EstimatorXpress®
PowerPack Tutorials

Software by
Adrian Wild, Steven Mulgrew & James Pizzey

Tutorial Written by
Olivia Wild & John Rees
House Builder *XL* Limited

Contents

HOW TO USE THIS TUTORIAL AND GET STARTED

What can PowerPack do?

PowerPack for **EstimatorXpress®** gives you the ability to create your own **Workbooks** from scratch. If you don't have **PowerPack**, call the **HBXL Sales Team** on **0845 1234 065** for more details. If you decide to purchase **PowerPack** for **EstimatorXpress®**, the **Support Team** will be able to instantly activate the **PowerPack** in your copy of **EstimatorXpress®**.

To obtain maximum benefit from **PowerPack**, we recommend that you work through the **Tutorials** in this guide before attempting to create your own **Workbook** from scratch.

PowerPack Tutorials

This guide contains two **Tutorials** which will lead you through creating a **Laminate Flooring Workbook** and a **Room Decoration Workbook**. Each **Tutorial** takes you through the entire process of creating a **Workbook**, and will take between 40 minutes and an hour to complete. On completion of the **Tutorials**, you will have a good understanding of the principles behind creating new **Workbooks** using **PowerPack**. Your knowledge will then allow super fast estimating of any task in the future.

Each **Tutorial** is divided into three stages:

[1] **Adding Resources to the Price Book** which involves ensuring all the necessary components, such as material & labour resources, are in the **Master Price Book** ready for use in your new workbooks.

[2] **Creating the Workbook.** This involves forming the structure of the **Workbook** by adding dimension & input options & calculations which do the behind the scenes estimating.

[3] **Specifying Resources in the Workbook.** This involves selecting the materials & labour from the **Price Book** to use as default resources in the **Workbook**.

[4] **Creating the Dimensions Wizard.** This involves placing the dimensional inputs over a number of pages and importing images to make a nice user interface for users of the **Workbook**. This can then be used as a visual aid to entering the dimensions for use in the **Workbook**. This feature is only available for users of **PowerPack Advanced**.

[5] **Creating the Resources Wizard.** This involves placing resource over a number of pages and importing images to make a nice user interface for users of the **Workbook**. This can then be used as a visual aid to specifying the correct resources for use in the **Workbook**. This feature is only available for users of **PowerPack Advanced**.

Additional Help

Support for **PowerPack** is available from the **HBXL Tech Team** on **0845 1234 085**. Please note support is only available with a valid **Support & Updates** subscription. For more information, call the **Tech Team** on **0845 1234 085**.

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

CREATING A LAMINATE FLOORING WORKBOOK

ADDING RESOURCES TO THE PRICE BOOK

10.00 Minutes

This exercise will lead you through manually adding some specialist laminate floor resources to the **Master Price Book**. Before starting to create your **Workbook** it's a good idea to ensure you have all the necessary material, labour and plant resources in your **Price Book** as this will get you thinking about which input options and calculations are required to create the **Workbook**. For the **Laminate Flooring Workbook** we will start by adding laminate flooring, underlay, self-levelling compound, cloaking strip and a specialist floor fitter to the **Master Price Book**.

[1] Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

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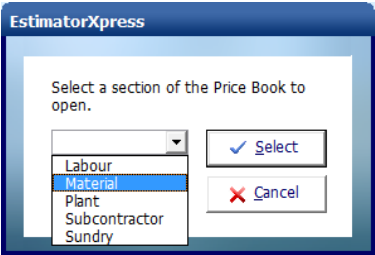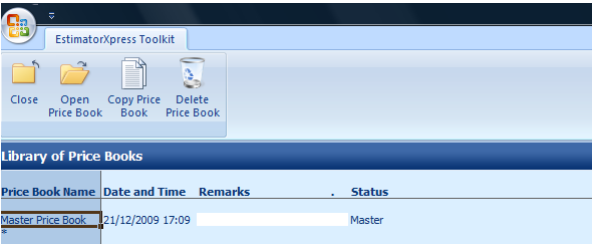
[3] From the **Main Menu,** click on **My Settings.**

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

[5]   Click on the **Master Price Book** with your mouse and then press **Open Price Book** button.

A dialog box pops up asking you which section of the **Price Book** you wish to open. We will start by adding the **Material** resources to the **Price Book**, so we need to open the **Material Section** of the **Price Book**.

[6]   Select **Material**.

[7]   Click **Select**.

NOTE: Usually when adding a resource to the **Price Book**, it is helpful to find a resource of the same **Type** to base your new resource on, as it is likely to have similar properties. Because we are creating a new **Type** of resource for our flooring materials, it doesn't matter which resource we base our new resource on.
