	0.60	8.60	£19.20	£1.44	£20.64
		Plastic Equal Tee 22mm	3.1	EA	1.00	0.08	1.08	£3.10	£0.23	£3.33
		Plastic Gate Valve 15mm x 15mm	5.4	EA	2.00	0.15	2.15	£10.80	£0.81	£11.61
		Plastic Pipe 15mm x 25M	28	EA	3.20	0.24	3.44	£89.60	£6.72	£96.32
		Plastic Pipe 22mm x 25M	55	EA	0.72	0.05	0.77	£39.60	£2.97	£42.57
		Plastic Pipe Clip Screw 15mm	9	PK	2.53	0.19	2.72	£22.80	£1.71	£24.51
		Plastic Pipe Clip Screw 22mm	9	PK	0.70	0.05	0.75	£6.30	£0.47	£6.77
		Plastic Straight Connector 22mm	1.9	EA	0.42	0.03	0.45	£0.80	£0.06	£0.86
		Plastic Straight Tap Connector 22mm x 3/4 inch	2.8	EA	2.00	0.15	2.15	£5.60	£0.42	£6.02
		Plastic Wallplate Elbow 22mm x 3/4 inch	5.8	EA	4.00	0.30	4.30	£23.20	£1.74	£24.94
		Plastic Wallplate Elbow 15mm	4.4	EA	4.00	0.30	4.30	£17.60	£1.32	£18.92

WORKBOOKS SUPPLIED WITH ESTIMATORXPRESS® PLUMBING & HEATING TRADE EDITION

Below is a list of the **Workbooks** supplied with **EstimatorXpress® Plumbing & Heating Trade edition**. 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**.

Area
Basic Plaster Patching
Bath Bow Fronted
Bath Corner
Bath Deep Fill
Bath Double Ended
Bath Freestanding
Bath Standard
Bath Virgo Solus
Bath Whirlpool
Bathroom Taps Bologna*
Bathroom Taps Contract*
Bathroom Taps High Spec
Bathroom Taps Lever*
Bathroom Taps Lucca*
Bathroom Taps Non Concussive*
Bathroom Taps Sienna*
Bathroom Taps Standard
Bathroom Taps Verona*
Bathroom Taps X Head*
Boiler Baxi Combi
Boiler Baxi System
Boiler Expansion Tank
Boiler Glow-Worm Combi
Boiler Glow-Worm System
Boiler Ideal Combi
Boiler Ideal System
Boiler Potterton Combi
Boiler Potterton System
Boiler Saunier Combi
Boiler Saunier System
Boiler Vaillant Combi
Boiler Vaillant System
Boiler Vokera Combi
Boiler Vokera System
Boiler Warmflow Combi Oil
Boiler Warmflow System Oil
Boiler Worcester Combi
Boiler Worcester Combi Oil
Boiler Worcester System
Boiler Worcester System Oil
Ceramic Wall Tiling
Chasing Walls
Commissioning Water System
Composite Items
Composite Items 1
Composite Items 2
Composite Items 3
Copper Pipe Compression 10mm Fixings
Copper Pipe Compression 15mm Fixings
Copper Pipe Compression 22mm Fixings
Copper Pipe Compression 28mm Fixings
Copper Pipe Compression 8mm Fixings
Copper Pipe End Feed 15mm Fixings
Copper Pipe End Feed 22mm Fixings
Copper Pipe End Feed 28mm Fixings
Copper Pipe End Feed 8mm and 10mm Fixings
Copper Pipe Manifolds and Micrafolds
Copper Pipe Solder Ring 15mm Fixings
Copper Pipe Solder Ring 22mm Fixings
Copper Pipe Solder Ring 28mm Fixings
Copper Pipe Solder Ring 8mm and 10mm Fixings
Floorboard Lifting for Installations
Gas Connections
Gas Fire
Gas Pipe Install Horizontal Copper End Feed
Gas Pipe Install Horizontal Copper Solder Ring
Gas Pipe Install Vertical Copper End Feed
Gas Pipe Install Vertical Copper Solder Ring
Hacking Plaster from Walls
Heating System Components
Hot Water Cylinder
K1 Single Panel Radiator 300 Deep
K1 Single Panel Radiator 400 Deep
K1 Single Panel Radiator 500 Deep
K1 Single Panel Radiator 600 Deep
K1 Single Panel Radiator 700 Deep
K2 Double Panel Radiator 300 Deep
K2 Double Panel Radiator 400 Deep
K2 Double Panel Radiator 500 Deep
K2 Double Panel Radiator 600 Deep
K2 Double Panel Radiator 700 Deep
Kitchen Taps Contract*
Kitchen Taps Cortona*
Kitchen Taps Genoa*
Kitchen Taps High Spec
Kitchen Taps Lever*
Kitchen Taps Standard
Kitchen Taps Volterra*
Kitchen Taps X Head*
Outside Tap
P+ Double Panel Radiator 400 Deep
P+ Double Panel Radiator 600 Deep
Perimeter
Pipe Install Horizontal Copper End Feed
Pipe Install Horizontal Copper Solder Ring
Condensate Soakaway for Boiler
Pipe Install Horizontal Plastic
Pipe Install Vertical Copper End Feed
Pipe Install Vertical Copper Solder Ring
Pipe Install Vertical Plastic
Plastic Pipe 10mm Fixings
Plastic Pipe 15mm Fixings
Plastic Pipe 22mm Fixings
Plastic Pipe 28mm Fixings
Plumbing Consumables
Radiator Tails 10mm Copper Microbore
Radiator Tails 10mm Plastic Microbore
Radiator Tails 15mm Copper
Radiator Tails 15mm Plastic Microbore
Radiator Tails 8mm Copper Microbore
Sanitaryware Ascot Range*
Sanitaryware Cheltenham Range*
Sanitaryware Chichester Range*
Sanitaryware Cube Range*
Sanitaryware Onyx Range*
Sanitaryware Oxford Range*
Sanitaryware Pricetracker Range
Sanitaryware Pride Range*
Sanitaryware Zone Range*
Shower Electric
Shower Enclosure Curved
Shower Enclosure Rectangular
Shower Enclosure Square
Shower Enclosure WalkIn
Shower Mixer*
Shower Pricetracker Mixer **
Shower Pump
Shower Screen
Showerbath
Soil Pipe
Subcontract Quotations
Towel Rail Curved
Towel Rail Curved With Heater
Towel Rail Straight
Towel Rail Straight With Heater
Towel Rail Traditional
Underfloor Heating in Floating Floor
Underfloor Heating in Joists
Underfloor Heating in Screed
Volume
Waste Kitchen
Waste Pipe Fixings
Waste Pipe Install 32mm
Waste Pipe Install 40mm
Water Tank Loft

* **Workbooks** only available with a Jewson or Grahams Trade Account link

UNDERSTANDING THE DIFFERENT TYPES OF WORKBOOKS

The **Workbooks** supplied as standard with **EstimatorXpress® Plumbing & Heating Trade edition**, can be categorised as one of three 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 how they fit together within the program.

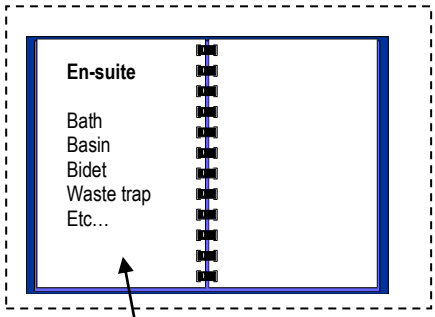
THE COMPOSITE ITEMS WORKBOOKS

Composite Items Workbooks deal with the highly variable elements of a job 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 Boilers, Pipe Installation and Radiators. In general you will use a **Composite Items Workbook** when there is a group of resources that form a collection that you will quantify all together i.e. a Basin will have resources of: Basin, pedestal, basin waste, bottle trap, waste pipe, screws to secure pedestal, silicone sealant & the labour to fit the items. In the main you will pick this group of resources as a whole rather than choosing them individually.

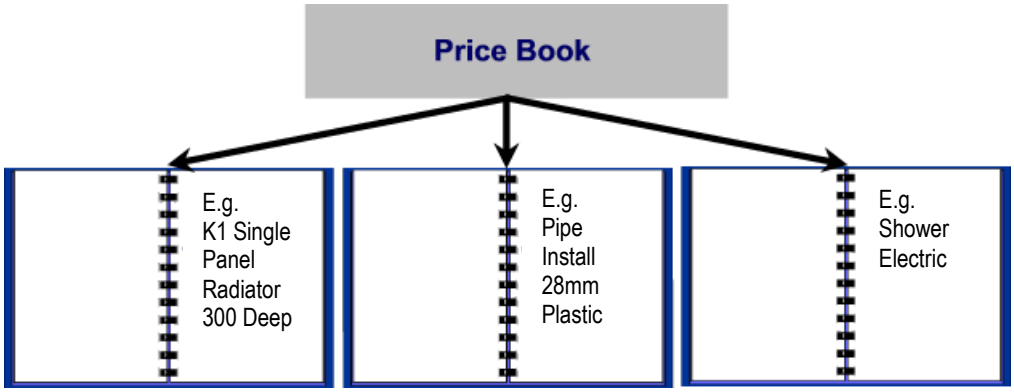
Based on a **Composite Items Workbook** you could create your own **Composite Item Workbook** for the cost of fitting out a luxury en-suite bathroom comprising for example:

- Bath
- Basin
- Bidet
- Waste Connections
- Labour Costs…

NOTE: The **Composite Items Workbook** is not dependent on the inputting of dimensions but entering quantities. **Materials** and other resources contained in a **Composite Items Workbook**, are by their nature completely "free form".



Ensuite Bathroom Worksheet in Luxury Bathroom Workbook



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

WORKBOOKS WITH A DIMENSION/QUANTITY ENTRY SECTION

The **Workbooks with a dimension/quantity entry section** are linked to a range of calculators provided within **EstimatorXpress® Plumbing & Heating Trade edition**, and provide a variety of complex calculations for items such as underfloor heating.

The other **Workbooks** in this category consist of a list of similar items that require quantifying individually i.e. a **Plastic Pipe 22mm Fixings Workbook** has 18 different fixings of that size that you can quantify as required.

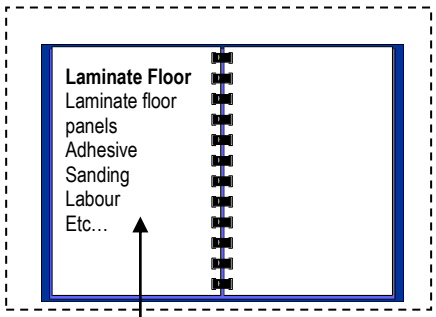
THE AREA, PERIMETER AND VOLUME WORKBOOKS

The template **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 bathroom laminate floor comprising:

- Laminate Floor
- Adhesive
- Sanding
- Labour

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



Laminate Floor Worksheet in Laminate Floor Workbook

PRINCIPLES OF ESTIMATING

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

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

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

Example: Estimating the Cost of Floor Joists

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

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

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

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

Estimate Rate for Joists =£200.00 x 0.01 =£2.00 per metre

The cost of the material =3.6m x £2.00 =£7.20 each

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

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

The **Estimate Rate** for fixing the joists =£12.00 x 0.0833 =£1.00 per metre

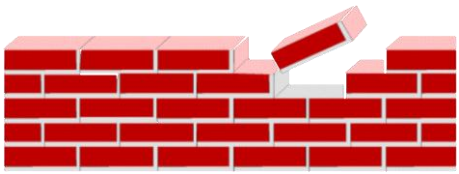
The cost of fixing each joist =3.6m x £1 =£3.60 each

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

£7.20 + £3.60 = £10.80 each.

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

Example: Estimating the Cost of A Brick Wall



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

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

Clearly the area of this wall will be:

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

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

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

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

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

(Again, wastage has been ignored)

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

Production / Usage Factor =60/1000 =0.06

Accordingly the labour cost for the wall would be:

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

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

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

£90 +£108 = £198.00

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

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

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

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

PLUMBING & HEATING TUTORIAL

This chapter is designed as a "hands-on" Tutorial for people with no experience of using **EstimatorXpress®** for Excel 2010. Older versions of office may look slightly different, but the process is largely the same. It assumes you are an absolute beginner, and gives you explanations and step-by-step guides to:

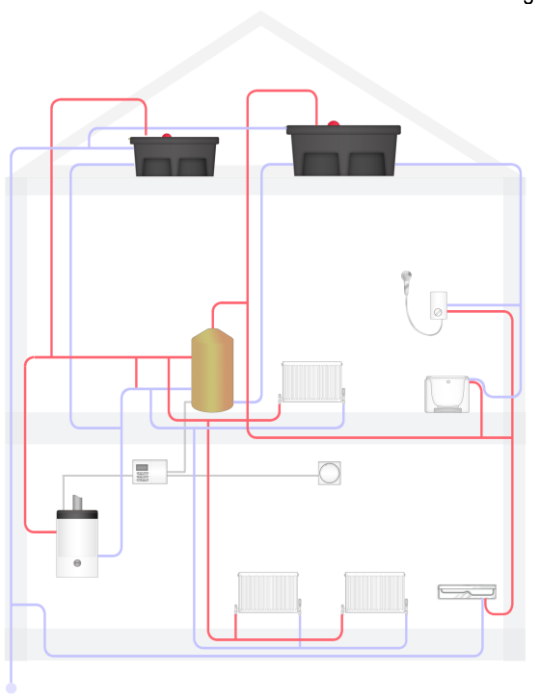
- Downloading the latest Material prices from hbxl.co.uk
- Estimating with **EstimatorXpress®**
- Producing **Bar Charts**
- Producing **Reports**
- Producing **Customer Quotations**

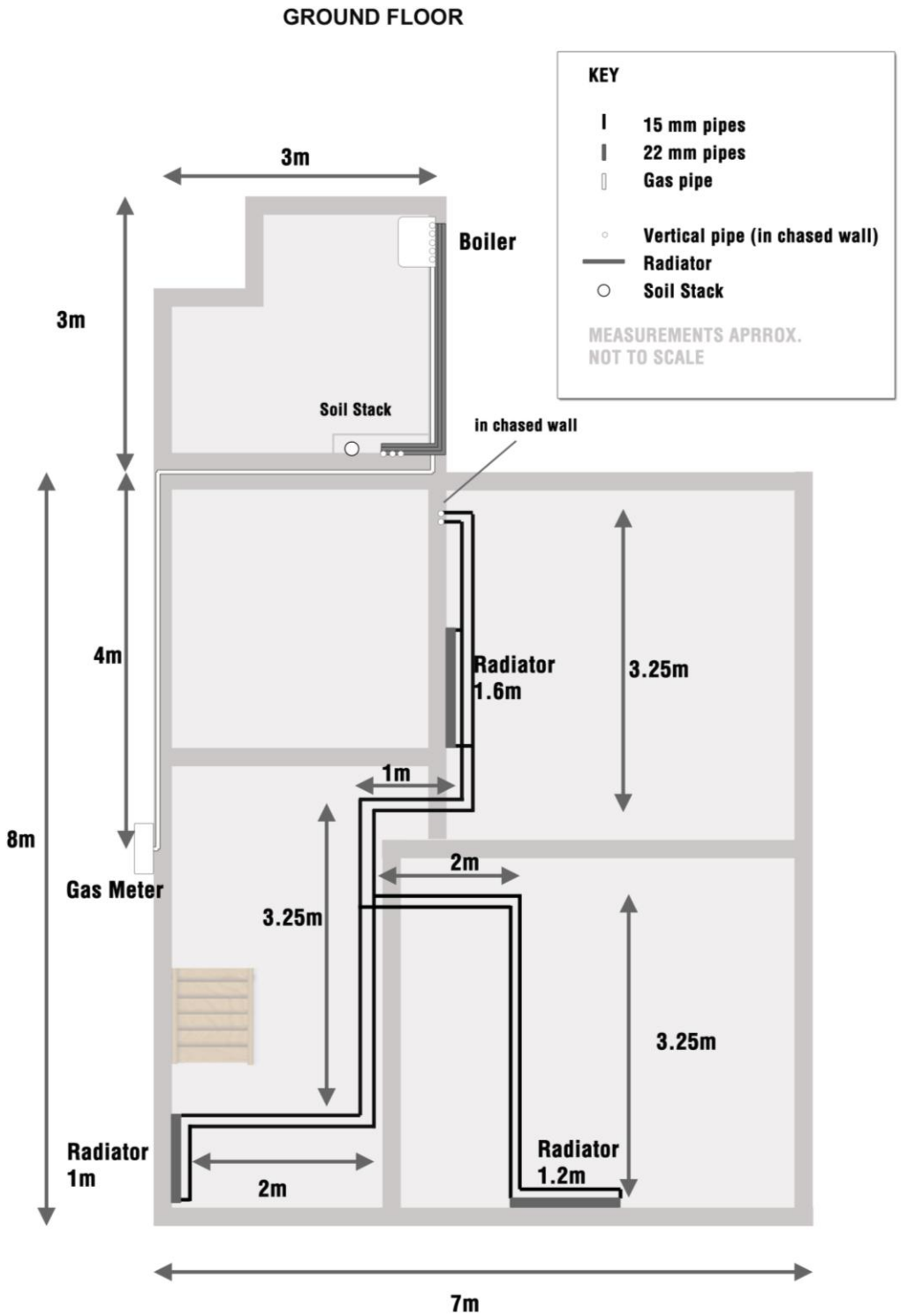
This tutorial takes you through estimating the installation a heating system and a new bathroom to an existing house with an extension being built (see diagrams on page 20) and demonstrates the basic procedures of **EstimatorXpress®**. We will only concern ourselves with the hot water feed from the boiler to the bathroom. Once you have completed the tutorial you will be able to add the cold water feed as an exercise.

The time required to complete each section is indicated in minutes at the introduction. The whole Tutorial should take approximately 1½ hours to complete.

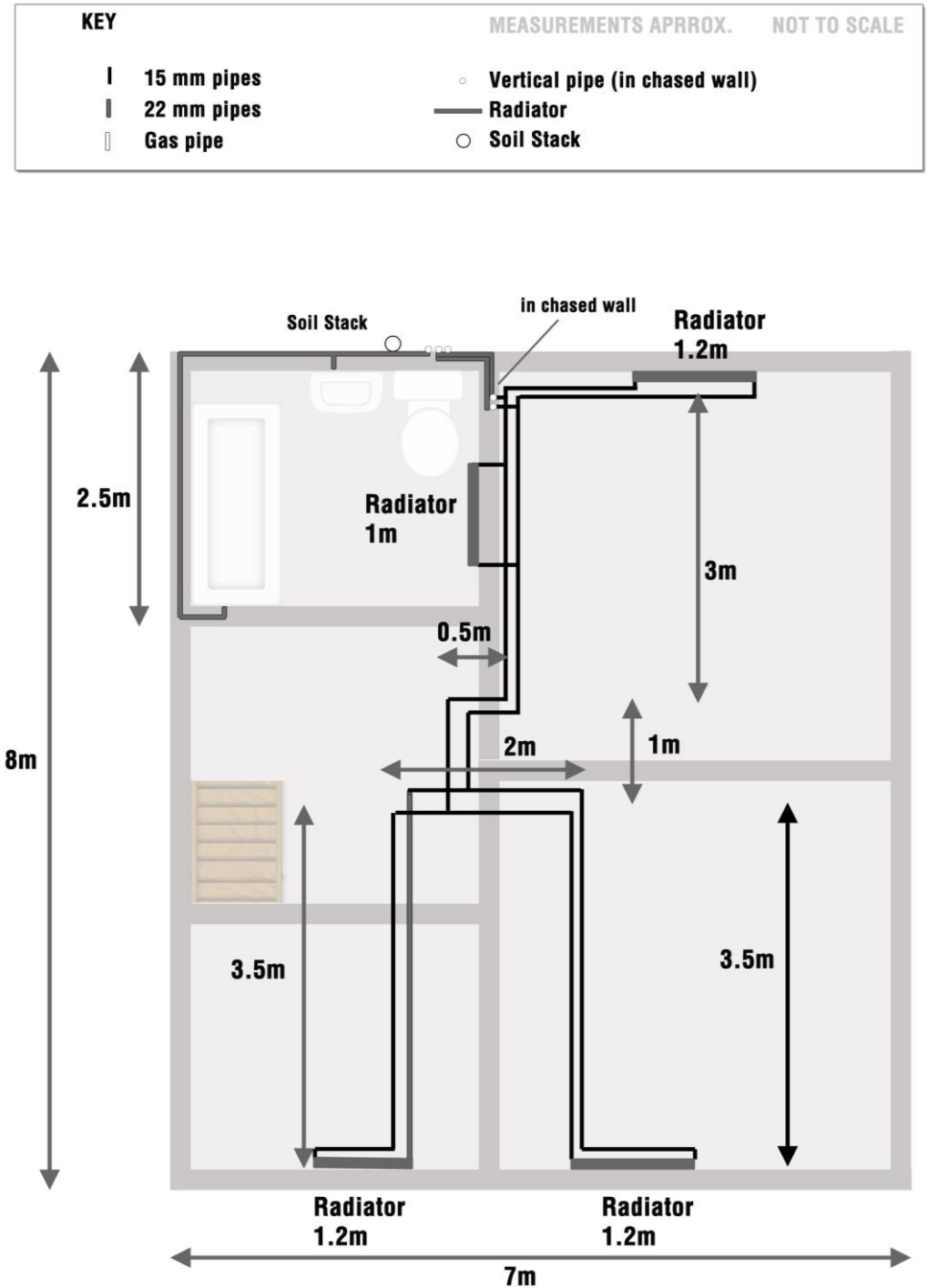
When working through the Tutorial you are strongly advised that once you start a particular section, you continue it until it is complete. At the end of each section, you will be shown how to exit **EstimatorXpress®**, should you wish to.

The following 2 pages have some basic plans with a layout of the house and extension showing the work to be carried out that you will be estimating throughout this Tutorial. You will need to refer back to these drawings. All dimensions on the plan are given in metres where quoted.




GROUND FLOOR
KEY
15 mm pipes
22 mm pipes
Gas pipe
Vertical pipe (in chased wall)
Radiator
Soil Stack
MEASUREMENTS APRROX.
NOT TO SCALE
3m
3m
Boiler
Soil Stack
in chased wall
4m
Radiator
1.6m
3.25m
1m
8m
2m
Gas Meter
3.25m
3.25m
Radiator
1m
2m
Radiator
1.2m
7m

FIRST FLOOR


KEY
MEASUREMENTS APRROX.
NOT TO SCALE
15 mm pipes
22 mm pipes
Gas pipe
Vertical pipe (in chased wall)
Radiator
Soil Stack
Soil Stack
in chased wall
Radiator
1.2m
2.5m
Radiator
1m
3m
0.5m
8m
2m
1m
3.5m
3.5m
Radiator
1.2m
Radiator
1.2m
7m

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, 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 **EstimatorXpress® Total Toolkit** edition.

TIP: If the **Main Menu** does not appear please see page 8 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**.

DOWNLOADING LATEST MATERIAL RATES INTO ESTIMATORXPRESS®

5.00 Minutes

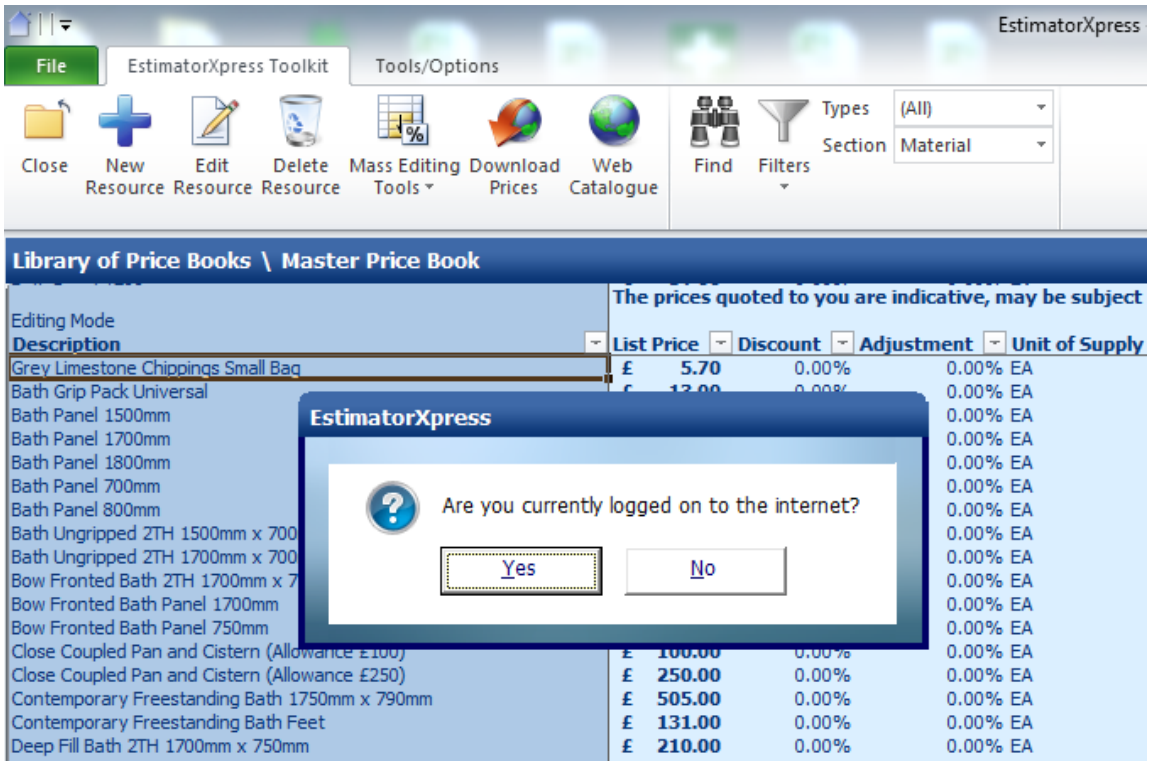
This exercise will lead you through downloading latest prices from our on-line catalogue, which is the key to accurate estimating. These generic prices are kept up to date using HBXL **Price Tracker™** technology.

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

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

Click on **Download Prices** button.

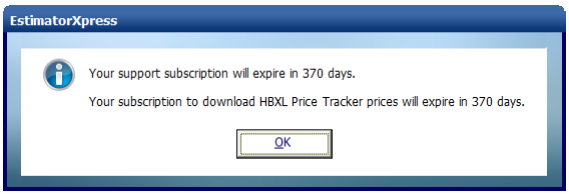
[2] You will now see a list of all of the **Materials** supplied as standard with **EstimatorXpress®.** If you are not logged onto the internet a dialog box automatically pops up asking to notify you that you need to be connected in order to download prices.

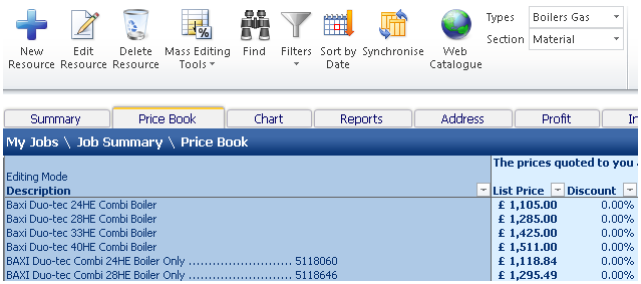


N.B. With some web browsers, you will have to launch your Internet browser (Microsoft® Internet Explorer, Netscape Navigator…) and connect to the Internet manually. We therefore recommend that you do this before you click **Yes**.

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

[3] After a short period, a dialog box will pop up informing you that the download is complete and how much longer your subscription to each merchant's prices has to run.





[4] **EstimatorXpress®** will now process the downloaded latest prices - this may take a minute or two. If you look at the Status Bar at the bottom of the screen, you will be able to see the progress of the **Price Book** update.

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

[5] Your **Price Book** now contains the latest price information and **EstimatorXpress®** will automatically filter your **Price Book** to show any items that have been added or whose prices have changed.

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

SELECTING NEW MATERIALS FROM THE HBXL WEBSITE

5.00 Minutes

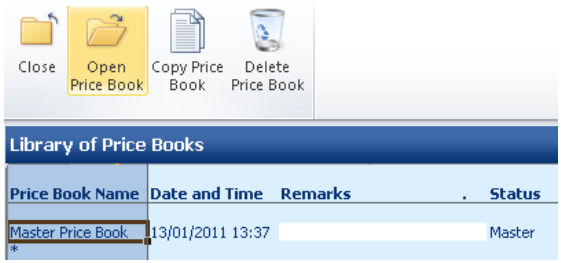
This exercise will lead you through selecting additional products from the Merchant Catalogue(s) on www.hbxl.co.uk to download into your **Master Price Book**. If you do not want to select additional products at this time, go to page 28 to create a new product in your **Price Book**.

NOTE: To select additional materials from www.hbxl.co.uk, you must have a valid subscription to HBXL Support & Updates and a valid subscription to access the prices of one of our Merchant Partners. See page 8 for more information.

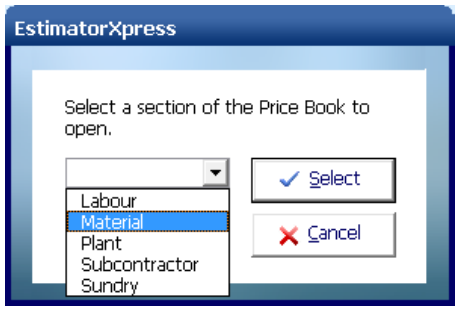
[1] From the **Main Menu,** click on **My Settings.**

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

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

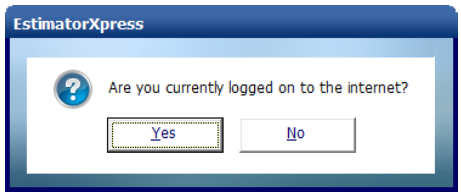


[4] A dialog box will pop up asking you which part of the **Price Book** you wish to open. Select **Materials** and click **Select.**



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

[6] If you are not logged onto the internet a dialog box automatically pops up to notify you that you need to be connected in order to search the web catalogue.



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

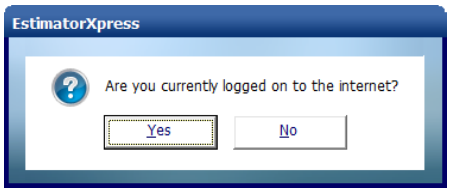
[7] You will now be automatically transferred to www.hbxl.co.uk where you should simply follow the on screen instructions. This involves searching by keyword or navigating through the catalogue by category, then selecting the items from the search results using the product(s) tick-box and confirming your selection at the bottom of the page.

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®**.

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

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

Click **Yes.**



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

[11] Your **Price Book** now contains the item(s) you selected and **EstimatorXpress®** will automatically filter your **Price Book** to show any items that have been added.

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 HBXL 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. 0845 1234 085.

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

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

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

IMPORTANT REMINDER:

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

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

CREATING A NEW PRODUCT IN YOUR PRICE BOOK

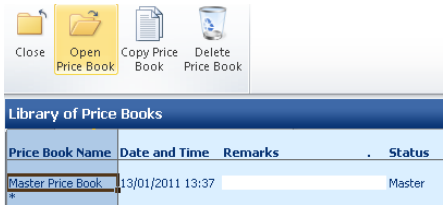
5.00 Minutes

This exercise will lead you through manually creating a new product to add to your **EstimatorXpress® Price Book.**

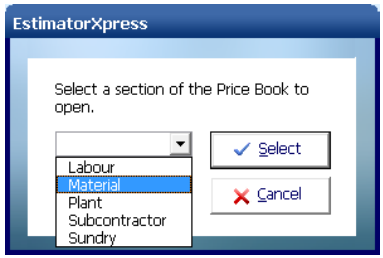
[1] From the **Main Menu,** click on **My Settings.**

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

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

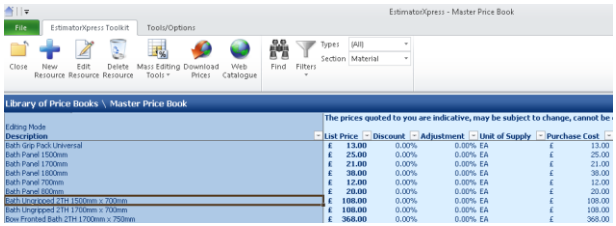


[4] A dialog box will pop up asking you which part of the **Price Book** you wish to open. For this example, select **Materials** and click **Select.**



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

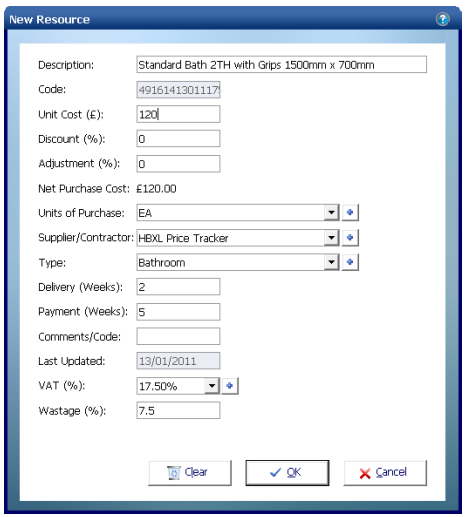
[5] First, select a product similar to the product you wish to create to act as a template for your new product. For example, to add a new bath to your **Price Book**, click on "**Bath Ungripped 2TH 1500mm x 700mm**" with your mouse.



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 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 "**Standard Bath 2TH with Grips 1500mm x 700mm**".

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

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

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

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

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

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

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

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

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

CREATING THE SYSTEM INSTALL & BATHROOM ESTIMATE

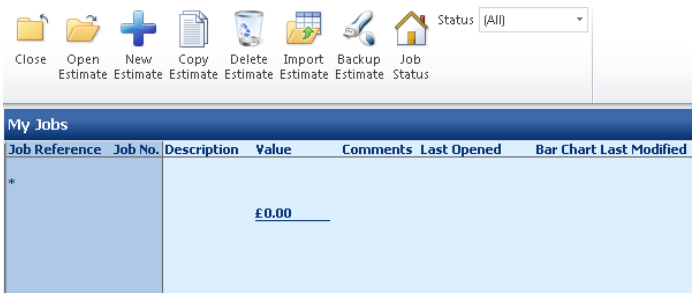
5.00 Minutes

Let's start Estimating!

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

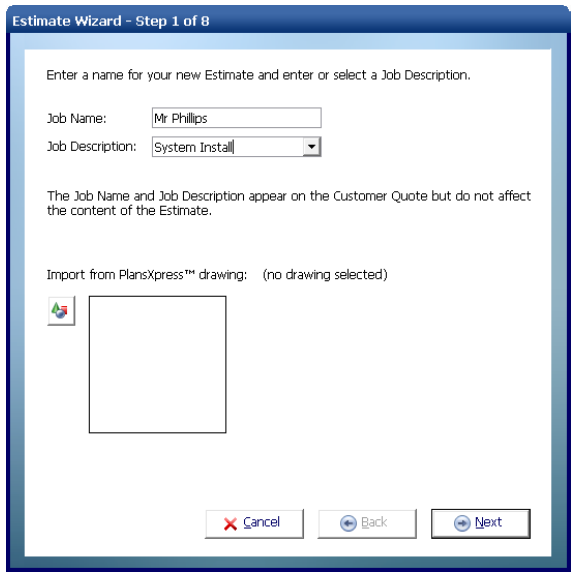
To begin the System Install & Bathroom Demonstration Estimate, press **My Estimates** button.

[2] **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. If this is the first time that you have used the system no **Jobs** will be listed.

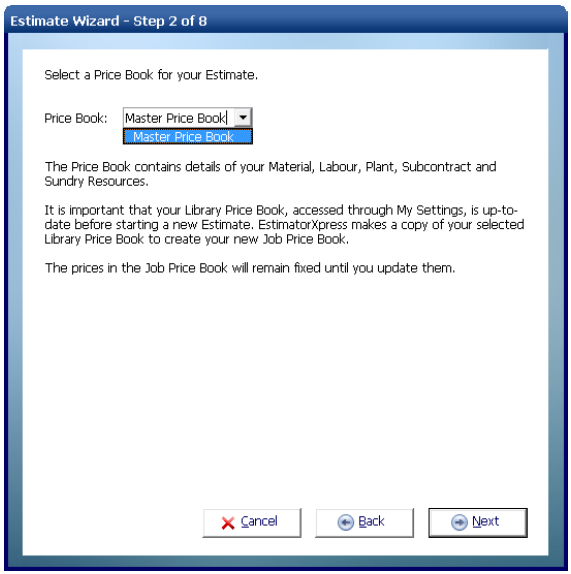


[3] To create a new **Estimate**, press **New Estimate** button.

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

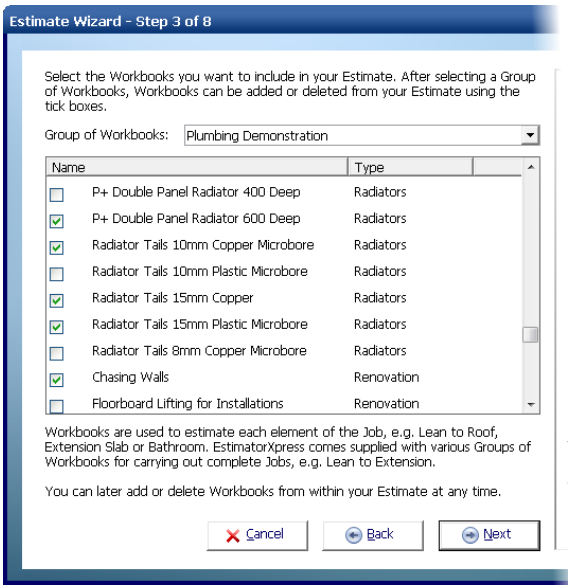


[5] Next give the **Job** a brief description from the drop-down menu. If there is nothing suitable from the menu you can type in your own description. (This description simply helps to describe the **Job** and does not affect the outcome of any calculations.) Click **Next.**



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

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

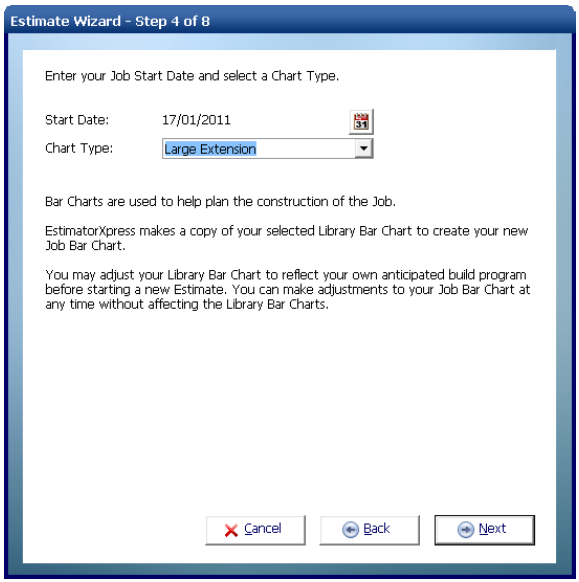


[8] In the next dialog box, you are required to choose a **Group of Workbooks** or a bespoke set of **Workbooks** which most closely matches your **Job**. **Workbooks** are the estimating calculators of the system. In this case, select **Plumbing Demonstration** from the drop-down. Note that you can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

The **Plumbing Demonstration** has been pre-prepared to include the main **Workbooks** you will need to estimate in this tutorial. The **Plumbing Demonstration** includes **Workbooks** to cost boilers, radiators, radiator valves, plastic pipes, plastic pipe fixings, gas pipes, copper pipe fixings, mixer showers, soil pipes, waste pipes, waste pipe fixings, plastic pipes, plastic pipe fixings and chasing walls. When you have selected **Plumbing Demonstration** click the **Next** button.

TIP: **EstimatorXpress®** comes with several **Groups of Workbooks** that include all the **Workbooks** that might need to be considered for estimating typical jobs. You can also create your own **Groups of Workbooks** for the different types of work you carry out by visiting **My Grouped Workbooks** from inside the **My Settings Menu.**

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



[9] 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.

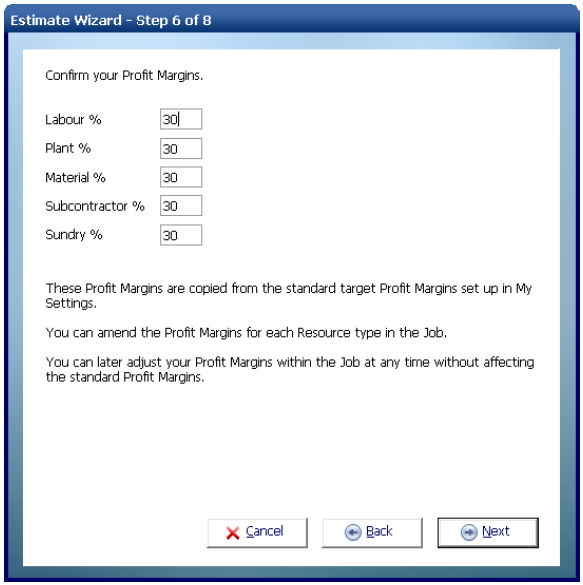
[10] Click **Next**.

[11] Now enter the Customer's **Name** and **Address Details**. These will appear on your printed quotation later should you choose to print one. You can skip this step if you wish by simply clicking **Next.**

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

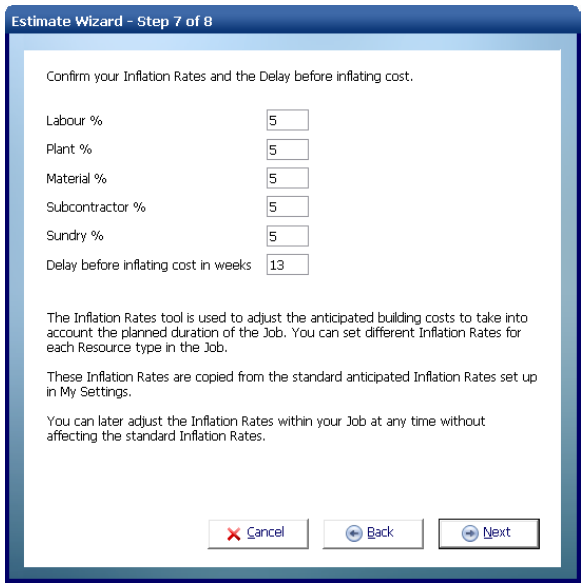
[12] Now confirm your target **Profit Margins** for this **Job**. Click **Next** when you are happy with them.

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

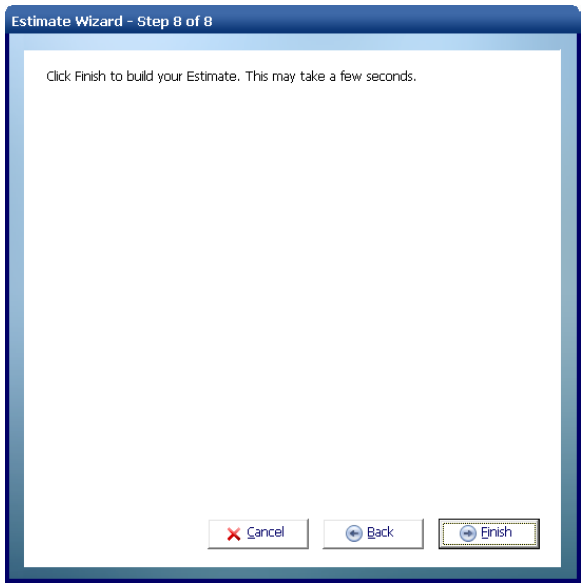


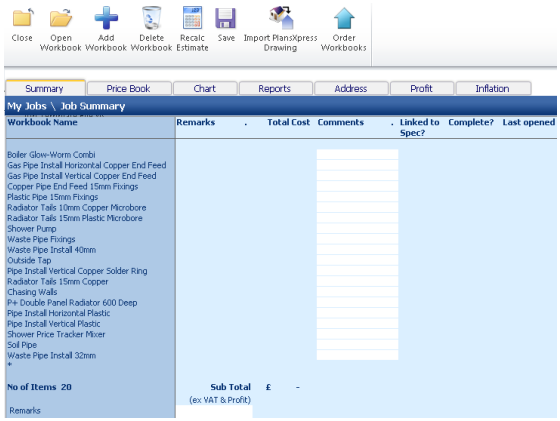
[13] Now confirm any **Inflation Rates** you would like to apply to the **Job** and then click **Next.**

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



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





[15] **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 double clicking on the tabs along the top of the screen, you can also access the **Price Book** which has 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 the F1 Key on your keyboard for further details.

You have now assembled the basic elements for estimating the heating system & new bathroom. You have:

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

You are now ready to start estimating!

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

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

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

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

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

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

ESTIMATING THE SYSTEM INSTALL & BATHROOM

BOILER & GAS CONNECTIONS

15.00 Minutes

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

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

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

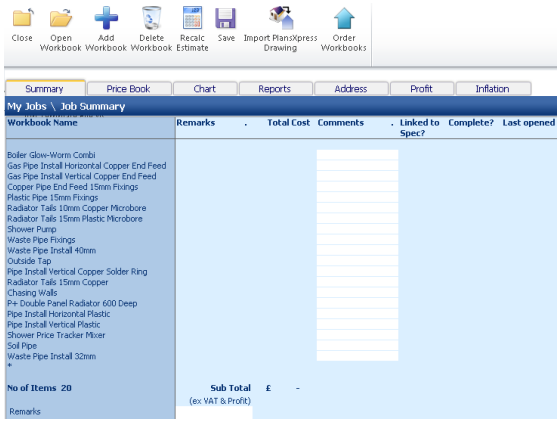
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

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

Now that you have set up the estimate in **EstimatorXpress®**, you can now start actually estimating. This exercise will lead you through the estimating of the **Boiler** together with its associated **Gas Connection** for the new system.

EstimatorXpress® has a number of different **Workbooks** used to estimate for boilers. They are broken down by the fuel type (oil or gas) and then by manufacturer. Once you have decided which boiler you will be using in your estimate you can find the appropriate **Workbook**. In this case we are going to use a **Glow-Worm Flexicom 30CX** which is a gas combi boiler so we will be using the **Workbook** called **Boiler Glow-Worm Combi**.

The **Boiler Glow-Worm Combi Workbook** is an example of a **Composite Workbook** (see page 15 for an explanation of this). It is simply a collection of items of **Labour** and **Material** required to fit the specific boiler required. You should review each item to see if they are required and that the quantities and prices are adequate. Additionally we will move on to estimate for the gas connection to the boiler and later the water connections providing the flow and return to the heating system and to the domestic hot water system.



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

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

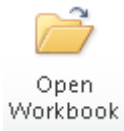
At this stage, no costs are indicated for each **Workbook**, as you have not carried out any estimating for the job.

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

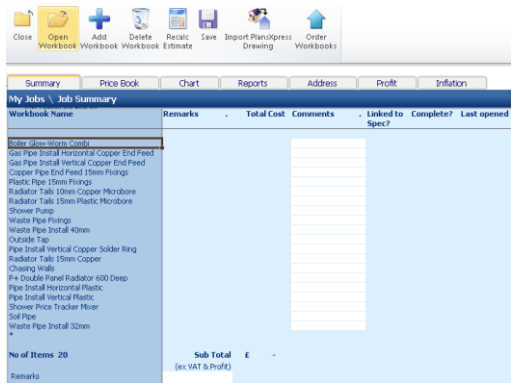
NOTE: If any of the descriptions are not fully visible in any cell or you see ##### anywhere on screen, click the right mouse button, with the mouse over the #####, and select the **Autofit** option from the popup menu. This will automatically fit any text into the cell.

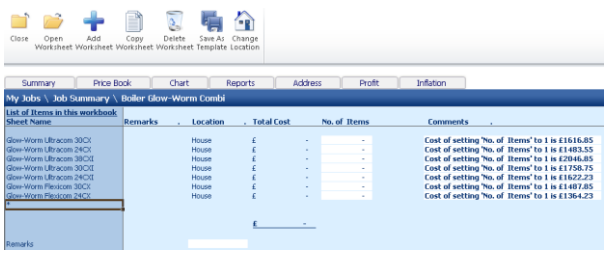
[2] To start estimating, select a **Workbook** from the left-hand side of the screen with the cursor.

Click on **Boiler Glow-Worm Combi**.



Press **Open Workbook** button.



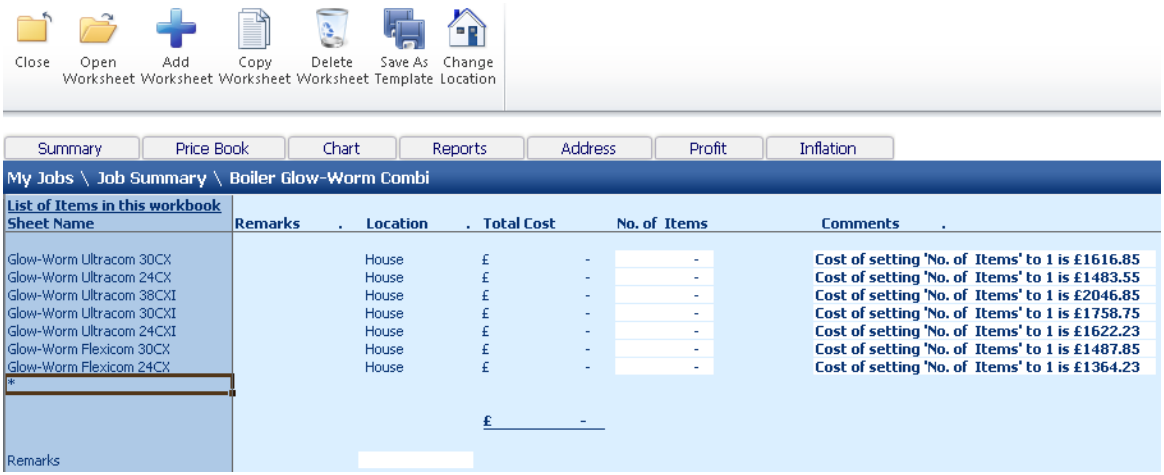


[3] **EstimatorXpress®** transfers you to the **Summary of Boiler Glow-Worm Combi Workbook.**

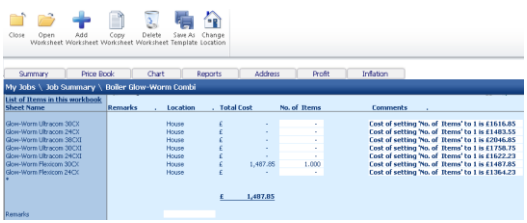
The **Summary of Boiler Glow-Worm Combi Workbook** is used to list different **Worksheets** that are stored within each **Workbook**.

Each **Worksheet** in this **Workbook** can contain a different Boiler.

TIP: If you wanted to add any additional **Worksheets** to the **Boiler Glow-Worm Combi 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. Alternatively you can select a similar boiler and press the **Copy Worksheet** button to use it as a template for your new boiler **Worksheet**.



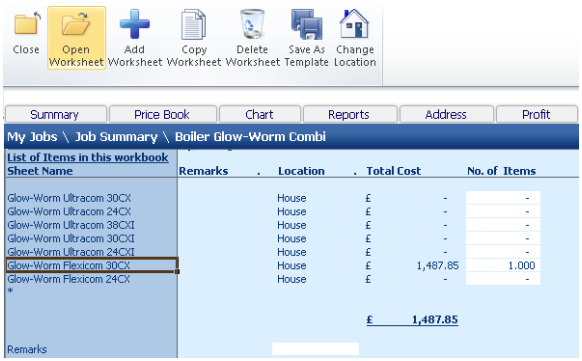
[4] If this is the first time you have opened the **Boiler Glow-Worm Combi Workbook**, you will see a list of different Glow-Worm Gas Combi boilers. The **No. of Items** column will have a **0** quantity next to each boiler and the **Comments** column will display the cost of buying and fitting one of each type of boiler.



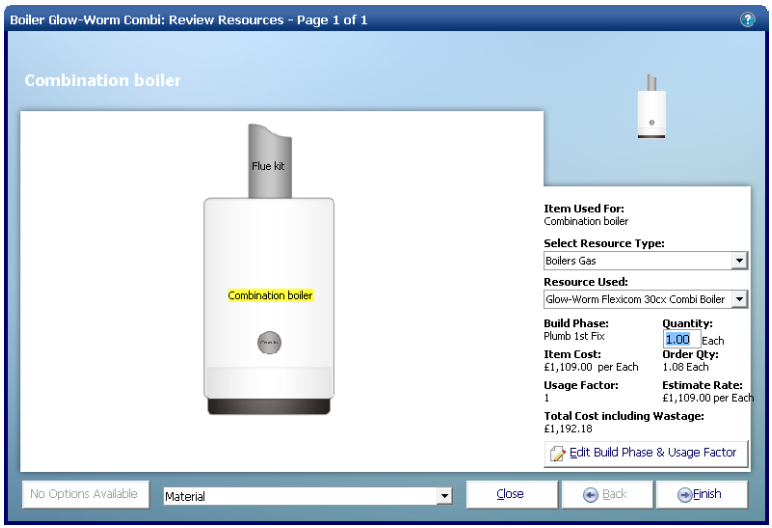
[5] We are going to use the **Glow-Worm Flexicom 30CX** boiler in our system so click in the **No. of Items** column on the row containing the **Glow-Worm Flexicom 30CX** and enter a quantity of 1. You will then see the price of this boiler added to your estimate.

This is all you need to do to estimate for fitting a boiler but we'll now go in to the boiler **Worksheet** to have a look at what's been included.

[6] Open the **Glow-Worm Flexicom 30CX Worksheet** by selecting the **Worksheet** and pressing the **Open Worksheet** button.

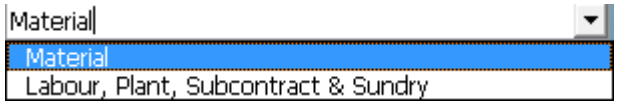


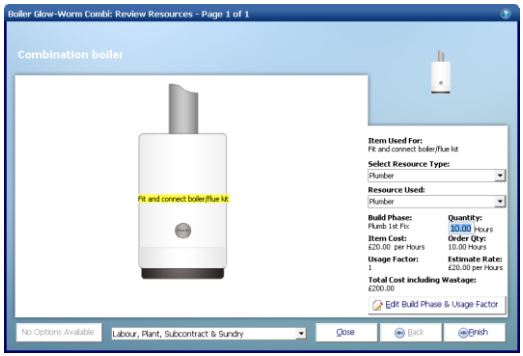
[7] The **Glow-Worm Flexicom 30CX Worksheet** has now been opened and the **Resource Wizard** dialog box has popped up. The **Resources Wizard** allows you to review and change any item of **Material**, **Labour**, **Plant, Subcontract Work** or **Sundry** that is being used inside the **Worksheet**. Click on the **Combination Boiler** label**.** Notice that this item is now highlighted in yellow.



[8] On the right hand side of the dialog you will see that the **Resource Used** i.e. **GLOW-WORM Flexicom 30cx Combi Boiler** and also the **Build Phase, Quantity, Cost, Order Quantity, Usage Factor, Estimate Rate and Total Cost including Wastage** are also displayed here for this product. To change the **Resource Used** you can simply select a different boiler from the **Resource Used** drop-down menu.

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

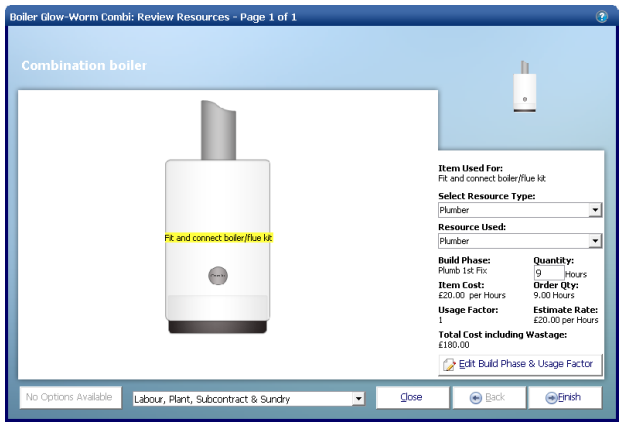




[10] Notice that the drawing now has a label for the **Labour** associated with fitting the boiler**.**

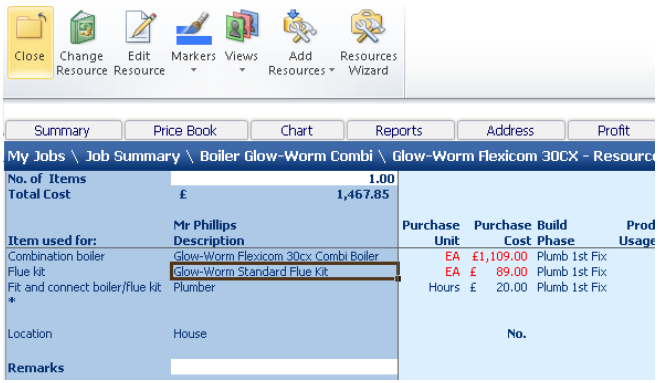
Click on **Fit and connect boiler/flue fit** to review the labour for this item.

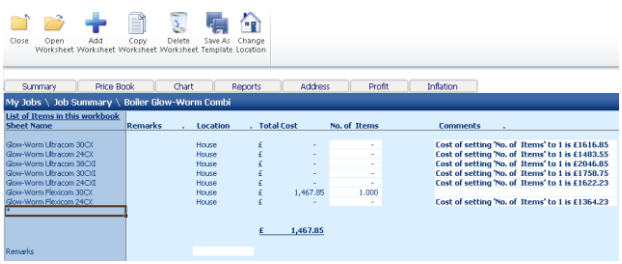
[11] Under **Quantity** on the right hand side you can see that 10 Hours have been allowed to carry out this task. If you only want to allow 9 hours you can delete the 10 and type in 9 instead. You will see the **Total Cost including Wastage** figure will drop to represent the change in rate to **Fit and connect boiler/flue kit**.



[12] Click **Finish** to return to the **Glow-Worm Flexicom 30CX Worksheet**.

[13] Then press the **Close** button to return to **Summary of Boiler Glow-Worm Combi Workbook**.

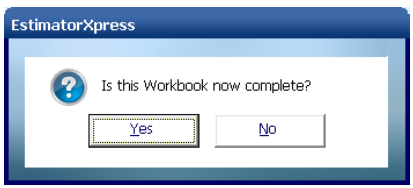




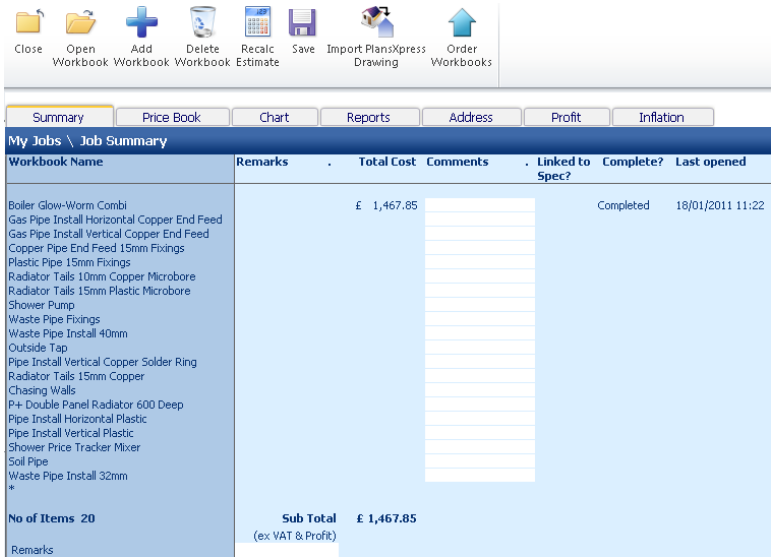
[14] You will now see a final cost for the **Glow-Worm Flexicom 30CX.**

Now, to return back to **Job Summary**, press the **Close** button. This will automatically save your **Boiler Glow-Worm Combi Workbook**.

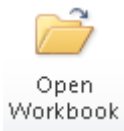
[15] A dialog box pops up asking if this item (Boiler **Workbook**) is now complete. Click **Yes**. *(This marks the* **Boiler Glow-Worm Combi Workbook** *"Complete" in the* ***Job*** *Summary Screen)*



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

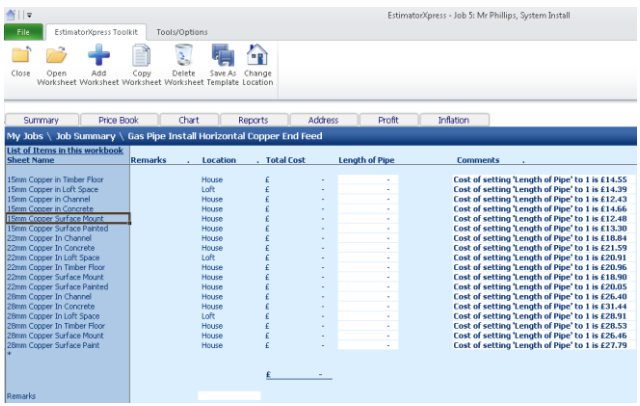


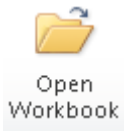
Next we are going to allow for the gas pipes to connect from the meter to our boiler. **EstimatorXpress®** has several **Workbooks** to allow for this. Gas pipes are divided up into different **Workbooks** depending on the connection method (Solder Ring and End Feed) and whether the pipes will be laid horizontally or vertically.



[16] To start estimating your **Gas Pipes** in the **Job Summary** screen, select **Gas Pipe Install Horizontal Copper End Feed** and press the **Open Workbook** button.

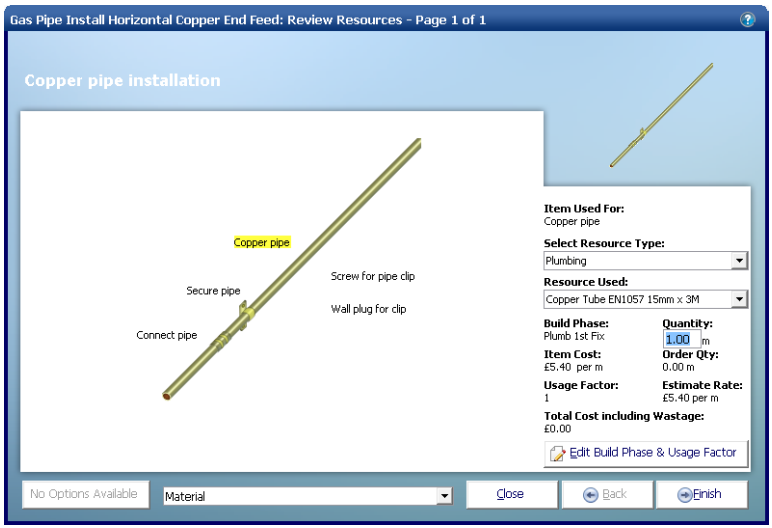
[17] Again you will see that there are different types of Gas Pipes already set up in the **Workbook** that you can price up. In this case we are going to surface mount our 15mm pipes feeding the boiler and will allow for 9 metres.

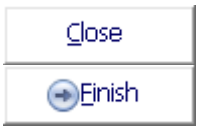




[18] Select the **15mm Copper Surface Mount Worksheet** and click **Open Worksheet.**

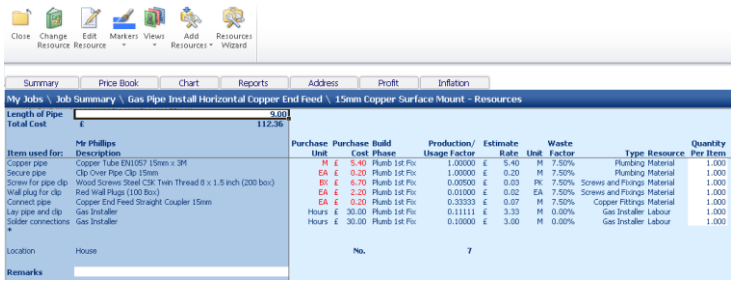
[19] The Resources Wizard is now loaded showing the details of the pipe, the connections and the clips to mount the pipe to the wall. You will notice that the **Total Cost including Wastage** is set to £0.00. This is because we haven't set the length of pipe required. We will do this shortly.





[20] Press **Close** or **Finish** to close the **Resources Wizard.**

[21] At the top of the page you can see that the **Length of Pipe** is set to 0. Change this to 9 to allow for 9m of pipe and press **Enter** on your keyboard.



VIEWING THE OUTPUT FOR THE GAS PIPES

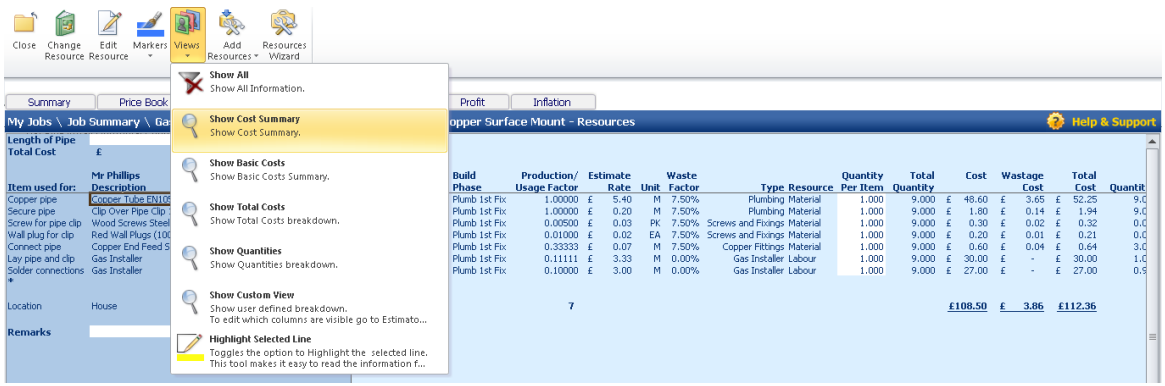
5.00 Minutes

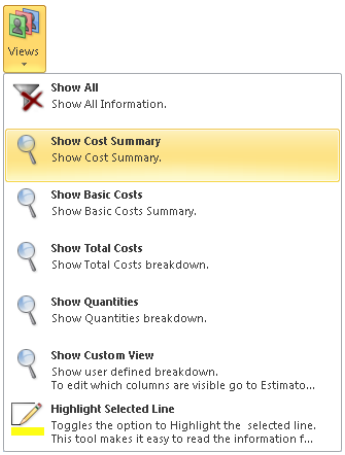
In this section of the tutorial, you will look at the output that **EstimatorXpress®** produces.

EstimatorXpress® has costed and produced a schedule of **Materials**, **Labour** and **Plant** required for fitting the 9 metres of 15mm copper gas pipes, including costs and an allowance for wastage.

[22] You will see that **EstimatorXpress®** has calculated the order quantities and costs associated with all the **Material** and **Labour** , including an allowance for wastage for all of the **Horizontal 15mm Copper End Feed Gas Pipes**. Scroll across the screen with the horizontal scroll bar to see all of the data.

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





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

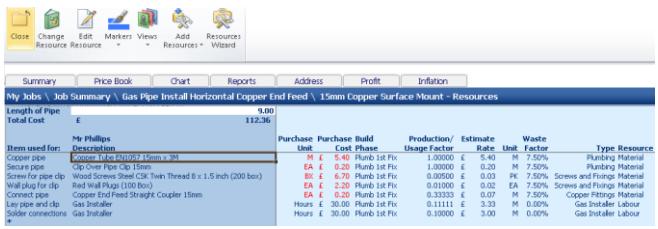
If you press **Show Basic Costs** button from the **Views** drop-down menu, you will see basic cost information including Purchase Unit, Cost per Purchase Unit and No. of Units required for each **Resource.**

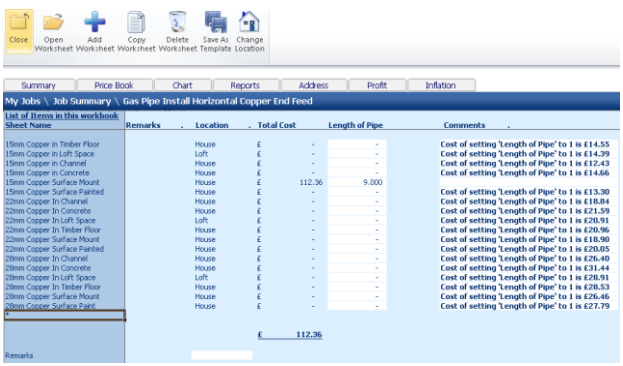
If you press **Show Total Costs** button from the **Views** drop-down menu, you will see extended cost information including Estimated Units Required, Total Quantities including Wastage, and Total Cost for each **Resource.**

If you press **Show Quantities** button from the **Views** drop-down menu, this shows Total Quantities of materials required including wastage for each **Resource.**

If you press **Show All,** this shows you all the **Resources Output** for the estimate relating to **Gas Pipes.**

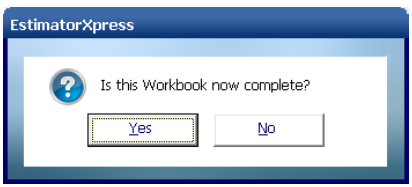
[24] Assuming you are satisfied with the estimate output for your Gas Pipes press the **Close** button to return to the **Summary of Gas Pipe Install Horizontal Copper End Feed Workbook**.



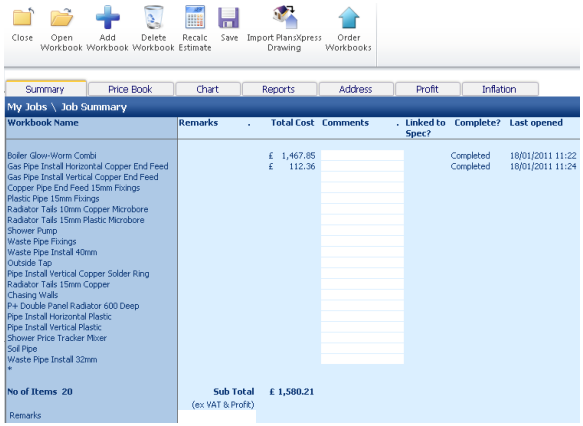


[25] Now, to return back to the **Job Summary**, again press the **Close** button. This will automatically save your **Gas Pipe Install Horizontal Copper End Feed Workbook**.

[26] A dialog box pops up asking if this item (**Gas Pipe Install Horizontal Copper End Feed**) is now complete. Click **Yes**. *(This marks the* **of Gas Pipe Install Horizontal Copper End Feed** *"Complete" in the* ***Job*** *Summary Screen)*

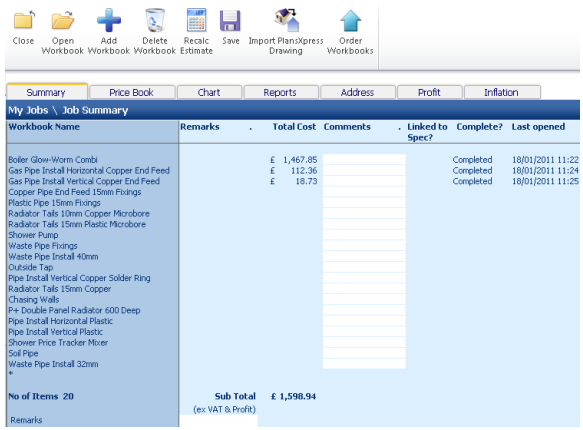


You will now see a final cost for your **Gas Pipe Install Horizontal Copper End Feed Workbook** as part of your overall estimate in the **Job Summary** screen.



[27] Now as an exercise, using steps 16-26 as a guide, estimate for the **Gas Pipe Install Vertical Copper End Feed Workbook**. In this **Workbook** we need to allow for a surface mounted gas pipe to run up from the ground to the boiler which is mounted 1500mm from the ground. You will need to set the **Length of Pipe** of **15mm Copper Surface Mount** to *1.5*.

[28] Your **Job Summary Screen** should now look like this with the cost of three **Workbooks** totalled at the bottom.



If you wish to stop and close the current Estimate:

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

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

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

COPPER PIPE END FEED 15MM FIXINGS

5.00 Minutes

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

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

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

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

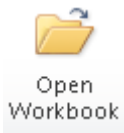
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever you called the **Job** when you created it.

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

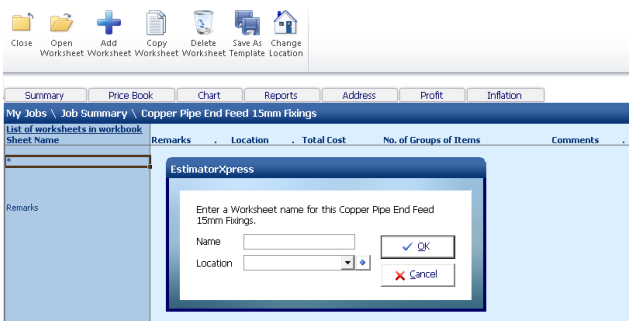
This tutorial leads you through the estimating of the **Copper Pipe End Feed 15mm Fixings**.

The **Copper Pipe End Feed 15mm Fixings** is an example of a **Workbook** with a **Dimensions Wizard** to which you add any **Sundry items** that you require. (See page 16 for an explanation of this.) The **Copper Pipe End Feed 15mm Fixings Workbook** allows you to enter the quantities of all the common 15mm End Feed fixings plus there is a sundry area for if you need to enter any special fixings that are not given as an option by default.

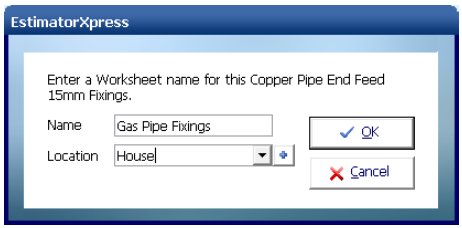
[1] To start estimating your **Copper Pipe End Feed 15mm Fixings** in the **Job Summary** screen, select **Copper Pipe End Feed 15mm Fixings**.



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

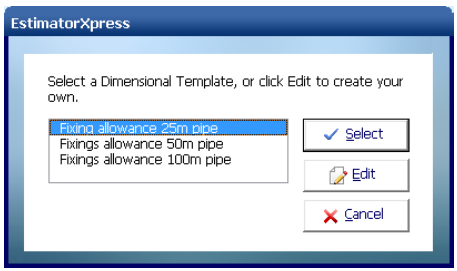


[3] You are now transferred to **Summary of Copper Pipe End Feed 15mm Fixings Workbook** and a dialog box will automatically pop up asking you to give a name and a location for a new **Worksheet**. This is because this **Workbook** doesn't have any **Worksheets** set up yet so it prompts you to create one.



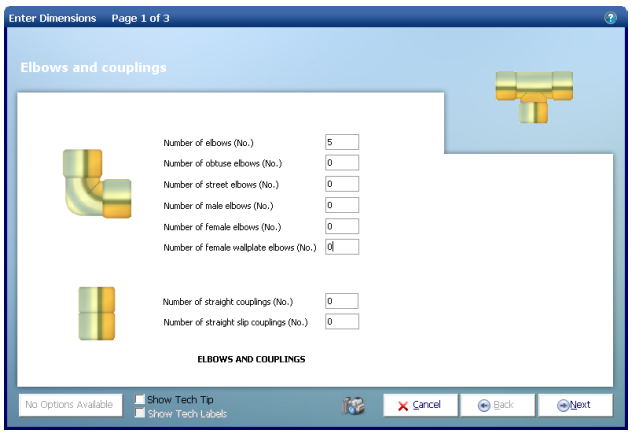
[4] Enter **Gas Pipe Fixings** or any name you think is sensible and then select **House** for location. Click **OK.**

[5] **EstimatorXpress®** transfers you to the **Gas Pipe Fixings Worksheet Dimensions** screen.



[6] Another dialog box will automatically pop up asking you to select a template. These templates provide a starting point for you to enter the amount of each type of fixing that you require. It doesn't matter if there is not a template that matches your exact requirements as everything can be changed once you've selected a starting point. Because we only have a short length of pipe to fix choose the **Fixing Allowance 25m pipe** template**.**

[7] Click **Select.**

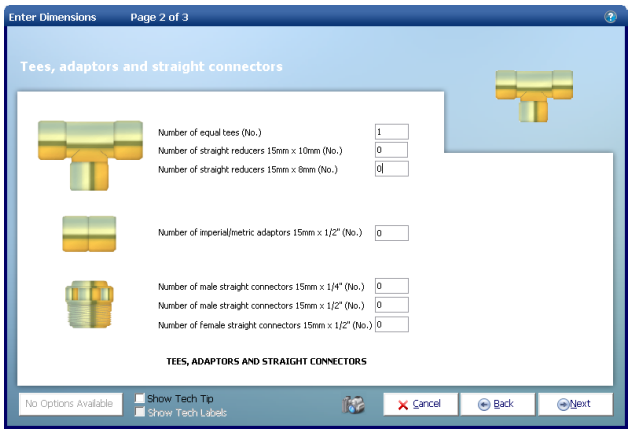


[8] **EstimatorXpress® Dimensions Wizard** will automatically open up a dialog box containing drawings to assist you in entering and confirming the quantities of each fixing that you require.

[9] Work your way through the fixings on screen confirming the quantities required. Set the **Number of Elbows** to 5 and the rest of the fixings to 0. You can press **Enter** to jump to the next box after making any changes necessary.

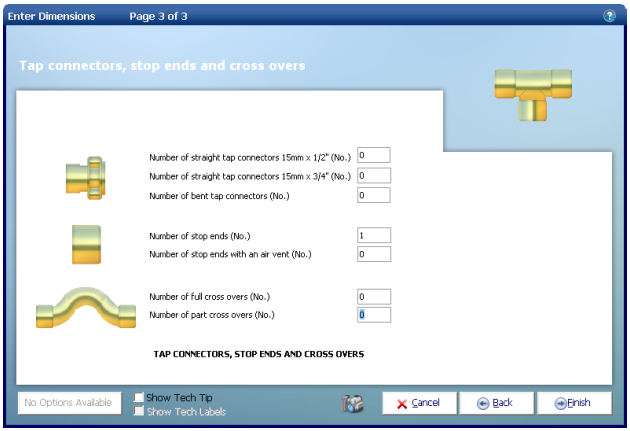
NOTE: The **Gas Pipe Install Vertical Copper End Feed Workbook** allowed for one straight coupling for every 3 metres of pipe estimated. The wizard allows you to include any you will need in addition to those.

[10] Once you have entered all the appropriate quantities click **Next.**

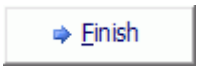


[11] Work your way through page 2 of the wizard confirming any tees, adaptors or straight connectors required.

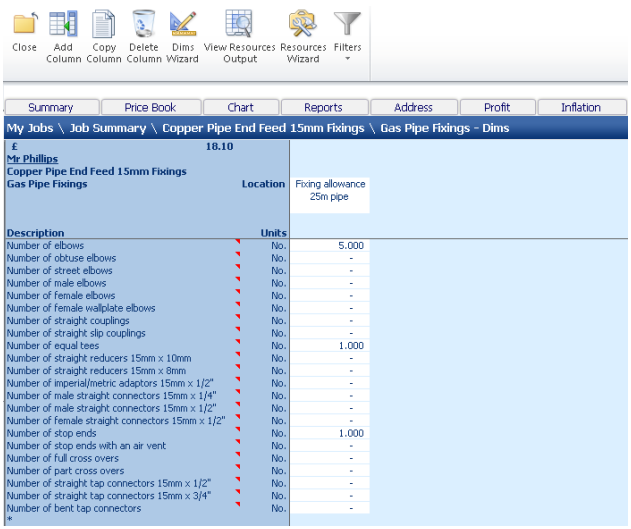
Click **Next.**



[12] On the final page of the **Dimensions Wizard**, set the quantity of tap connectors, stop ends and full or part crossovers required.



[13] Click **Finish** to calculate the price (including labour to fit them) of the items you have chosen to include in your estimate.

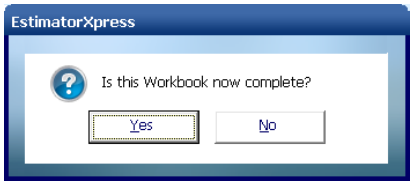


[14] **EstimatorXpress®** then transfers you back into the **Gas Pipe Fixings Worksheet Dimensions Screen** showing the quantities you have just entered in the white column. At the top of the screen is the price that you have estimated for the Gas Pipe Fixings to be purchased and fitted.

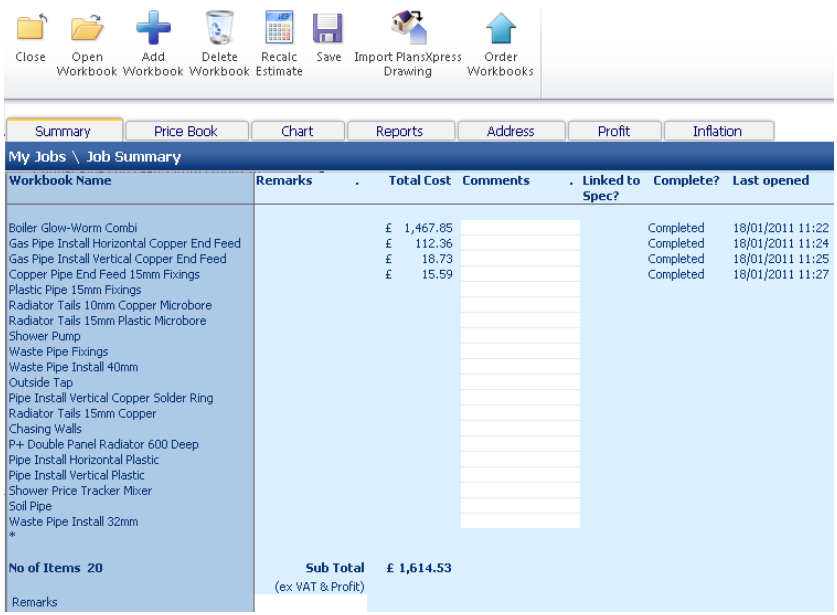
[15] Press the **Close** button to return to the **Summary of Copper Pipe End Feed 15mm Fixings Workbook.**

You will now see a final cost for the **Copper Pipe End Feed 15mm Fixings Workbook** on screen.

[16] Now to return back to the **Job Summary** screen, press the **Close** button. This will automatically save your **Copper Pipe End Feed 15mm Fixings Workbook**.



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



You will now see a final estimate costing for your **Copper Pipe End Feed 15mm Fixings** as part of the overall estimate cost on screen.

If you wish to stop and close the current Estimate:

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

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

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

RADIATORS

10.00 Minutes

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

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

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

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

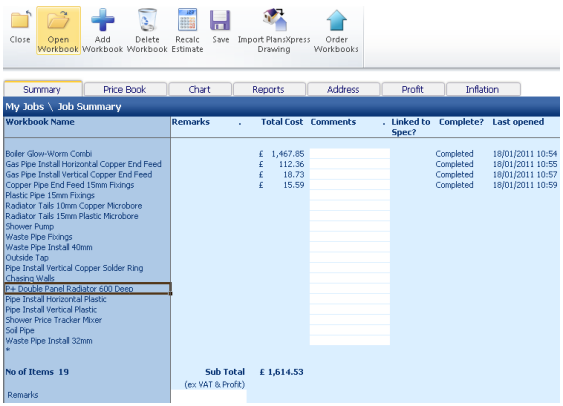
2. This will transfer you to the **My Jobs** screen. Click on the **Job** called Mr Phillips or whatever you called the **Job** when you created it.

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

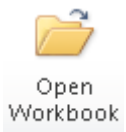
This tutorial leads you through the estimating the **Radiators** and **Radiator Tails.**

There are numerous radiator **Workbooks** in **EstimatorXpress®** which are broken down by style (K1, K2 or P+) and by the height of the radiator. Each are composite **Workbooks** that cover the cost of the radiator including brackets and the cost of hanging them. There are several different widths of radiator set up in each **Workbooks** so that once you've chosen the style and height of radiator required, all you need to do is set how many of each width are needed for your system.

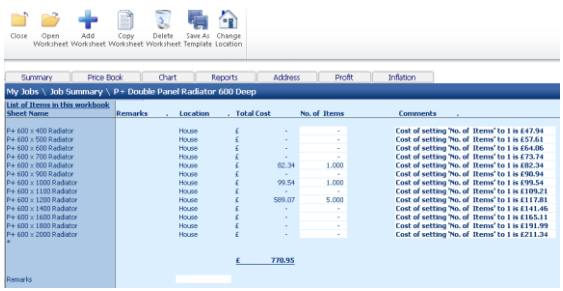
NOTE: The radiator valves and tails (the length of pipe that connects the radiator valve to the main flow/return pipe work of the heating system) are estimated separately. We will move onto them after we've included for our radiator units.



[1] For this example we will use P+ Radiators which are 600mm deep. To start estimating the **Radiators,** select **P+ Double Panel Radiator 600 Deep Workbook** from the left-hand side of the **Job Summary** screen with your mouse.



Press the **Open Workbook** button



[2] You are then transferred to the **Summary of P+ Double Panel Radiator 600 Deep Workbook.** A number of different widths of radiators have been set up as **Worksheets**. Each **Worksheet** contains the radiator with bracket, the plugs and screws for fixing the brackets to the wall and the labour to hang the radiators. To see the specified resources and check the time allowed to hang any of the radiators you can select any **Worksheet** and press **Open Worksheet**.

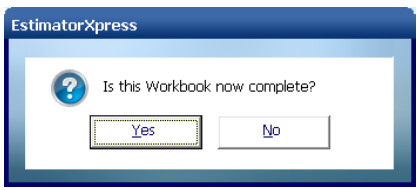
[3] We require 5 radiators 1200mm wide, 1 radiator 1000mm wide and 1 800mm wide. Enter these quantities in the relevant boxes in the **No. of Items** column.

[4] You will see the total cost that has been allowed for the radiators is totalled up at the bottom of the list of **Worksheets**.

[5] To return back to the **Job Summary screen**, press the **Close Workbook** button. This will automatically save your **P+ Double Panel Radiator 600 Deep Workbook.**

[6] A dialog box pops up asking if this item is now complete.

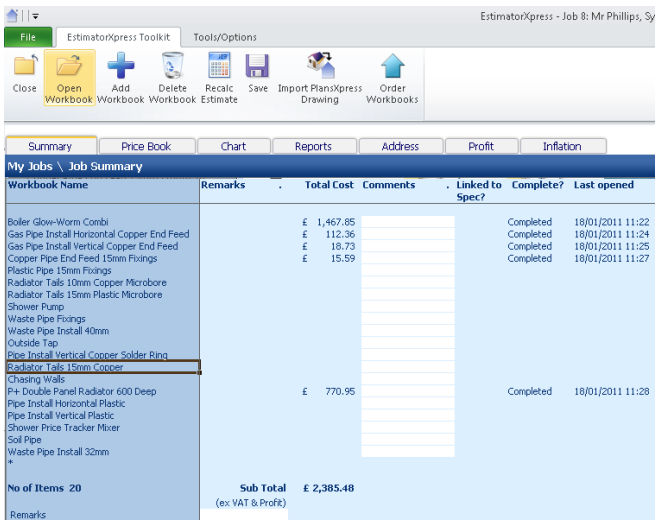
Click **Yes**.



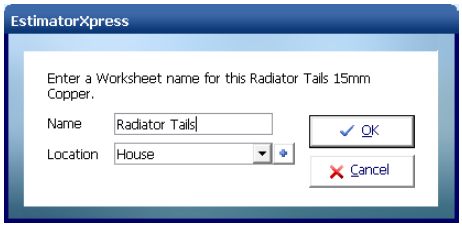
[7] You will now see a final estimate cost for your **P+ Double Panel Radiator 600 Deep Workbook** on the **Job Summary** screen.

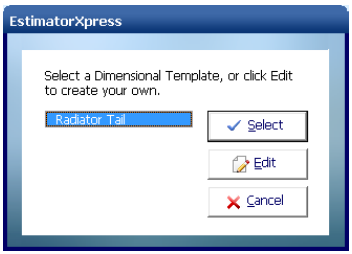
[8] Select **Radiator Tails 15mm Copper Workbook** from the list of **Workbooks** on the Job Summary screen.

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



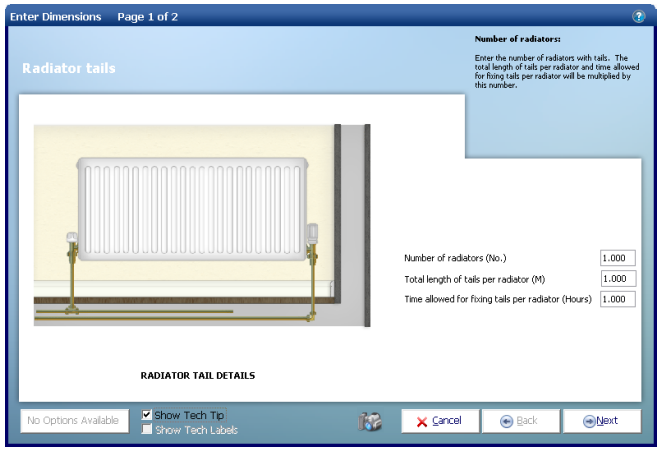
[10] A dialog box pops up asking for the name and location for the first **Worksheet** in the **Radiator Tails 15mm Copper Workbook**. Enter a suitable name such as *Radiator Tails* and a suitable location such as *House.*





[11] Another dialog box will automatically pop up asking you to select a template. Select the template entitled **Radiator Tail** and click **Select.**

[12] **The Dimensions Wizard** will pop up. If you are unsure of what to enter into any of the text boxes you can click the **Show Tech Tip** tick box at the bottom of the **Dimensions Wizard** to display extra explanation in the top right of the **dialog box**.

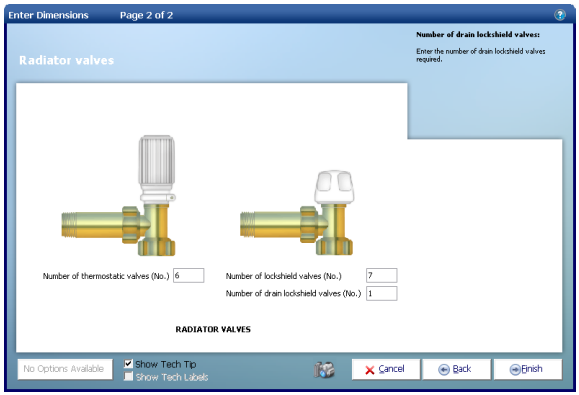


[13] Enter the **Number of radiators** as *7*. As explained in the tech tip the length of tails and time allowed to fit the radiators will be multiplied by this to produce an estimate. You therefore need to enter an average length of tail per radiator.

[14] Set the **Total length of tails per radiator** to *1*.

[15] Review the **Time allowed for fixing tails per radiator** and adjust it as required.

[16] Click **Next.**



[17] Page 2 of the wizard allows you to pick how many valves are required.

[18] Set the **Number of thermostatic valves** to 6.

[19] Set the **Number of lockshield valves** to 7.

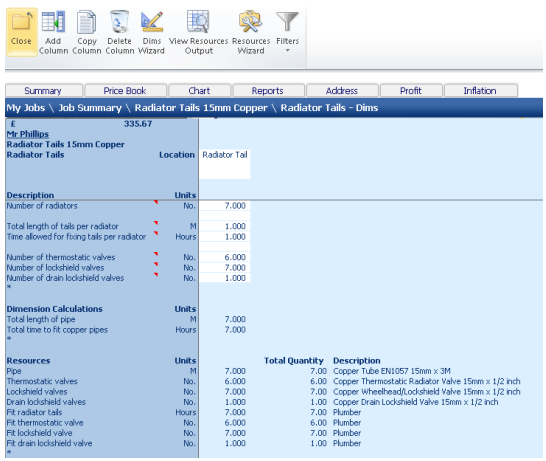
[20] Set the **Number of drain lockshield valves** to 1.

[21] Click **Finish**.

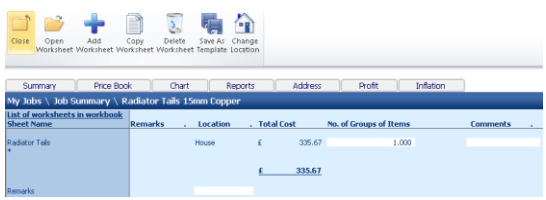
Resources	Units		Total Quantity	Description
Pipe	M	7.000	7.000	Copper Tube EN1057 15mm x 3M
Thermostatic valves	No.	6.000	6.000	Copper Thermostatic Radiator Valve 15mm x 1/2 inch
Lockshield valves	No.	7.000	7.000	Copper Wheelhead/Lockshield Valve 15mm x 1/2 inch
Drain lockshield valves	No.	1.000	1.000	Copper Drain Lockshield Valve 15mm x 1/2 inch
Fit radiator tails	Hours	7.000	7.000	Plumber
Fit thermostatic valve	No.	6.000	6.000	Plumber
Fit lockshield valve	No.	7.000	7.000	Plumber
Fit drain lockshield valve	No.	1.000	1.000	Plumber

[22] Review the resources being used in the resources section at the bottom of the screen. If you wish to make any changes you can click on the **Resources Wizard** button at the top of the screen.

[23] Click Close to return to the **Summary of Radiator Tails 15mm Copper Workbook.**

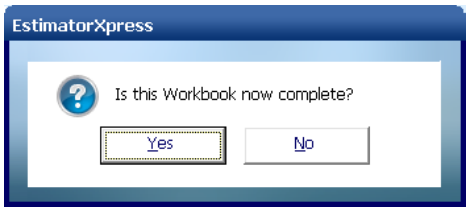


[24] To return back to **Job Summary**, press **Close Workbook** button. This will automatically save the **Radiator Tails 15mm Copper Workbook**.

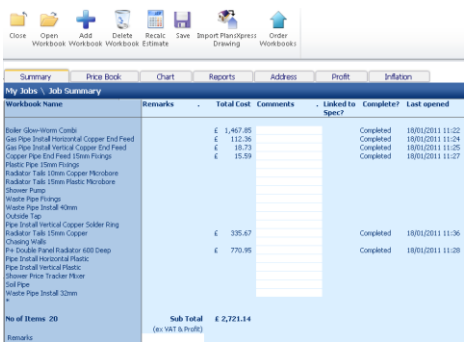


[25] A dialog box pops up asking if this item is now complete.

Click **Yes**.



[26] You will now see a final estimate cost for your **Radiator Tails 15mm Copper Workbook** on the **Job Summary** screen with a sub-total of all the work we've priced for thus far.



If you wish to stop and close this current Estimate:

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

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

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

BATHROOM

15.00 Minutes

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

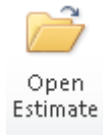
If you have joined this tutorial after having closed **EstimatorXpress®**, follow the steps below:

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

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

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

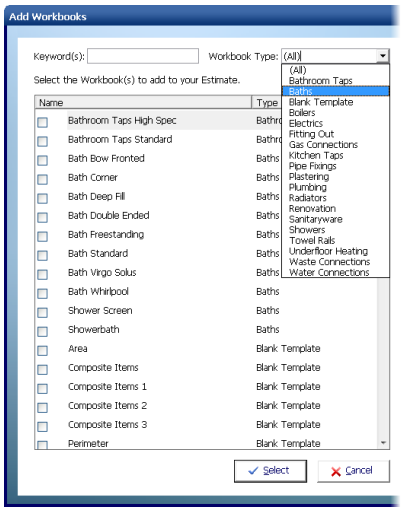
3. Press the` **Open Estimate** button. You are now ready to start the next tutorial.

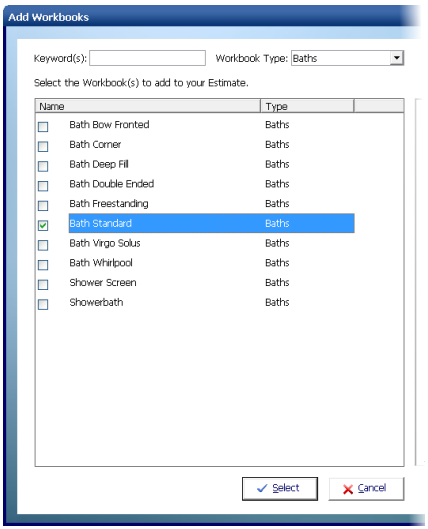


This tutorial leads you through estimating of bathroom furniture including the bath, sanitaryware, taps and an electric shower.

[1] Firstly we will estimate for a bath. There are numerous bath **Workbooks** available to you. To choose a bath to use, click **Add Workbook**.

[2] From the **Workbook Type** filter at the top of the dialog box select **Baths**.

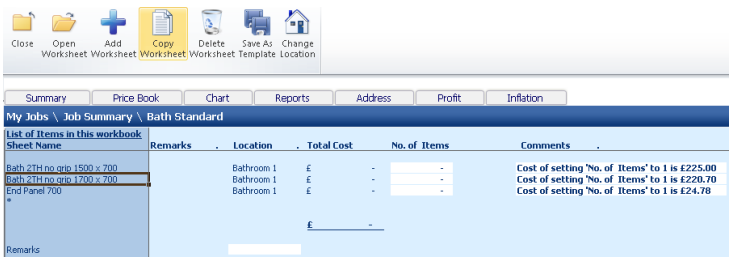




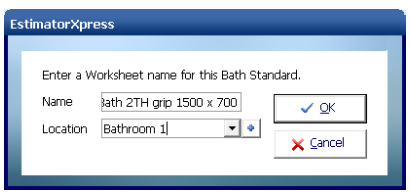
[3] Choose a bath **Workbook** by clicking on the **Workbook** to put a tick next to it. For this example we will use the **Bath Standard Workbook**.

[4] Select the **Bath Standard Workbook** then press the **Open Workbook** button.

[5] You are then transferred to the **Summary of Bath Standard Workbook**. We are going to have a 1500mm x 700mm bath with grips and space for 2 taps. As you can see there is no sheet set up for this so we are going to create a new **Worksheet**. Instead of starting from scratch we will copy a similar **Worksheet** and edit it from there to suit our needs.

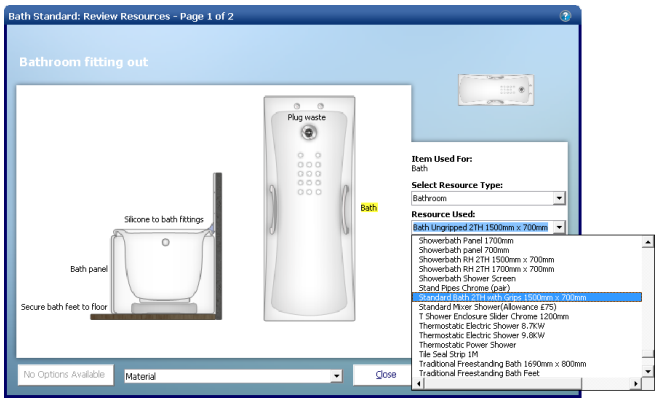


[6] Select **Bath 2TH no grip 1500 x 700** and click the **Copy Worksheet** button.

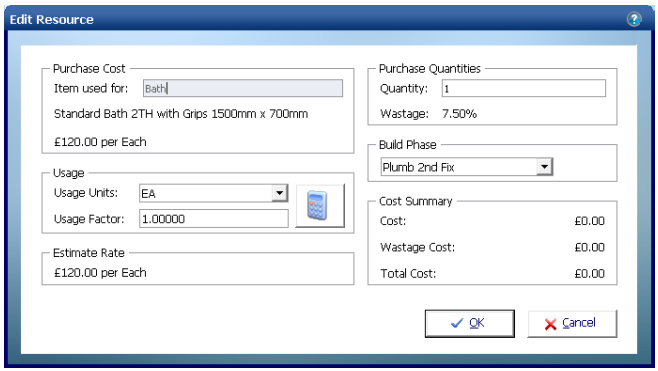


[7] **Name** the new sheet *Bath 2TH grip 1500 x 700* with a **location** of *Bathroom 1*.

[8] You are transferred to the **Bath 2TH grip 1500 x 700 Worksheet** and the **Resource Wizard** automatically loads. The Bath has been highlighted. In the **Resource** dropdown select the product that we added in to the **Price Book** on page 28, the **Standard Bath 2TH with Grips 1500mm x 700mm.**

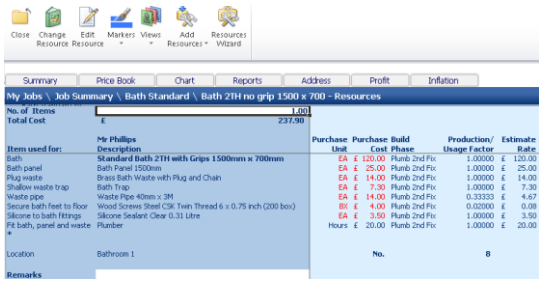


[9] A dialog pops up asking you to confirm the product change. Check the details on the page and click **Ok**.



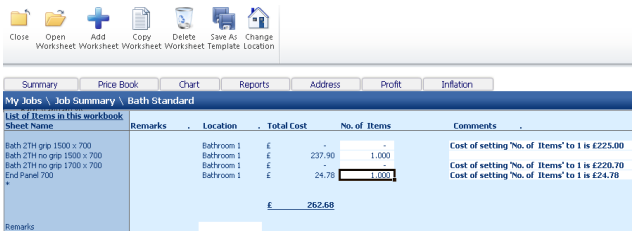
[10] All of the other details should be set correctly from the original bath that we copied but review them to make sure.

[11] Click **Close** to close the **Resource Wizard**.



[12] You will notice that there is no price currently for our bath. This is because the **No. of Items** for the **Worksheet** is set to *0*. Change this to*1*.

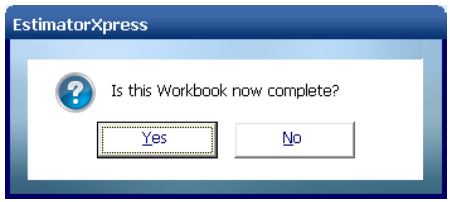
[13] Click **Close** to return to the **Summary of Bath Standard Workbook**.

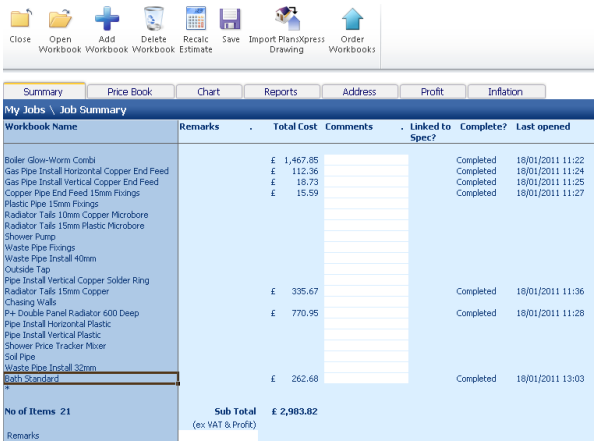


[14] We also need one end panel for our bath so set the **No. of Items** for **End panel 700** to *1*.

[15] We have now selected our bath and end panel so click **Close** to return to the **Job Summary** screen.

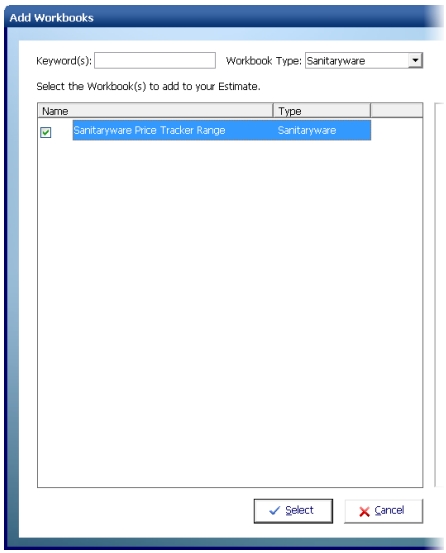
[16] Click **Yes** when asked 'Is this **Workbook** now Complete?'





You will now see a final estimate cost for your **Bath Standard Workbook** on the **Job Summary** screen with a sub-total of all the work we've priced for thus far.

[17] Next we are going to choose our sanitaryware. Depending on which merchant partner(s) you have subscribed to you will have a varying number of sanitaryware **Workbooks** in your system. To subscribe to any of our merchant partners ring HBXL on 0845 1234 085. To choose a sanitaryware range to use, click **Add Workbook**.

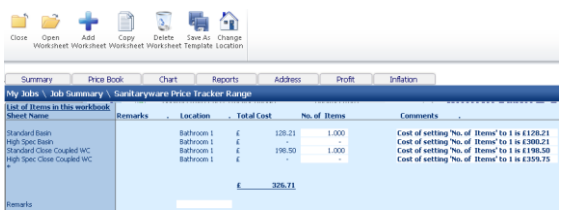


[18] From the **Workbook Type** filter at the top of the dialog select **Sanitaryware**.

[19] Tick a suitable sanitaryware range. To follow this tutorial select **Sanitaryware Price Tracker Range**.

[20] Select the **Sanitaryware Price Tracker Range Workbook** and click **Open Workbook**.

You are transferred to the **Summary of Sanitaryware Price Tracker Range Workbook**. You will see that there are already **Worksheets** set up for various sanitaryware items.

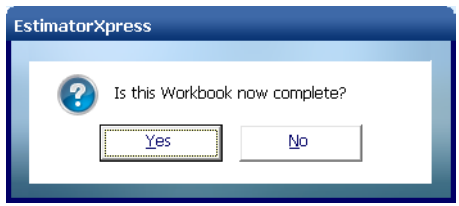


[21] Set the **No. of Items** for a **Standard Basin** and a **Standard Closed Coupled WC** to *1* to include them in the estimate.

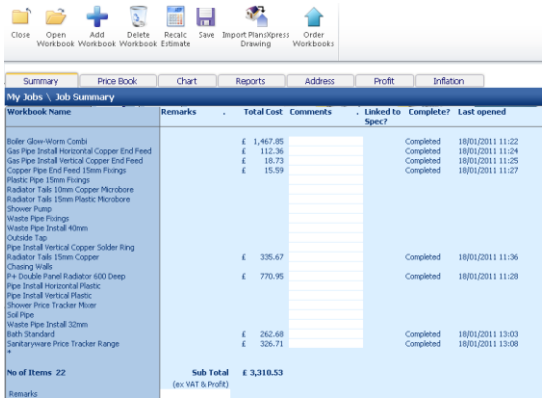
If you wish to review the materials and labour being included in either of these items you can select the **Worksheet** and press **Open Worksheet** to launch the **Resource Wizard**.

[22] We have now selected our sanitaryware items so click **Close** to return to the **Job Summary** screen.

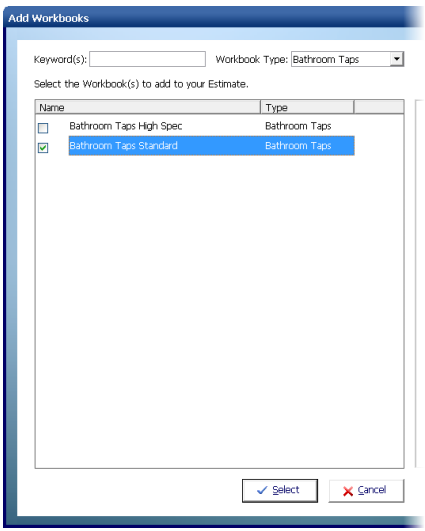
[23] Click **Yes** when asked 'Is this **Workbook** now Complete?'



You will now see a final estimate cost for your **Price Tracker Sanitaryware Workbook** on the **Job Summary** screen with a sub-total of all the work we've priced.



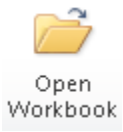
[24] Next we are going to choose our taps for the basin and the bath. Depending on which merchant partner(s) you have subscribed to you will have a varying number of bathroom taps **Workbooks** in your system. To subscribe to any of our merchant partners ring HBXL on 0845 1234 085. To choose a range of bathroom taps to use to use click **Add Workbook**.



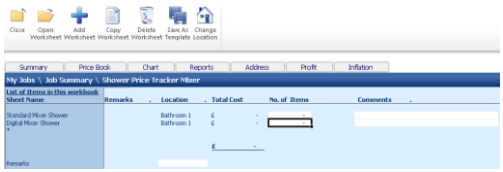
[25] From the **Workbook Type** filter at the top of the dialog select **Bathroom Taps**.

[26] Tick a suitable bathroom taps range. To follow this tutorial select **Bathroom Taps Standard**.

[27] Referring to steps 20-23 if required, go into the **Bathroom Taps Standard Workbook** and select one **Basin Taps Pair** and one **Bath Taps Pair**. Each pair of bathroom taps has copper pipes included to fix to the main water feed. We will estimate the main feed to the bathroom in the **Pipe Install Horizontal Plastic** and **Pipe Install Vertical Plastic Workbooks**.



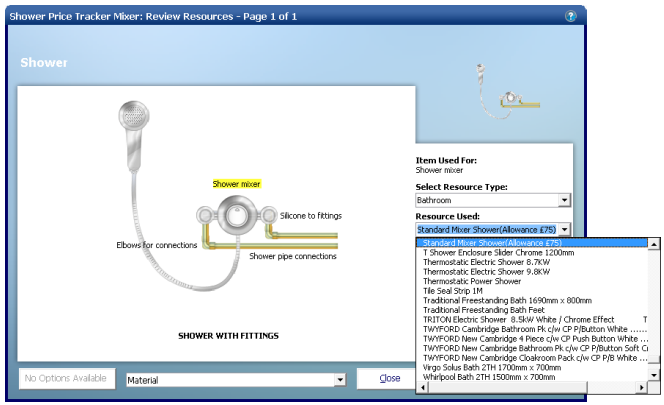
[28] To complete estimating our new bathroom select the **Shower Price Tracker Mixer Workbook** and click **Open Workbook**.



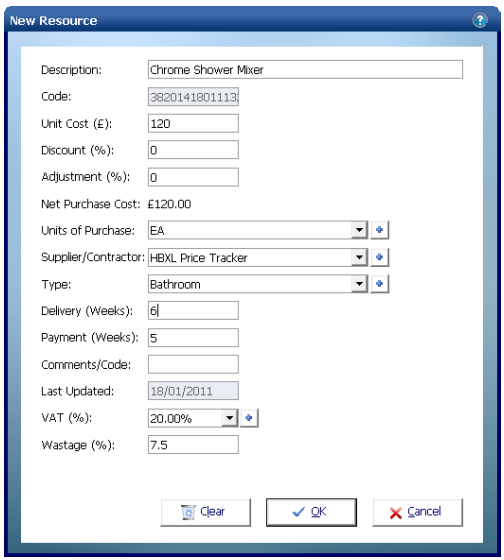
[29] We require one standard mixer shower but let us first check what is included in the way of connections for the shower. Select the **Standard Mixer Shower Worksheet** and press **Open Worksheet**.

[30] The **Resource Wizard** will be automatically loaded. By clicking on the different descriptions around the picture you can see which resources are specified and what quantities of each resource have been included in your estimate.

[31] By clicking on **Shower mixer** you can see that an allowance of £75 has been allowed for our shower. Let's now specify a different shower unit that costs £120. Click on the **Resource Used** dropdown to see if there is a suitable alternative. There isn't currently so we shall add a new shower into our **Price Book**.

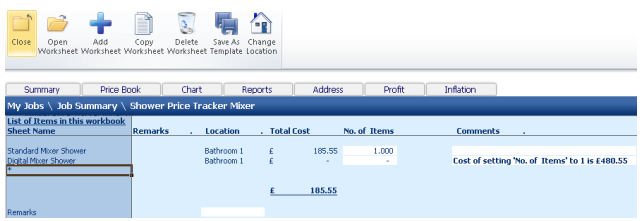


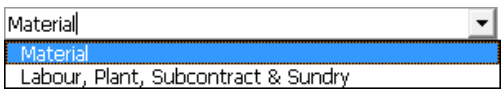
[32] Click the right mouse button over the description of the currently selected shower and select **Add Resource** from the menu that pops up.



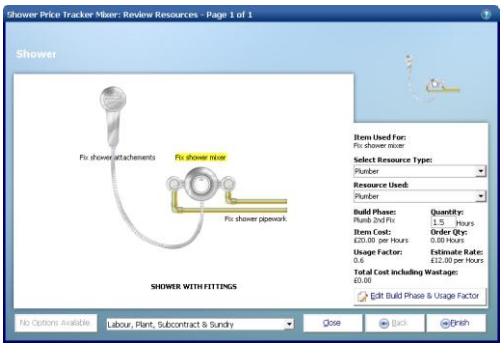
[33] In the **New Resource** dialog box change the **description** to *Chrome Shower Mixer* and change the **Unit Cost** to *120*. Once you have reviewed the other fields and changed any you wish, click **OK.**

[34] The Edit Resource dialog box now pops up for you to confirm the product change to your new shower. Review the information in the dialog then click **OK** to confirm your selection.





[35] We will now review the labour being allowed to fit the shower unit. You should always consider the labour time being allowed when swapping a material. From the **Resource Dropdown** at the bottom of the **Resource Wizard** select **Labour, Plant, Subcontract & Sundry**.

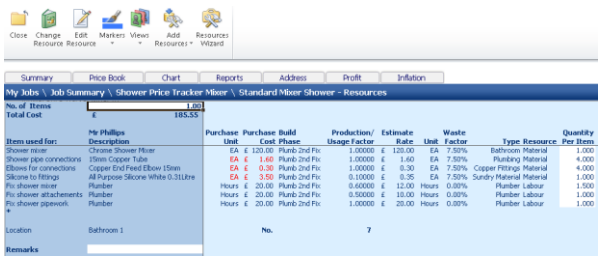


[36] If **Fix shower mixer** isn't already highlighted in yellow, click on it with your mouse.

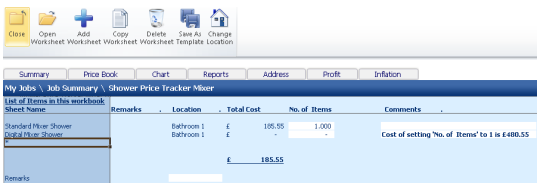
[37] On the right hand side you can see that a quantity of 1 hour has been allowed. Click in the box and change this to *1.5*.

[38] Click **Close** to close the **Resource Wizard.**

[39] You will notice that there is still no price appearing against the **Total Cost** marker. That is because we haven't set the quantity required. Change the **No. of Items** to 1 and the price will appear.

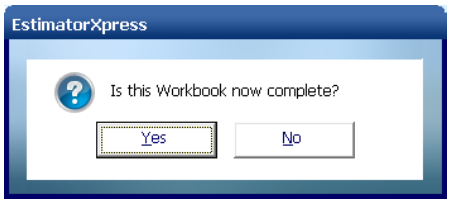


[40] Click **Close** to return to the **Summary Shower Price Tracker Mixer Workbook.**

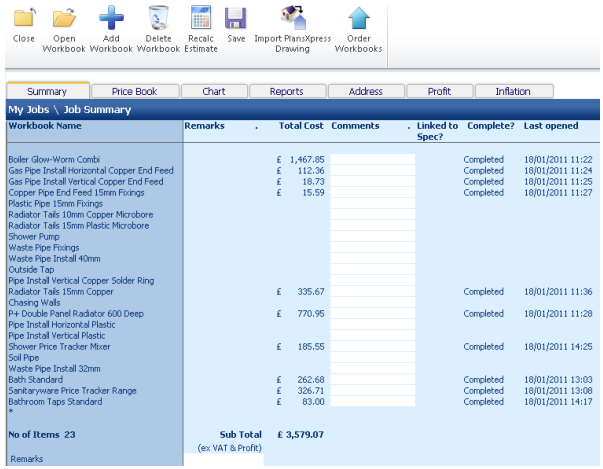


[41] To return back to the **Job Summary**, press the **Close Workbook** button. This will automatically save your **Shower Price Tracker Mixer Workbook.**

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



[43] You have now priced up for all of the bathroom items and the **Job Summary Screen** has the total price of all items costed up to this point.



If you wish to stop and close this current Estimate:

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

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

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

SOIL PIPE & WASTE CONNECTIONS

15.00 Minutes

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

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

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

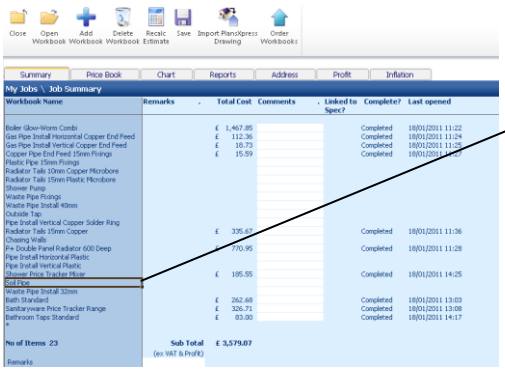
1. Press the **My Estimates** button at the top of the **Main Menu** screen.

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

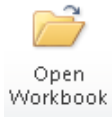
3. Press the **Open Estimate** button. You are now ready to start the next tutorial.

This tutorial leads you through estimating the soil pipe and waste connections of our new bathroom. This will involve putting in the new soil pipe, estimating for the waste pipe to the sink and bath, and finally any waste pipe fixings required. Let's start by estimating for the **Soil Pipe**. As you will see from the plans, on page 20, the soil pipe is concealed within the building and will run up to the back of the bathroom with an air admittance valve on top.

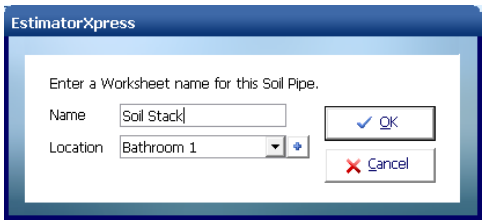
The **Soil Pipe Workbook** is an example of a **Workbook** with a **Dimensions Wizard** to which you add any **Sundry items** that you require. (See page 16 for an explanation of this.) The **Soil Pipe Workbook** allows you to enter the quantities of all the common fixings that may be required plus there is a sundry area for if you need to enter any special fixings that are not given as an option by default.



[1] To start estimating your soil pipe, select the **Soil Pipe Workbook** from inside the **Job Summary.**

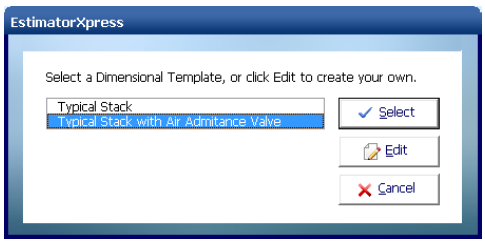


[2] Press the **Open Workbook** button.



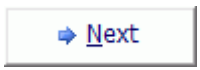
[3] You are now transferred to the **Summary of Drain Runs Workbook** and a dialog box will automatically pop up asking you to name and give a location for the soil stack.

[4] Enter *Soil Stack* as a **name** for this **Worksheet** and then select *Bathroom 1* for **location**. Click **OK.**

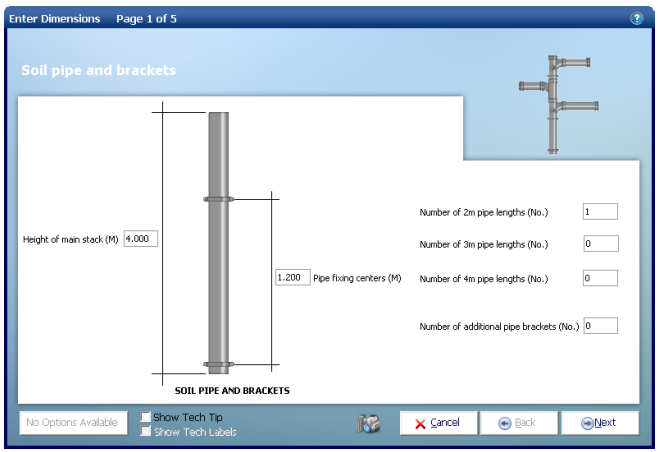


[5] Select the dimensional template **Typical Stack with Air Admittance Valve** and click **Select**.

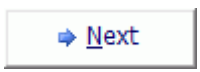
[6] The **Dimensions Wizard** automatically pops up. On page one, enter a **Height of main stack** of *4*. We will also require *one* '2m length of pipe' to connect through the wall to the toilet outlet. Set **Number of 2m pipe lengths** to *1*.



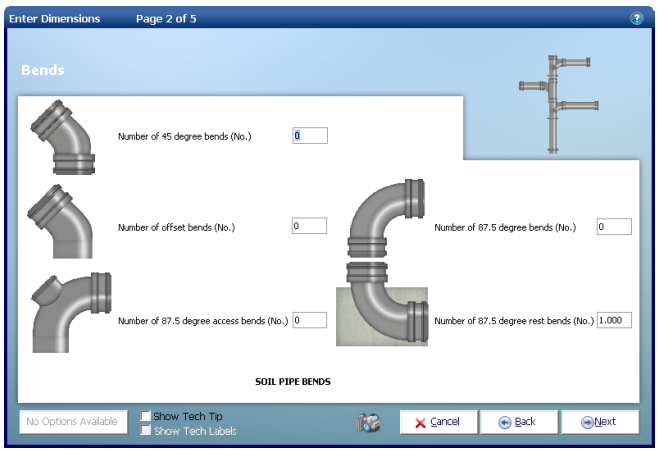
Click **Next**.

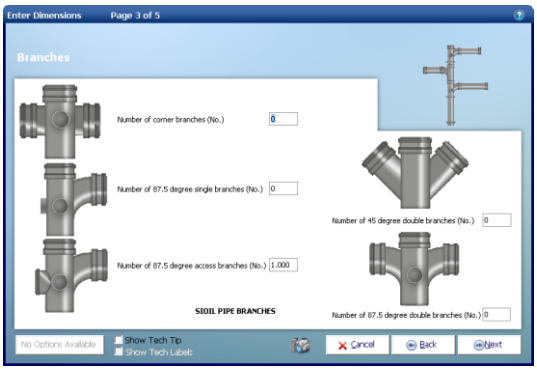


[7] On page 2 of the wizard we need a rest bend for connecting in to the drainage system. Set **Number of 87.5 degree rest bends** to *1* and all other fixings to *0*.



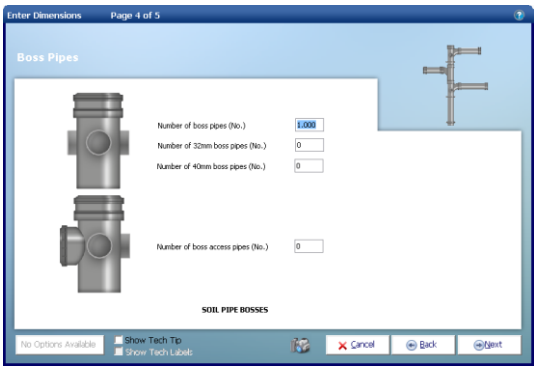
Click **Next**.





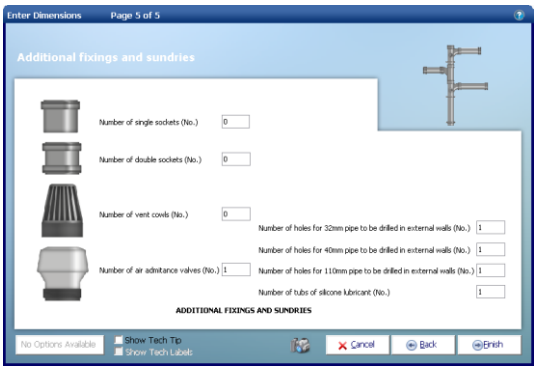
[8] On page 3 set the **Number of 87.5 degree access branches** to 1 and all other fixings to 0.

[9] Click **Next.**



[10] We require one boss pipe to fix our bath and sink waste into the main stack. Set **Number of boss pipes** to 1.

[11] Click **Next.**



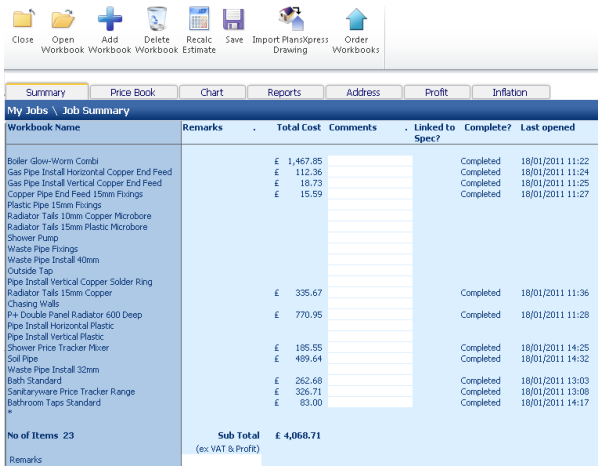
[12] Finally allow for *1* 32mm hole to be drilled for the basin waste, *1* 40mm hole for the bath waste, *1* 110mm hole for the toilet waste and an air admittance valve for the top of the stack. We will also leave the **Number of tubs of silicone lubricant** at *1*.

[13] Click **Finish.**

NOTE: If you wish to review the output from the **Worksheet** to find out how the total cost has been arrived at you can use the **Resource Wizard** or click **View Resources Output**.

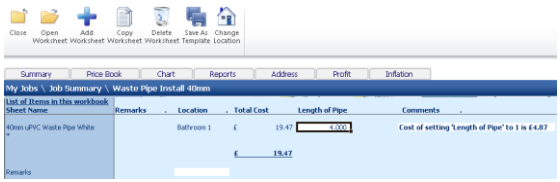
[14] Press the **Close** button to return to the **Summary of Soil Pipe Workbook.**

[15] Press the **Close** button to return to the **Job Summary Screen**. Answer 'Yes' when asked if the **Workbook** is now complete. You will see that the price from your **Soil Pipe Workbook** has been copied to the **Summary Screen** and included in your Job Sub Total.



Next we'll estimate for the waste pipe connecting the bath to the soil pipe. When we estimated for our bath we included a waste trap so we just need to allow for some 40mm pipe to connect it to the boss pipe that we've just estimated.

[16] From the **Job Summary** Screen select **Waste Pipe Install 40mm** and click **Open Workbook**.



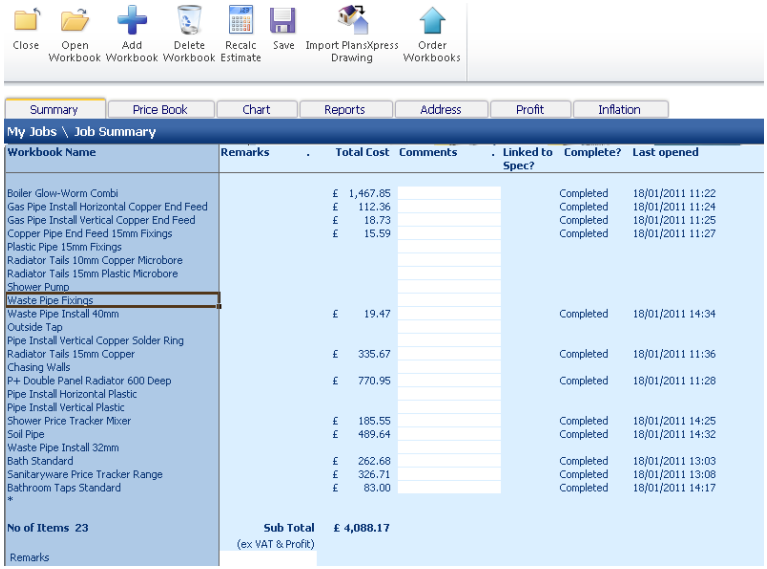
[17] You will see in the **Summary of Waste Pipe Install 40mm Workbook** that there is already a **Worksheet** set up for estimating a length of waste pipe. This includes the pipes and brackets together with the labour to fit them. If you wish to check this detail you can click on **Open Worksheet** to review the resources included using the **Resource Wizard**.

[18] Set the **Length of Pipe** to 4 to allow 4m of pipework to get from our bath waste to the soil pipe outside.

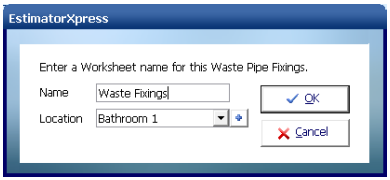
[19] Press **Close** button to return to the **Job Summary Screen**.

[20] Now repeat these steps to allow for 1.5m of 32mm waste pipe for the basin waste using the **Waste Pipe Install 32mm Workbook**.

[21] Finally we will allow for any waste fixings required. Select the **Waste Pipe Fixings Workbook** and press **Open Workbook**.

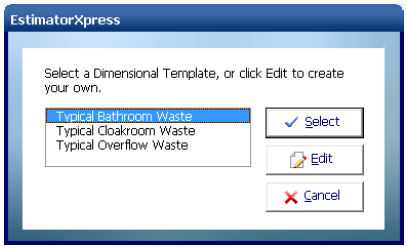


The **Waste Pipe Fixings Workbook** is a **Workbook** with a dimensions section allowing you to enter the quantities of each fixing required, and a sundry area to add in for any additional fixings that aren't covered in the **Workbook** as standard.



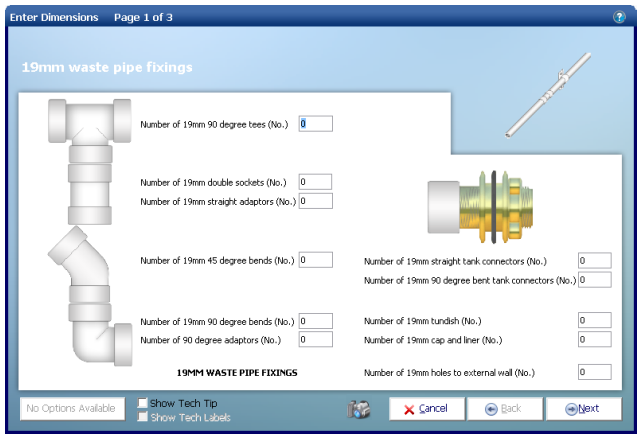
[22] You are transferred to the **Summary of Waste Pipe Fixings Workbook** and a dialog box pops up asking for a name and a location for the first **Worksheet** in the **Workbook**. Enter a **name** of *Waste Fixings* and a **location** of *Bathroom 1*.

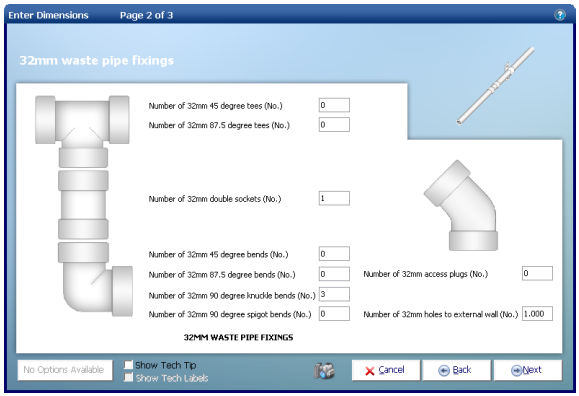
[23] A dialog now pops up asking to pick a dimensional template. Select Typical *Bathroom Waste* and press **Select**.



[24] The first page of the **Dimensions Wizard** allows you to price up for 19mm fixings. We do not have any 19mm pipe so set all of these fixings to *0* and move on to the next page.

[25] Click **Next.**



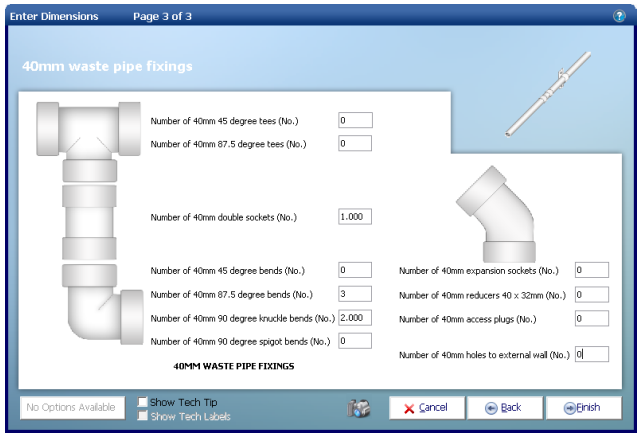


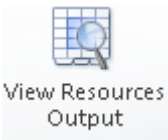
[26] We will allow for 1 double socket and three 90 degree bends to connect our basin waste to our soil pipe. Set **Number of 32mm double sockets** to 1 and set **Number of 32mm 90 degree knuckle bends** to 3. We do not need to allow for drilling a hole through the wall as this has been covered in our **Soil Pipe Workbook**. Ensure all other values are set to 0.

[27] Click **Next.**

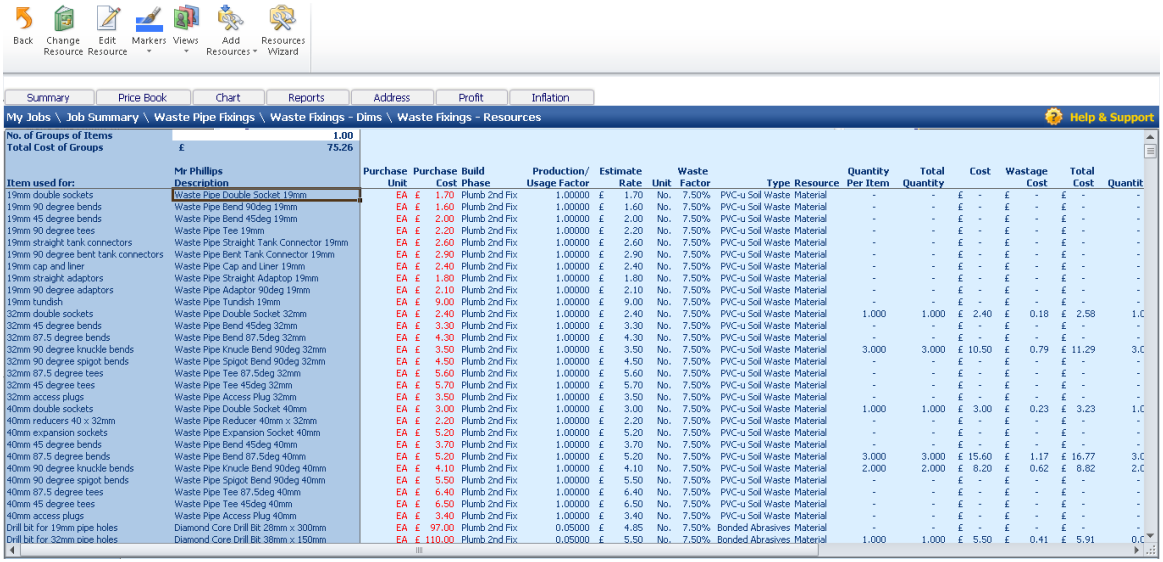
[28] Similarly for 40mm fixings we will allow for 1 double socket and three 90 degree bends to connect our bath waste to our soil pipe. Set **Number of 40mm double sockets** to *1* and set **Number of 40mm 90 degree knuckle bends** to *3*. We do not need to allow for drilling a hole through the wall as this has been covered in our **Soil Pipe Workbook**. Ensure all other values are set to 0.

[29] Click **Finish.**

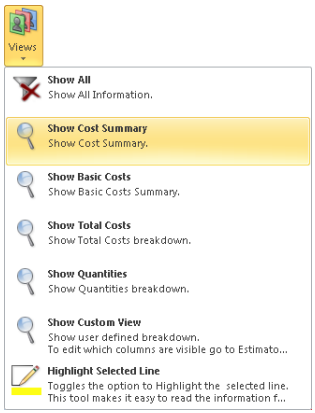




[30] Before you press the **Close** button to return to the **Summary of Waste Pipe Fixings Workbook,** you might want to view the output of your **Waste Pipe Fixings Workbook** by clicking on **View Resources Output** button.



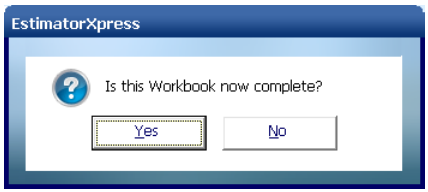
[31] Use the **Views** drop-down menu in the **Resources Output** screen to view the costs and quantities of materials and required to fit the **Waste Pipe Fixings.**



[32] Assuming you are satisfied with the output, press the **Back** button to return to **Waste Pipe Fixings Worksheet Dimensions** screen.

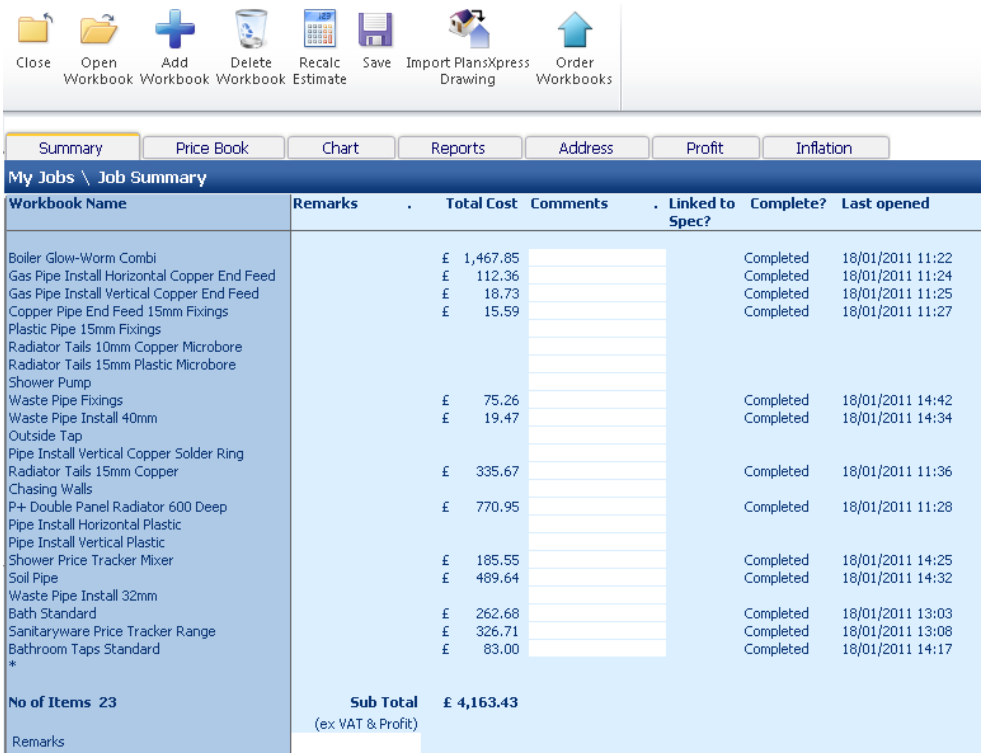
[33] Press the **Close** button to return to the **Summary of Waste Pipe Fixings Workbook**.

[34] Now to return to **Job Summary**, press the **Close** button. This will automatically save your **Waste Pipe Fixings Workbook**.



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

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



Workbook Name	Remarks	Total Cost	Comments	Linked to Spec?	Complete?	Last opened
Boiler Glow-Worm Combi		£ 1,467.85			Completed	18/01/2011 11:22
Gas Pipe Install Horizontal Copper End Feed		£ 112.36			Completed	18/01/2011 11:24
Gas Pipe Install Vertical Copper End Feed		£ 18.73			Completed	18/01/2011 11:25
Copper Pipe End Feed 15mm Fixings		£ 15.59			Completed	18/01/2011 11:27
Plastic Pipe 15mm Fixings						
Radiator Tails 10mm Copper Microbore						
Radiator Tails 15mm Plastic Microbore						
Shower Pump						
Waste Pipe Fixings		£ 75.26			Completed	18/01/2011 14:42
Waste Pipe Install 40mm		£ 19.47			Completed	18/01/2011 14:34
Outside Tap						
Pipe Install Vertical Copper Solder Ring						
Radiator Tails 15mm Copper		£ 335.67			Completed	18/01/2011 11:36
Chasing Walls						
P+ Double Panel Radiator 600 Deep		£ 770.95			Completed	18/01/2011 11:28
Pipe Install Horizontal Plastic						
Pipe Install Vertical Plastic						
Shower Price Tracker Mixer		£ 185.55			Completed	18/01/2011 14:25
Soil Pipe		£ 489.64			Completed	18/01/2011 14:32
Waste Pipe Install 32mm						
Bath Standard		£ 262.68			Completed	18/01/2011 13:03
Sanitaryware Price Tracker Range		£ 326.71			Completed	18/01/2011 13:08
Bathroom Taps Standard		£ 83.00			Completed	18/01/2011 14:17
*						
No of Items 23	**Sub Total** (ex VAT & Profit)	**£ 4,163.43**				
Remarks						

If you wish to stop and close the current estimate:

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

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

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

PIPE WORK

10.00 Minutes

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

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

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

1. Press the **My Estimates** button at the top of the **Main Menu** screen.
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

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

This tutorial leads you through the estimating of the water pipes feeding the radiators and the bathroom from the new boiler. **EstimatorXpress®** contains **Workbooks** for estimating copper, plastic, copper microbore or plastic microbore pipes. For this example we are going to use plastic pipes. We will estimate for horizontally laid pipes, vertically laid pipes, allow for some of the vertical pipes to be chased into existing walls then cover any pipe fixings.

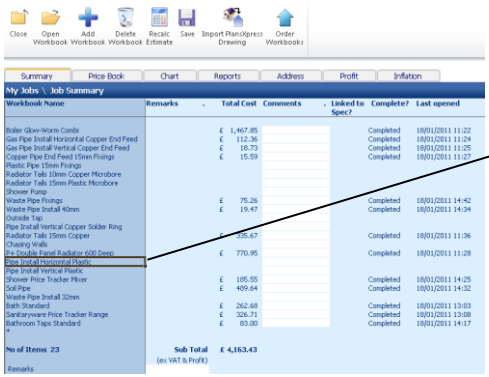
Referring to our plans, on page 20, you will see that there are 22mm pipes running up the side wall of the extension to the first floor to feed the radiators which split down to 15mm once they are in the bathroom. Similarly there are 22mm pipes that run back down a boxed-in concrete wall to feed the ground floor radiators which then split up into 15mm pipes to feed and return. This gives us the following pipe work:

22mm Horizontal Plastic	2 x 2.5m runs in concrete floors = 5m
22mm Vertical Plastic	2 x 2m in concrete = 4m & 2 x 2m in stud wall = 4m
22mm Vertical Copper	2 x 1.5m surface mounted = 3m
15mm Horizontal	35m in a timber floor & 35m in a concrete floor

Similarly looking at the feed for the bathroom hot water, we have a 22mm pipe running from the boiler outlet to the side wall of the extension then up that wall to the bathroom. From there it has a 22mm pipe feeding the bath with a reducing tee feeding the sink on its way past. This will give us the following:

22mm Horizontal Plastic	2.5m runs in concrete floors & 4.5m in timber floor
22mm Vertical Plastic	2m in stud wall
22mm Vertical Copper	1.5m surface mounted

From these quantities we can now go ahead and estimate for all of our pipe runs.

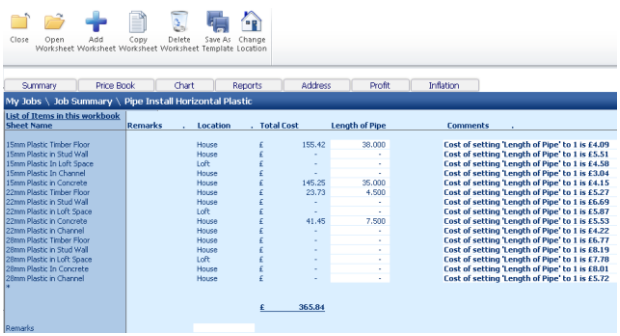


[1] To start estimating your Horizontal pipes you must select the **Pipe Install Horizontal Plastic Workbook** from the **Job Summary**.

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

[3] **EstimatorXpress®** then transfers you into the **Summary of Pipe Install Horizontal Plastic Workbook**.

The **Summary of Pipe Install Horizontal Plastic Workbook** is used to list the range of plastic pipe **Worksheets** that you may have within your estimate such as **15mm Plastic in Channel** or **22mm Plastic in Stud Wall**. Each different size or installation type of pipe must be estimated separately and is listed in this screen. From our calculations above we can estimate for our horizontal pipes.



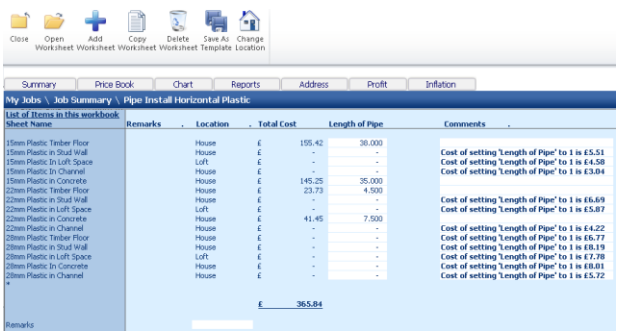
[4] Enter a **Length of Pipe** for **15mm Plastic in Concrete** of *35*.

[5] Enter a **Length of Pipe** for **15mm Plastic Timber Floor** of *38*.

[6] Enter a **Length of Pipe** for **22mm Plastic in Concrete** of *7.5*.

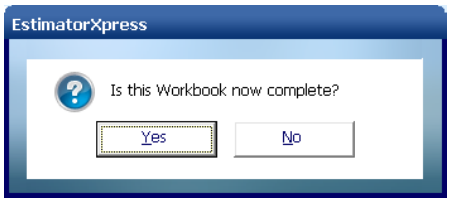
[7] Enter a **Length of Pipe** for **22mm Plastic in Timber Floor** of *4.5*.

NOTE: To confirm the material and labour resources being used in any of these **Worksheets** you can highlight the **Worksheet** and press **Open Workbook** to load the **Resources Wizard** for that **Worksheet**.



[8] Now to return to the **Job Summary**, press the **Close** button. This will automatically save your **Pipe Install Horizontal Plastic Workbook**.

[9] Answer **Yes** when asked if this **Workbook** is complete.



Now we'll go through exactly the same process for the vertical pipes.

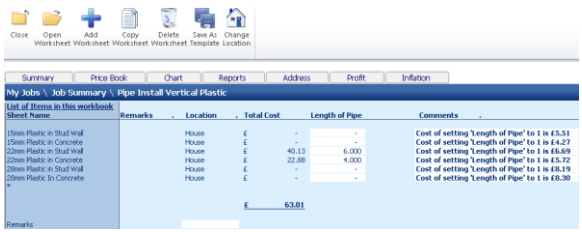
[10] Select the **Pipe Install Vertical Plastic Workbook** and press the **Open Workbook** button.

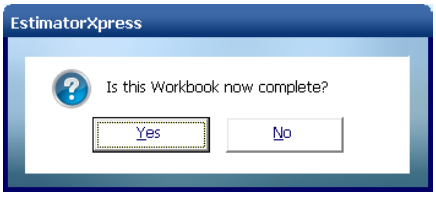
Again we have a list of all of the typical sizes and installation types of pipe at our disposal. If you needed to use a 32mm pipe you can select a 28mm pipe **Worksheet** then use the **Copy Worksheet** button in order to use it as a template. From there you will only need to change the resources such as the pipe and clips and review the amount of labour allowed to fit each metre of pipe.

[11] Enter a **Length of Pipe** for **22mm Plastic in Stud Wall** of *6*.

[12] Enter a **Length of Pipe** for **22mm Plastic in Concrete** of *4*.

[13] Now to return to the **Job Summary**, press the **Close** button. This will automatically save your **Pipe Install Vertical Plastic Workbook**.

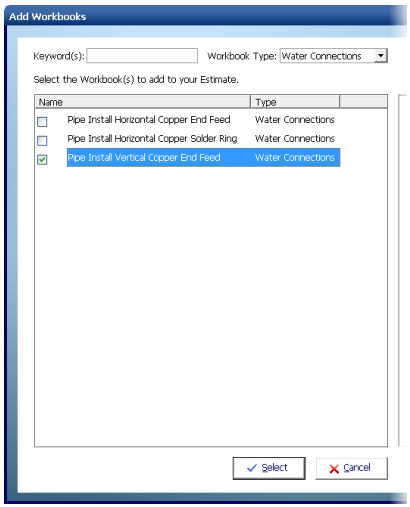




[14] Answer **Yes** when asked if this **Workbook** is complete.

Finally there are some wall mounted copper pipes that run from the concrete floor up to the boiler at a height of 1.5m. We do not currently have a suitable **Workbook** to price up this work so we will need to get one from the library.

[15] Press the **Add Workbook** button to make the **Add Workbook** dialog box pop up.



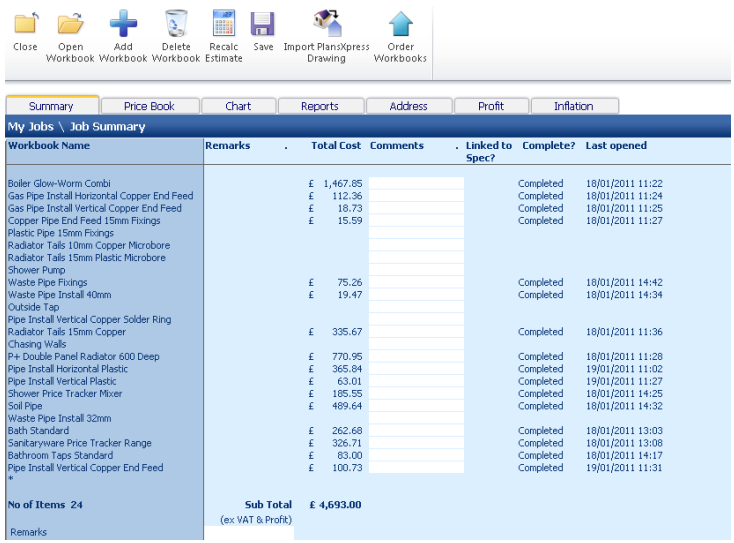
[16] From the **Workbook Type** filter box at the top of the dialog, select **Water Connections**.

[17] Now select the **Pipe Install Vertical Copper End Feed Workbook**.

[18] Press **Select**.

[19] Following the previous steps if necessary for guidance, open up the **Pipe Install Vertical Copper End Feed Workbook** and allow for 6m of **22mm Copper Surface Mount** pipe then close the **Workbook** and mark it as complete.

[20] With the previous step complete, your **Job Summary Screen** should look like this.



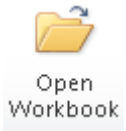
To finish off estimating the pipework for this job we need to make an allowance for fixings. We can do this in the **Plastic Pipe 15mm Fixings** and **Plastic Pipe 22mm Fixings Workbooks.** The **Plastic Pipe 15mm Fixings Workbook** is already in our estimate but the **Pipe 22mm Fixings Workbook** isn't. Let's bring it in.

[21] Press the **Add Workbook** button.

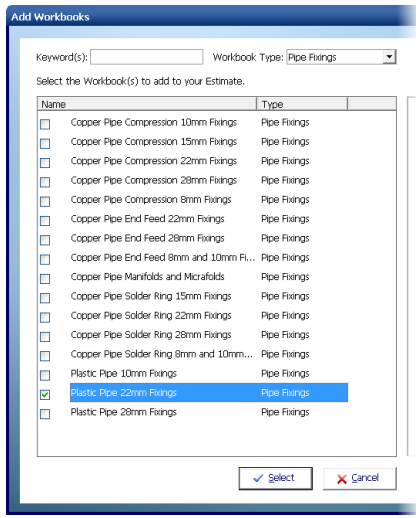
[22] Filter the **Workbook Type** dropdown to **Pipe Fixings.**

[23] Select **Plastic Pipe 22mm Fixings**.

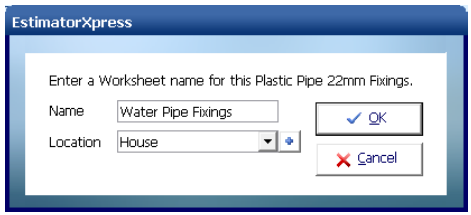
[24] Press the **Select** button.



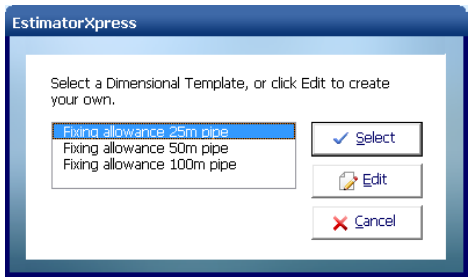
[25] Select the **Plastic Pipe 22mm Fixings Workbook** and press **Open Workbook.**

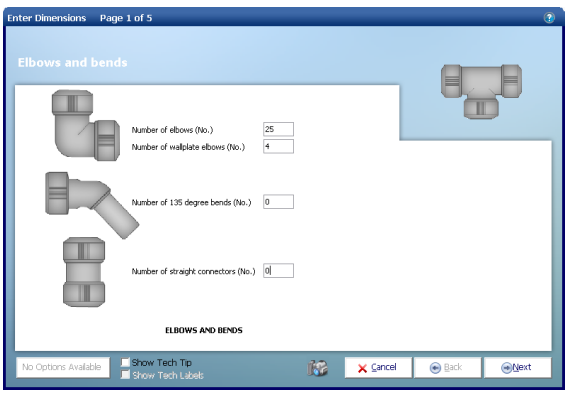


[26] A dialog box pops up inviting you to enter a name and location for the first **Worksheet** in the current **Workbook**. Enter a **Name** of *Water Pipe Fixings* and a **Location** of *House*.



[27] Next choose a dimensional template of *Fixing Allowance 25m Pipe* and press **Select**.



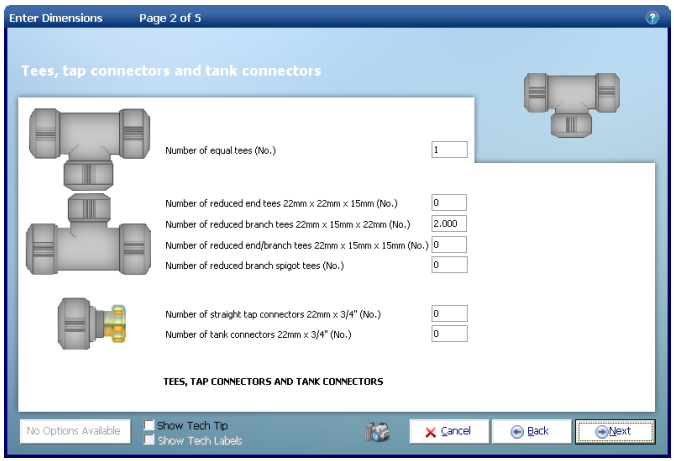


The **Dimensions Wizard** pops up.

[28] On page one, enter the **Number of elbows** as *25*.

[29] Review the other fixings on page one and set them as appropriate.

[30] Click **Next**.



[31] Set the **Number of equal tees** to *1*.

[32] Set the **Number of reduced branch tees 22mm x 15mm x 22mm** to *2*.

[33] Continue through the remaining pages of the wizard quantifying the different fixings to meet the requirements of the job.

[34] Once you have reached page 5, click **Finish** to close the **Dimensions Wizard**.

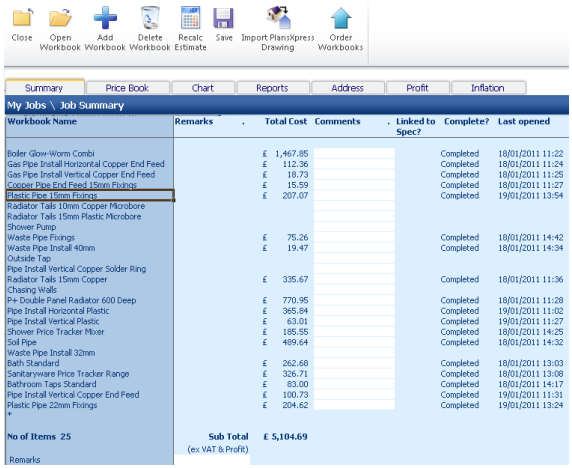
[35] Once you have reviewed the details of the resources you have allowed for, press the **Close** button to return to the **Summary of Plastic Pipe 22mm Fixings Workbook** .

[36] Now to return to the **Job Summary**, press the **Close** button. Answer **Yes** when asked if this **Workbook** is complete.

[37] Now follow the same process with the **Plastic Fixings 15mm Workbook** allowing the following, together with any other fixings that you would like to include in the estimate:

Description	Quantity
Number of elbows	40
Number of equal tees	8
Number of 135 degree bends	4

Once you have completed this **Workbook** your **Job Summary Screen** should look like this:



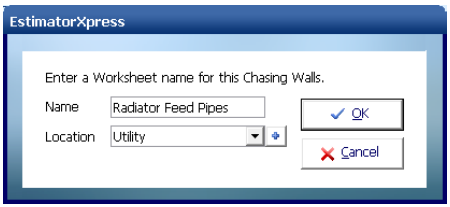
Workbook Name	Remarks	.	Total Cost	Comments	.	Linked to Spec?	Complete?	Last opened
Boiler Glow-Worm Combi			£ 1,467.85				Completed	18/01/2011 11:22
Gas Pipe Install Horizontal Copper End Feed			£ 112.36				Completed	18/01/2011 11:24
Gas Pipe Install Vertical Copper End Feed			£ 18.73				Completed	18/01/2011 11:25
Copper Pipe End Feed 15mm Fixings			£ 15.59				Completed	18/01/2011 11:27
Plastic Pipe 15mm Fixings			£ 207.07				Completed	19/01/2011 13:54
Radiator Tails 10mm Copper Microbore								
Radiator Tails 15mm Plastic Microbore								
Shower Pump								
Waste Pipe Fixings			£ 75.26				Completed	18/01/2011 14:42
Waste Pipe Install 40mm			£ 19.47				Completed	18/01/2011 14:34
Outside Tap								
Pipe Install Vertical Copper Solder Ring								
Radiator Tails 15mm Copper			£ 335.67				Completed	18/01/2011 11:36
Chasing Walls								
P+ Double Panel Radiator 600 Deep			£ 770.95				Completed	18/01/2011 11:28
Pipe Install Horizontal Plastic			£ 365.84				Completed	19/01/2011 11:02
Pipe Install Vertical Plastic			£ 63.01				Completed	19/01/2011 11:27
Shower Price Tracker Mixer			£ 185.55				Completed	18/01/2011 14:25
Soil Pipe			£ 489.64				Completed	18/01/2011 14:32
Waste Pipe Install 32mm								
Bath Standard			£ 262.68				Completed	18/01/2011 13:03
Sanitaryware Price Tracker Range			£ 326.71				Completed	18/01/2011 13:08
Bathroom Taps Standard			£ 83.00				Completed	18/01/2011 14:17
Pipe Install Vertical Copper End Feed			£ 100.73				Completed	19/01/2011 11:31
Plastic Pipe 22mm Fixings			£ 204.62				Completed	19/01/2011 13:24
*								
No of Items 25	Sub Total (ex VAT & Profit)		£ 5,104.69					
Remarks								

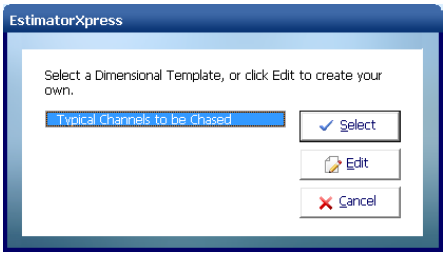
Finally we need to allow for chasing the pipes that drop down from the bathroom to the ground floor for the radiator flow and return.

[38] Select **Chasing Walls Workbook** and click **Open Workbook**.

[39] You are now transferred to the **Summary of Chasing Walls Workbook** and a dialog box will automatically pop up asking you to name and give a location for the walls being chased.

[40] Enter *Radiator Feed Pipes* as a **name** for this **Worksheet** and then select *Utility* for a **location**. Click **OK.**





[41] Select a dimensional template of **Typical Vertical Channel** and click **Select**.

The **Dimensions Wizard** automatically pops up.

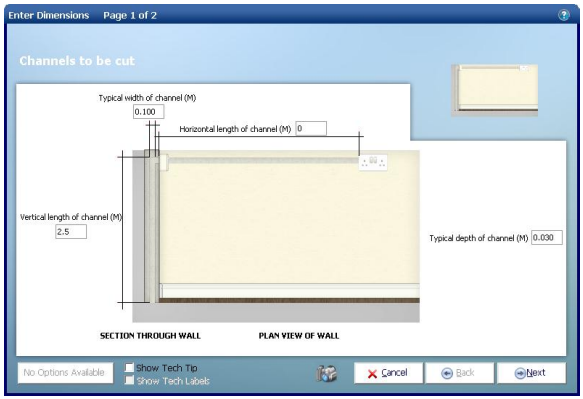
[42] On page 1 enter a **Vertical length of channel** of *2.5*.

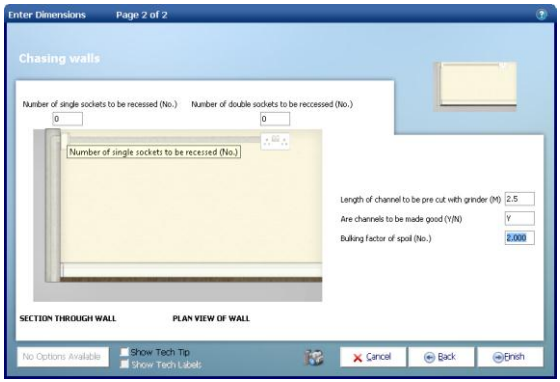
[43] Enter a **Typical width of channel** of *0.1*.

[44] Enter a **Typical depth of channel** of *0.03*.

[45] We do not require any horizontal channel so make sure that **Horizontal length of channel** is set to *0*.

[46] Click **Next**.





[47] We do not require any holes for electrical sockets to be cut so zero out these boxes. Set the **Length of channel to be pre cut with grinder** to *2.5*.

[48] Confirm that the channels are to be made good & that the bulking factor for spoil is 2.

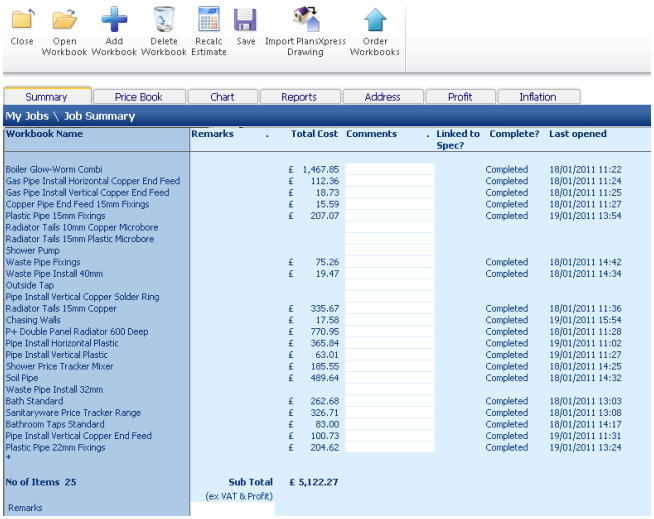
[49] Click **Finish**.

[50] Review the **Resources** section at the bottom of the page to check that you are happy with the material, labour and plant being used in this **Worksheet**. If you wish to change any resources you can use the **Resources Wizard**.

Resources	Units		Total Quantity	Description
Bonding coat plaster	M3	0.015	0.02	Bonding Plaster 25kg
Cut vertical channel	M	2.500	2.50	General Labourer
Cut horizontal channel	M	-	-	General Labourer
Cut edge to channel	M	2.500	2.50	General Labourer
Cut single socket recess	No.	-	-	General Labourer
Cut double socket recess	No.	-	-	General Labourer
Make good all channels	M	2.500	2.50	Plasterer
Clear debris	M3	0.015	0.02	General Labourer
Skip	M3	0.015	0.02	Skip 7m3 inc. Land Fill Tax
*				

[51] Close the **Radiator Feed Pipes Worksheet** with the **Close** button to return to **Summary of Chasing Walls Workbook**.

[52] Click the **Close** button from the **Summary of Chasing Walls Workbook**. A dialog box pops up asking if the **Workbook** is complete. Click **Yes**.



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

Well done! You've now completed your first estimate in **EstimatorXpress® Plumbing & Heating Trade edition**. We'll now move on to looking at the output of your estimate and scheduling of material orders, and work on site once you start the job.

If you wish to stop and close the current estimate:

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

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

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

BAR CHART PLANNER

10.00 Minutes

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

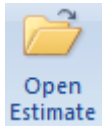
If you have joined this tutorial after having closed **EstimatorXpress®** follow the steps below:

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

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

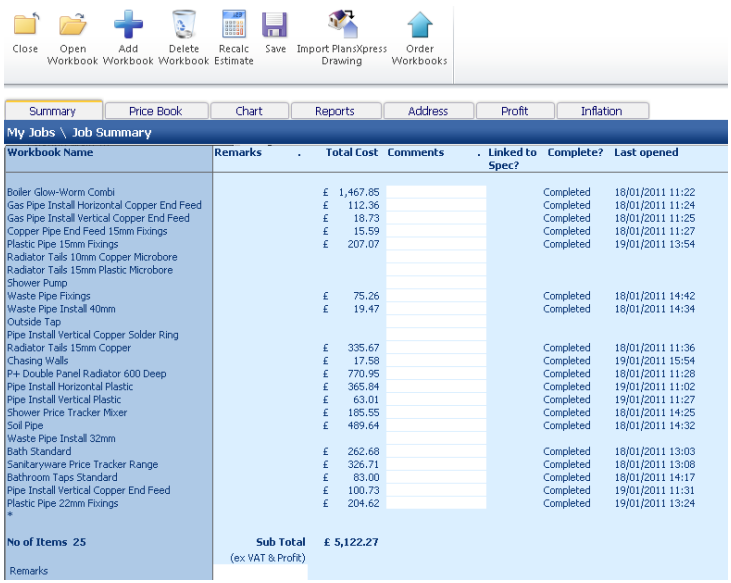
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.

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



You are now going to look at producing **Bar Charts** with **EstimatorXpress®** to help with the planning of your **Job**. In this example, you will schedule the activities involved in installing our heating system & new bathroom.

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



[1]

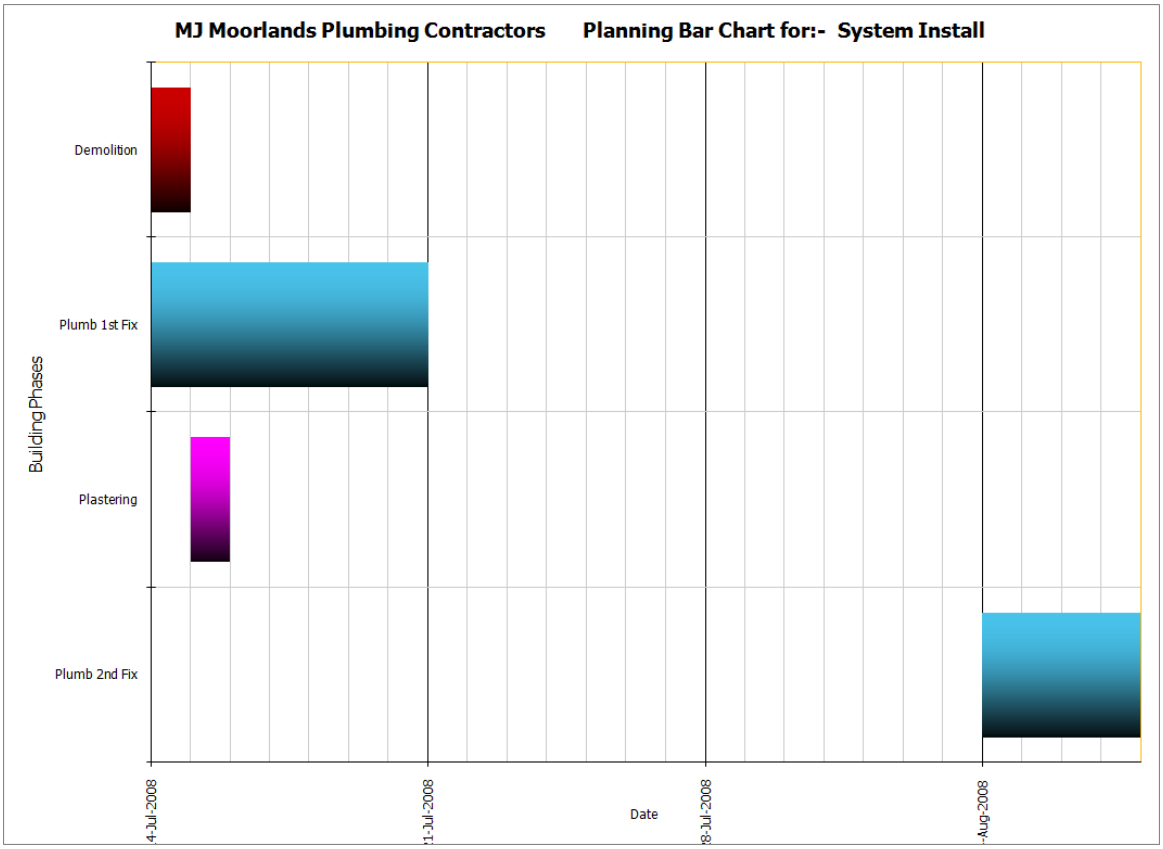
To begin, double click on the **Chart** tab near the top of the screen. This will transfer you to **the Bar Chart Planner** inside your **Job**.

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

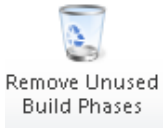
TIP: **EstimatorXpress®** automatically loads the **Bar Chart** for a **Large Extension** as this is what you selected when you created the **Job**. It is a template **Bar Chart** with suggested durations for this type/size of build. If you decide at any point that this chart is unsuitable for the **Job**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

[2] You will now see on screen a full **Bar Chart** for an 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 an extension. Notice that the start date is the start date you entered when you created your **Job**.

Clearly there is an awful lot of work being included in this bar chart that we are not concerned with. We only start with a full extension bar chart so that you can provide your customer with a view of when the plumbing tasks are carried out in relation to a complete build if you so wish. We will cut out all of the extra phases in our example to just leave the phases that we are interested in.

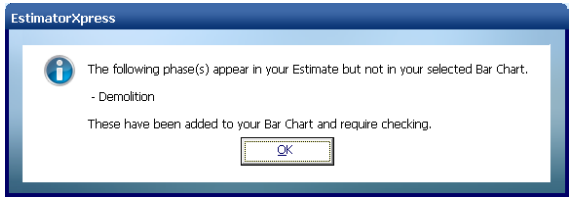


NOTE: The **Chart** shown above is an example of what a completed **Bar Chart** might look like. It may not be identical to the **Chart** you see on screen.



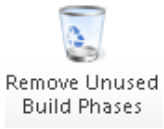
TIP: If the **Chart** contains **Build Phases** which are not relevant to this **Job**, you can use the **Remove Unused Build Phases** button to delete them from the chart. You will need to close the **Edit Bar Chart** tool before you so this (see next).

[3] A box pops up telling you that a build phase, **Demolition**, has been used in our estimate but isn't currently in our chart. It will be placed at the start of our chart with a duration of one week. We will need to move this and adjust its length in a minute. Press **OK**.

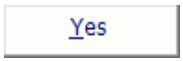


[4] We could leave all of the build phases in our plan to show our customer how the plumbing work relates to the entire build but in this case lets only show the build phases that relate to our estimate.

[5] Press **Close** to close the **Edit Bar Chart** tool.



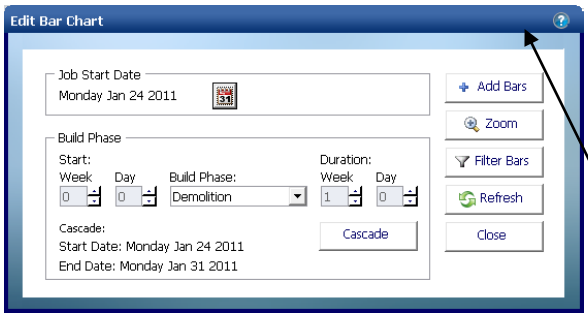
[6] Press the **Remove Unused Build Phases** button to delete all unused build phases them from the chart.



[7] A dialog box pops up listing all the unused build phases and asking if you wish to remove them.

Click **Yes**.

[8] Click the **Edit Bar Chart** button to launch the **Edit Bar Chart** dialog box.



The **Edit Bar Chart** tool 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 **Edit Bar Chart** button.

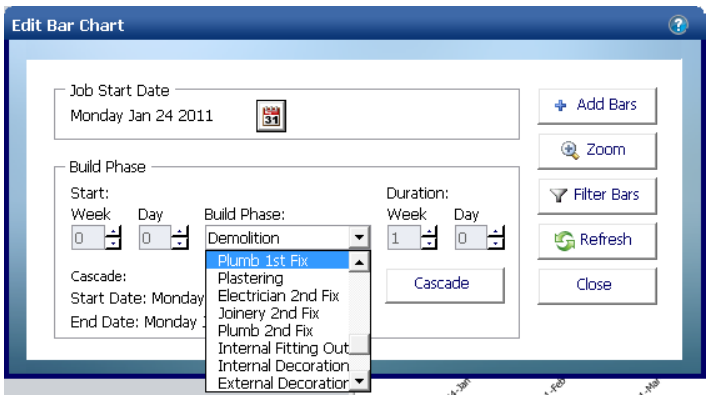
TIP: If the dialog box obstructs your view of the **Bar Chart** simply click on the bar at the top of the dialog box and with the left mouse button held down; drag the box to one side. When it is in a good position release the mouse button.

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

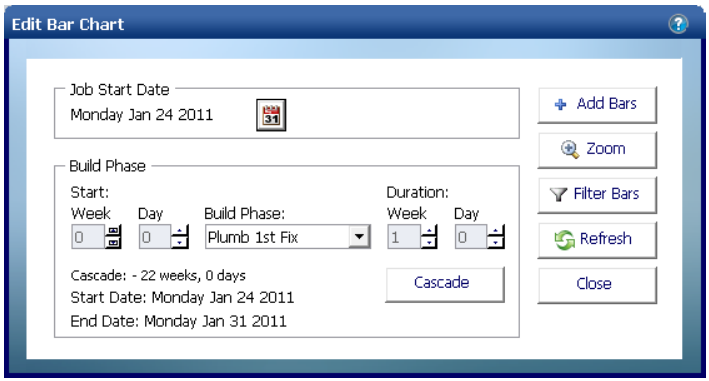
(With some PCs, Excel automatically hides some of the labels for clarity. Normally however these missing labels will be printed, depending on your printer resolution. To check any individual bar description or duration, mouse-over the bar, **EstimatorXpress®** will then show the name and duration of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

[9] To change the start date of the **Plumb 1st Fix** build phase**,** select it from the drop down box in the centre of the dialog box.

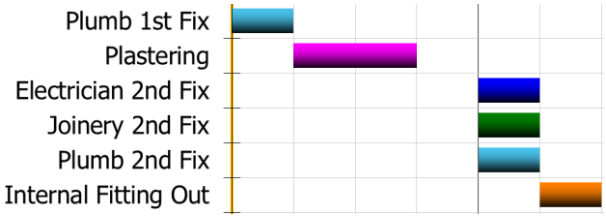
Currently the start date for **Plumb 1st Fix** is set at week 21 to allow for the phases you have excluded to be completed first.



[10] To move this phase to week 0 (the start of the job) for example, click on the Down Arrow of the Start Week in the dialog box until the week is at 0.



[11] You will see on the **Bar Chart** on screen that the **Plumb 1st Fix Phase** has been moved to week 0.



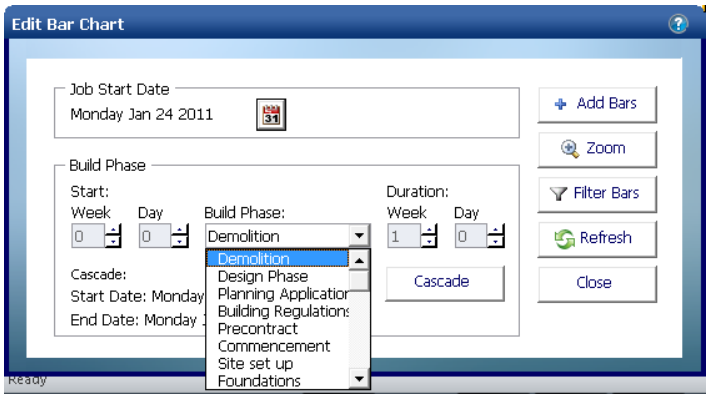
[12] To move all the **Build Phases** after **Plumb 1st Fix** forward by the same duration, press **Cascade** button.

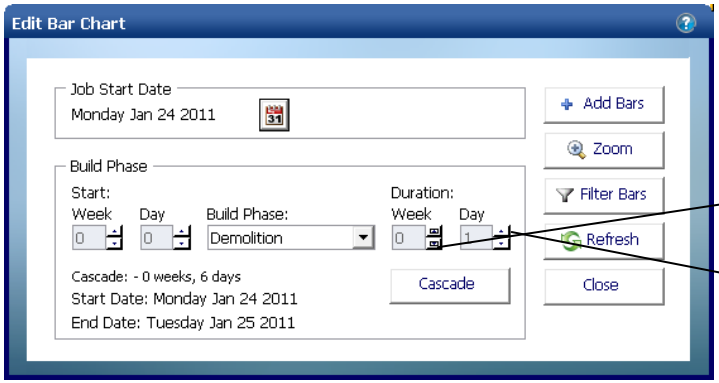
You will see that all the **Build Phases** following **Plumb 1st Fix** have been brought forward by the same number of weeks.

[13] Press the **Refresh** button to re-space the bar chart across the page.

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

Select **Demolition** from the **Build Phase** dropdown.



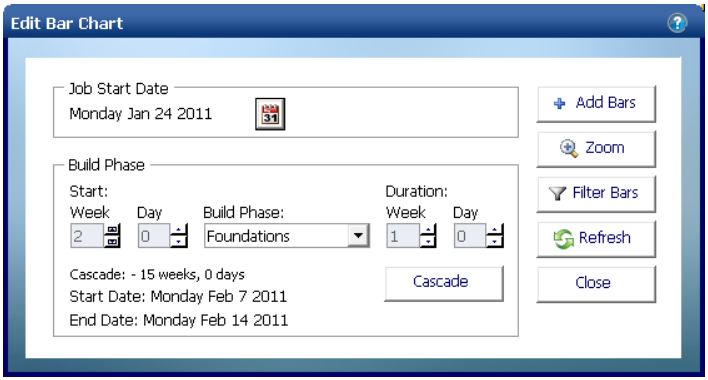


[15] Currently the duration for **Demolition** is set at one week. This build phase is only concerned with the chasing in of pipes required, so we only need allow for 1 day doing this.

To decrease its duration to one day, click on the Down Arrow of the Week duration in the dialog box to set it to 0. Then click on the Up Arrow of the Day duration in the dialog box to set it to 1.

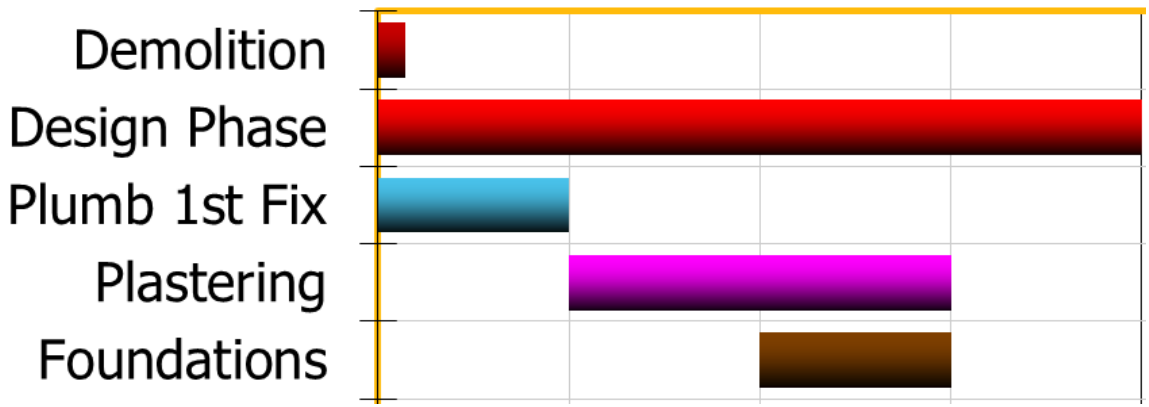
[16] You will see on the **Bar Chart** on-screen that the length of the **Demolition** build phase has decreased to 1 day.

[17] Continue to edit the bar chart using these techniques until you are happy with the plan of your work.



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

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



[20] To print the chart, press the **Print** button on the top toolbar.

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

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

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

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

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

REPORT MANAGER

10.00 Minutes

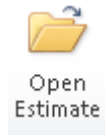
You are now going to look at producing **Reports** with the **EstimatorXpress® Report Manager** to help with the quoting, planning and management of your **Job**.

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

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

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

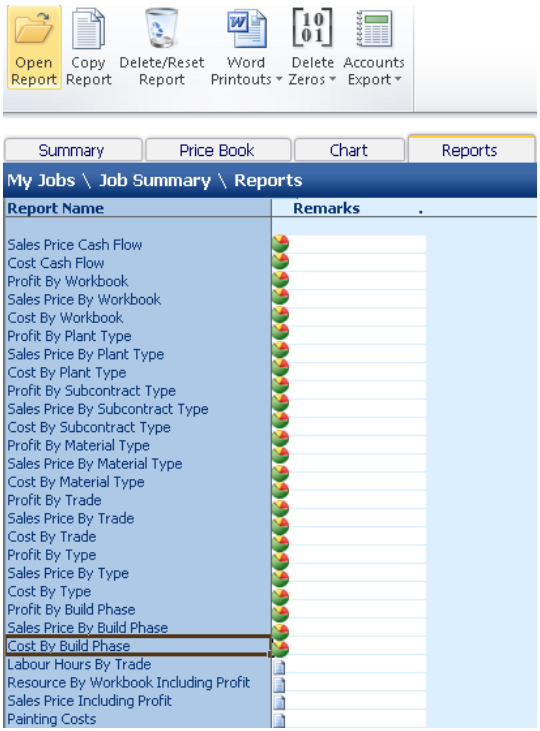
1. Press the **My Estimates** button at the top of the **Main Menu** screen.
2. This will transfer you to **My Jobs**. Click on the **Job** called Mr Phillips or whatever name you chose when you created it.



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

[1] 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 heating system & bathroom installation.

To begin, double click on the **Reports** tab near the top of the **Job Summary** screen to open the **Report Manager** screen.



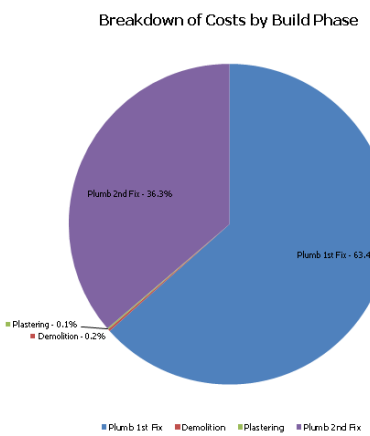
You are transferred to the **Reports Manager**.

[2] On the left of the screen, you will see all of the Reports that are automatically created for your estimate.

[3] Select the Chart Report called **Cost by Build Phase.**

[4] Click **Open Report** button.

[5] The **Chart Report** called **Costs by Build Phase** opens showing the breakdowns as a percentage of the total cost of the **Job**.



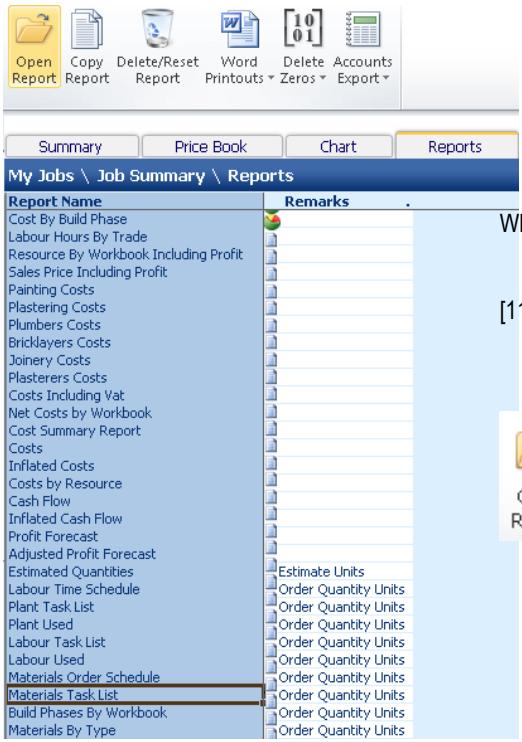
[6] To see this information in monetary terms, click the **Toggle** button on the toolbar.

[7] The **Chart Report** will now display the breakdown in pounds excluding VAT, profit and inflation.

[8] To print this **Report,** click the **Print** button on the toolbar.

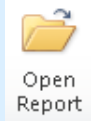
[9] Click the **Close** button to return to the **Report Manager** screen.

[10] Have a look at any of the other **Chart Reports** available before moving on to the next step.



When you are ready, take a look at the tabular **Reports:**

[11] Scroll down the screen to find the **Materials Task List Repor**t.



[12] Click on the Report and press **Open Report** button.

[13] You will now see all a list of all the materials required to carry out the job that you have estimated alongside the quantity needed inclusive of wastage, cost and their **Order by Date**.

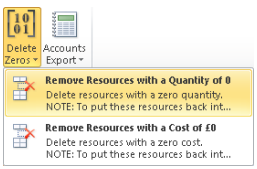
Order By	Date Required	Description	Purch Cost (£)	Purchase Units	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13/12/2010	24/01/2011	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80)	£80.00	M3	0.05	0.00	0.05	£4.00	£0.30	£4.30
		Wood Screws Steel CSK Twin Thread 8 x 1.5 inch (200 box)	£6.70	BX	0.08	0.01	0.09	£0.55	£0.04	£0.59
10/01/2011	24/01/2011	Waste Pipe 40mm x 3M	£6.20	EA	1.33	0.10	1.43	£8.27	£0.62	£8.89
		Glow-Worm Standard Flue Kit	£89.00	EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Glow-Worm Flexicom 30cx Combi Boiler	£1,109.00	EA	1.00	0.08	1.08	£1,109.00	£83.18	£1,192.18
		Copper End Feed Straight Coupler 15mm	£0.20	EA	3.50	0.26	3.76	£0.70	£0.05	£0.75
		Copper End Feed Street Elbow 15mm	£0.60	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Full Cross Over 15mm	£6.00	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Obtuse Elbow 15mm	£0.80	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Elbow 15mm	£0.30	EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Male Elbow 15mm x 1/2 inch	£6.00	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Female Elbow 15mm x 1/2 inch	£4.90	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Male Straight Connector 15mm x 1/4 inch	£4.70	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Bent Tap Connector 15mm x 1/2 inch	£2.20	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Straight Tap Connector 15mm x 3/4 inch	£5.50	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Imperial/Metric Adaptor 15mm x 1/2 inch	£3.20	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Part Cross Over 15mm	£5.30	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Slip Coupler 15mm	£1.50	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Stop End with Air Vent 15mm	£3.60	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Stop End 15mm	£1.40	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Female straight Connector 15mm x 1/2 inch	£2.90	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Male Straight Connector 15mm x 1/2 inch	£2.90	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Reduced Coupler 15mm x 8mm	£1.90	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Reduced Coupler 15mm x 10mm	£0.90	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Equal Tee 15mm	£0.60	EA	1.00	0.08	1.08	£0.60	£0.05	£0.65
		Copper End Feed Straight Tap Connector 15mm x 1/2 inch	£1.40	EA	0.00	0.00	0.00	£0.00	£0.00	£0.00

NOTE: To see all data either scroll using the 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.

NOTE: You may have noticed that there are various resources that appear in the reports i.e. **Copper End Feed Female Elbow 15mm x ½ inch**, with a quantity of 0. They are appearing in your reports because we had various **Worksheets** that use the products but we have set the quantity required to 0 (we set **Copper End Feed Female Elbow 15mm x ½ inch** to

have a quantity of 0 in the **Copper Pipe End Feed 15mm Fixings Workbook**). To remove these items from appearing in our reports use the 2 options in the **Delete Zeros** dropdown from the **Reports Manager** screen.

[14] Press the **Close** button to return to the **Library of Reports screen** to return to the **Reports Manager** screen.



[15] From the **Delete Zeros** dropdown select **Remove Resources with a Quantity of 0**.

[16] Click on the Report called **Material Task List** and press the **Open Report** button.

[17] You will now see that all resources with a quantity of 0 have been removed from your reports.

Order By	Date Required	Description	Purch Cost (£)	Purchase Units	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13/12/2010	24/01/2011	R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80)	£80.00	M3	0.05	0.00	0.05	£4.00	£0.30	£4.30
		Wood Screws Steel CSK Twin Thread 8 x 1.5 inch (200 box)	£6.70	BX	0.08	0.01	0.09	£0.55	£0.04	£0.59
10/01/2011	24/01/2011	Waste Pipe 40mm x 3M	£6.20	EA	1.33	0.10	1.43	£8.27	£0.62	£8.89
		Glow-Worm Standard Flue Kit	£89.00	EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Glow-Worm Flexicom 30cx Combi Boiler	£1,109.00	EA	1.00	0.08	1.08	£1,109.00	£83.18	£1,192.18
		Copper End Feed Straight Coupler 15mm	£0.20	EA	3.50	0.26	3.76	£0.70	£0.05	£0.75
		Copper End Feed Elbow 15mm	£0.30	EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Equal Tee 15mm	£0.60	EA	1.00	0.08	1.08	£0.60	£0.05	£0.65
		Copper Tube EN1057 15mm x 3M	£5.40	M	17.50	1.31	18.81	£94.50	£7.09	£101.59
		Red Wall Plugs (100 Box)	£2.20	EA	0.17	0.01	0.18	£0.36	£0.03	£0.39
		Clip Over Pipe Clip 15mm	£0.20	EA	10.50	0.79	11.29	£2.10	£0.16	£2.26
		Plastic Pipe 15mm x 25M	£29.00	EA	2.92	0.22	3.14	£84.68	£6.35	£91.03
		Plastic Pipe Conduit 15mm x 25M	£21.00	EA	1.40	0.11	1.51	£29.40	£2.21	£31.61
		Plastic Straight Connector 15mm	£1.50	EA	1.52	0.11	1.63	£2.28	£0.17	£2.45
		Plastic Pipe Clip Screw 15mm	£9.00	PK	2.53	0.19	2.72	£22.80	£1.71	£24.51
		Plastic Pipe 22mm x 25M	£56.00	EA	0.88	0.07	0.95	£49.28	£3.70	£52.98
		Plastic Pipe Conduit 22mm x 25M	£26.00	EA	0.46	0.03	0.49	£11.96	£0.90	£12.86
		Plastic Pipe Clip Screw 22mm	£9.00	PK	0.70	0.05	0.75	£6.30	£0.47	£6.77
		Plastic Straight Connector 22mm	£2.00	EA	0.42	0.03	0.45	£0.84	£0.06	£0.90
		Clip Over Pipe Clip 22mm	£0.50	EA	6.00	0.45	6.45	£3.00	£0.23	£3.23
		Copper Tube EN1057 22mm x 3M	£11.00	M	6.00	0.45	6.45	£66.00	£4.95	£70.95
		Copper End Feed Straight Coupler 22mm	£0.40	EA	2.00	0.15	2.15	£0.80	£0.06	£0.86
		Plastic Microbore Nail 22mm	£18.00	HD	0.04	0.00	0.04	£0.72	£0.05	£0.77
		Plastic Equal Tee 15mm	£2.50	EA	8.00	0.60	8.60	£20.00	£1.50	£21.50
		Plastic Elbow 15mm	£1.80	EA	40.00	3.00	43.00	£72.00	£5.40	£77.40
		Plastic Bend 135deg 15mm	£1.90	EA	4.00	0.30	4.30	£7.60	£0.57	£8.17

[18] If you make changes to the **Report** and you want to restore this data to being sorted by order date, click anywhere in the column labelled **Order By** and press the **Sort by Date Order** button on the top tool bar.

For more information about changing the appearance of Reports press the Help button or press the F1 Key on your keyboard.

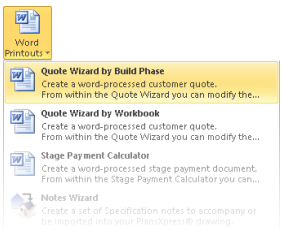
[19] When finished press the **Close** button to return to the **Reports Manager** screen.

Finally, you can now print out a **Customer Quotation** in Microsoft® Word with the **EstimatorXpress® Report Manager Quote Wizard.**

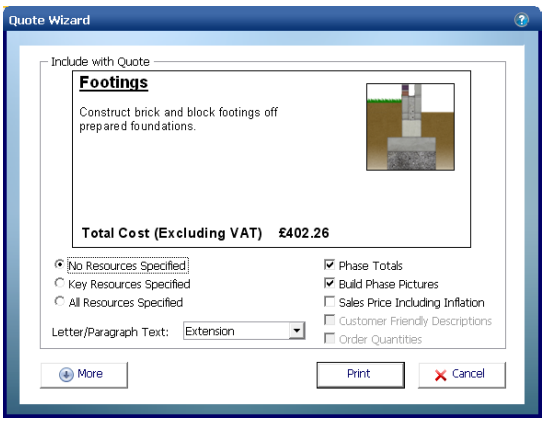
PRINTING OUT A CUSTOMER QUOTATION IN MICROSOFT® WORD

15.00 Minutes

NOTE: You must have Microsoft® Word installed on your PC, for this feature to function.



[1] From the **Reports** tab, click **Word Prinouts** then **Quote Wizard by Build Phase**.



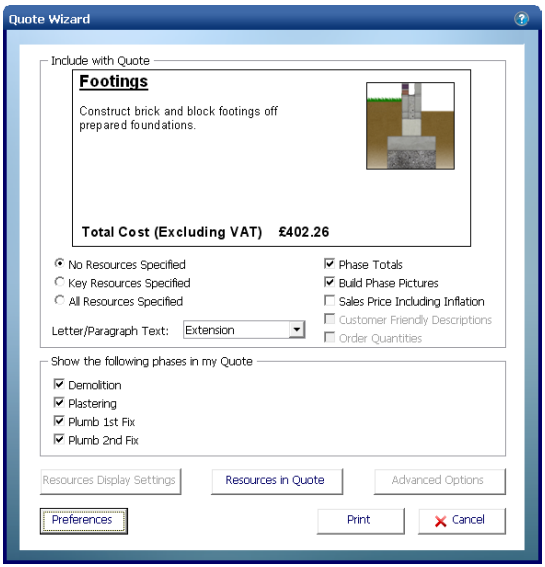
The **Quote Wizard** dialog pops up.

[2] You can choose what level of information you wish to include in your **Quote** by checking any of the following options:

No Resources Specified
Key Resources Specified
All Resources Specified
Phase Totals
Build Phase Pictures
Sales Price inc. Inflation

If you select **Key Resources** or **All Resources Specified** you can then also choose whether you wish the following items to be included in your **Quote:**

Customer Friendly Descriptions
Order Quantities



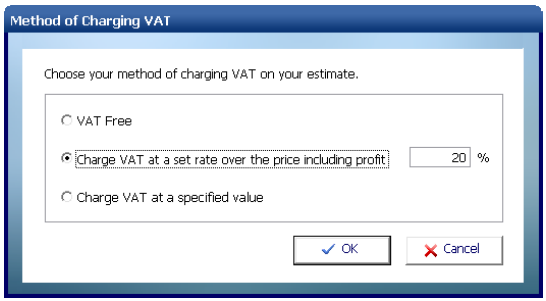
[3] As you check and uncheck the various options, the sample text relating to **Footings** displayed in the dialog box will change to give you an idea of how the text might look in your finished **Quote.**

[4] 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.

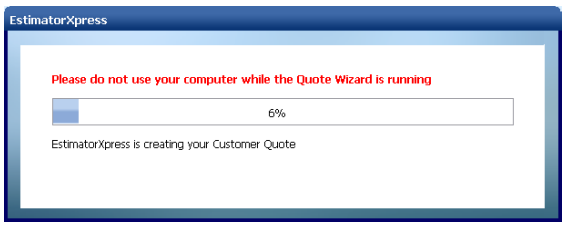
NOTE: The **Advanced Options** button allows you to change which materials are explicitly mentioned in the quote for each individual **Build Phase** e.g. you may wish to exclude **concrete** from the phase **Plumb 1st Fix** build phase but you would want to include the **Boilers Gas** type**.**

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

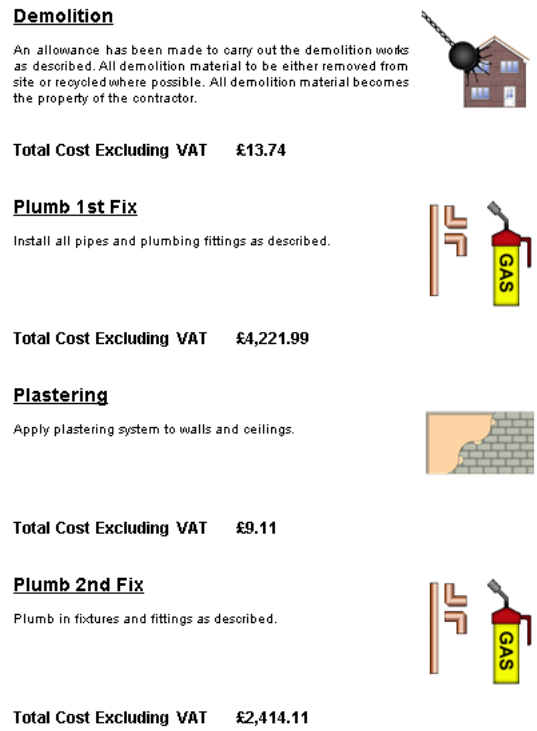
[5] Click **Print** to generate your **Quote** in Microsoft Word.



[6] 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.



[7] Microsoft® Word will automatically open and load your **Customer Quotation** which you can now edit, save and print as you would any other Word document.

NOTE: **Quotes** are stored in the folder containing your estimate files. This will be in a different location depending on the version of windows that you are running. You can use the **Previous Quotes** button from the **Library of Reports screen** to open a quote that you previously produced.

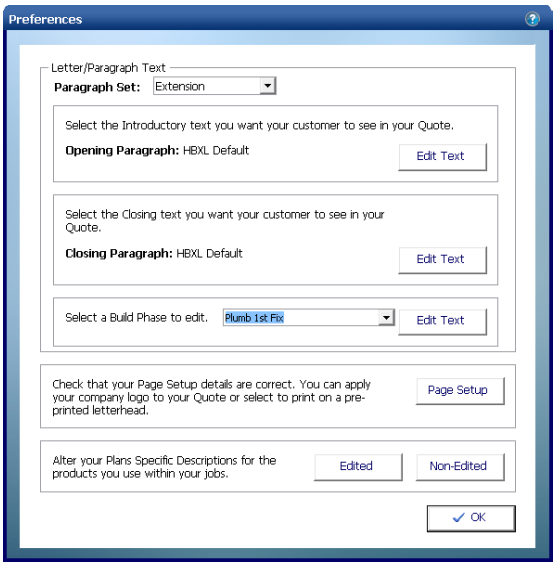
[8] Click on **EstimatorXpress®** in your Windows® taskbar to return to the software.

[9] To return to the **Job Summary** screen, double click on the **Summary** tab.

You are returned to the **Job Summary** screen.

TIP: In future, you may also want to review some of the **Preferences** for your printed quotation.

[10] From the **Quote Wizard** dialog box, press the **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 Paragraphs

Plus you can use the **Page Setup** button to tell **EstimatorXpress®** that you want to use your own headed paper or to import your company logo.

You may also want to review **Resource Descriptions.** For example you may not want the ball valve to appear in the **Customer Quotation** as "Chrome isolating Ball Valve Copper x Copper 22mm" so you can tell the software to simply substitute **Isolating Ball Valve**.

To view product descriptions that may required editing and to give them your choice of name, click the **Non-edited** button.

A dialog box containing 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 the **Close** button on the top left of the **Job Summary** screen.

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

3. You are now in the **Main Menu** Screen. To close **EstimatorXpress®** press the **Exit** button at the top right of the 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 to provide more details of each screen or ring **HBXL Technical Support** on 0845 1234 085.

GLOSSARY

Accounts Export
Use this button to export data to QuickBooks® and CIA® 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: Plumb 1st Fix, Plumb 2nd Fix and Demolition. 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 for the 2nd fix, by applying the "Plumb 2nd Fix" filter in the Report Manager. You define the start dates of each Build Phase in the Bar Chart.

Button Bar (With Reports)
These are horizontal grey bars, which appear in opened Reports and allow you to modify the Report by dragging the bar to different parts of the screen.

Cell
The Screen is divided into a number of rectangular areas called "cells". Coloured cells are "Locked" and cannot be edited. White cells are can be edited by moving the cursor into the cell and editing.

Code
This is the manufacturer's code for the described Resource.

Completed (Within Job Summary)
Defines whether you regard the estimating in a **Workbook** as having been completed. (Each time you close a **Workbook** you are asked whether the **Workbook** has been completed, and the **Job Summary** marked accordingly).

Composite Items Estimator
See **Workbook** (Composite)

Copy
This is the function, which allows you to create a duplicate of an existing item having selected it with your mouse, for example, a **Price Book**, **Worksheet** or **Column**.

Critical
Critical indicates an item, which you consider to be critical and worthy of close attention during estimating. For example, the cost of nails may not be particularly important but the cost of bricks will probably be regarded as critical.

Cursor
The small marker on the screen (often in the shape of a white arrow or white cross) that follows the movement of the mouse and indicates which area of the screen will be affected when you press the mouse button. The cursor changes shape during certain tasks.

Desktop
This is the main area of Windows where you can open and manage files. When **EstimatorXpress®** is properly installed, a **EstimatorXpress®** icon should appear on your desktop.

Dialog Box
A Dialog Box is a box of information, which "pops up" when various commands have been initiated by you using the various buttons on the Screen. Normally your will be expected to enter information or use the select arrow to choose information in the pull down box on the Dialog Box. Once the information has been entered or selected, press the OK or Cancel button to clear the Dialog Box. While the Dialog Box is on the Screen, no other button pressing or editing can occur.

Dimensions Section
This is the section of a **Worksheet** where you may add the dimensions of your building works. Once you have opened a **Worksheet**, within a **Workbook** you will be in the dimensions section unless you have opened a composite **Workbook** that doesn't have a dimensions section.

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 heating system/renovation job/new build install/bathroom refit…

Estimate Rate
Estimate Rate is the cost per usage unit. For example, pipe is laid at £1 per m. (£1 is the Estimate rate). The Estimate rate is obtained by Multiplying the Production/Usage Factor x Purchase Cost.

Export
Exporting allows the user to transfer any screen information into a new standard Microsoft Excel file, which can then be opened in Microsoft® Excel. All information is transferred in value or text form without any underlying formulas. All exported sheets are stored in the C:\Program Files\HBXL\EstimatorXpress\Exports folder where C:\Program Files\HBXL\EstimatorXpress is the location where **EstimatorXpress**® was installed.

Icon
This is a small picture, which represents something that you can manipulate, such as a folder or a document. When **EstimatorXpress®** is properly installed, a **EstimatorXpress®** icon should appear on your desktop.

Item Used For
Item Used For describes the usage of a Resource. E.g. **Plastic Pipe Clip Screw 15mm** are used to *Secure Pipe*.

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 bathroom fit-out **Group Of Workbooks** could include…

Showerbath **Workbook**, Sanitaryware Price Tracker Range **Workbook**, Ceramic Wall Tiling **Workbook**, Waste Pipe Install 32mm **Workbook**, Towel Rail Straight **Workbook**, Bathroom Taps Standard **Workbook**, Pipe Install Vertical Copper End Feed **Workbook**, Pipe Install Horizontal End Feed **Workbook**, Plumbing Consumables **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: Kitchen, Bathroom etc. **EstimatorXpress®** uses locations references for sorting Reports. For example if you had estimated a system install, it would be possible to create a Report, which "picks out" only those **Worksheet**s and associated resources, which relate to the Bathroom.

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 Underfloor Heating in Screed **Worksheet** would include Pipe, System Plates, a Manifold, Actuators & a Plumber to install the system.

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.

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 in your estimate that are not specifically related to the dimensions input into an estimate **Workbook**.

Sundry Items Area
The area in which you add sundry items to your estimate in a **Workbook**. The items are always unrelated to any automatic calculations carried out by **EstimatorXpress®**.

Suppliers
The organisation/ persons who provide you with your materials/plant/labour/subcontract.

Toolbar
A series of shortcut buttons that provide quick access to commands. Usually situated at the top and bottom of the screen.

Tool Tip
This is a Help feature that displays the function of a button when you move your cursor over a button.

Total Cost (Job Summary)
This is the estimated finished cost of a particular **Workbook** (Excluding Profit).

Total Order Quantity
This is the total order required, expressed in purchase units, as distinct from usage units.

Type
Type is a category, which is defined to enable you to sort similar items into groups. You may use the predefined types or create your own using the button on the **Main Menu**. (Opportunities to create new types and other sort references also occur in many Dialog Boxes). For example, the Type “Copper Fittings” includes all the different types of copper with various connection methods.

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 **Workbook** and taking into account that it may well affect other **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 Plumber is paid £30.00 per hour and the Estimate Rate for laying pipe is £0.80 per m, then the usage factor would be 0.04. Thus Cost for laying pipe is £30.00 * 0.04 = £0.80.

Usage Factor Calculator
When you are editing resources in a **Worksheet**, the **Usage Factor Calculator** can help you work out the correct **Usage Factor** to input.

Usage Units
These are the units that you actually use a resource in. For example, paint will be purchased in "purchase units" of 5 litre tins, but will be used to paint areas in m^2, which is the "usage unit".

Variations
If you are using Total Toolkit edition, it is possible to create and save **Variations** to previously created **Customer Quotes.**

VAT Codes
VAT % is the rate of VAT defined by you when the Resource was created or modified by the user in **Price Book**.

Wastage Cost
This is the cost of the Wastage based on the Wastage Factor defined in the **Price Book**.

Wastage Factor
This is the wastage allowance (percentage) on each Resource that is defined in the **Price Book** when each Resource is created or edited.

Workbook
Within each Estimate, you must select the elements of work or **Workbooks** that you need to estimate. For example, there will be a **Workbook** for Copper Pipe, Plastic Pipe, P+ Radiators… 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 standard **Workbooks**. 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 with a Dimension/Quantity Entry Area
The **Workbooks with a dimension/quantity entry section** are linked to a range of calculators provided within **EstimatorXpress® Plumbing & Heating Trade edition**, and provide a variety of complex calculations for items such as underfloor heating.

The other **Workbooks** in this category consist of a list of similar items that require quantifying individually i.e. a **Plastic Pipe 22mm Fixings Workbook** has 18 different fixings of that size that you can quantify as required.

Workbook (Composite)
Composite item **Workbooks** such as Bathrooms, Kitchens and Staircases are simply a list of resources that go to make up that element of the build and are not dependant on you inputting dimensions.
For example, a Bathroom **Workbook** could contain several **Worksheets**... one for each bathroom in a house. Each **Worksheet** could contains the various fittings required for each bathroom

Worksheet
Each **Workbook** can contain several **Worksheets**. For example, you may wish to estimate two different types of cavity walls in one **Job** such as front cavity wall in stone and rear cavity wall in brick. You would then need a separate **Worksheet** for the Rear **Brick** Walls and a separate sheet for the Front **Stone** Faced Walls in a house reflecting the different materials used in the walls. Both of these **Worksheets** will be estimated with the Cavity Wall **Workbook**.

Zoom
EstimatorXpress® allows you to predefine the amount of information viewable at any time by modifying the Zoom setting. The Zoom may be modified permanently by using the Zoom option in the View Menu on the Menu Bar.

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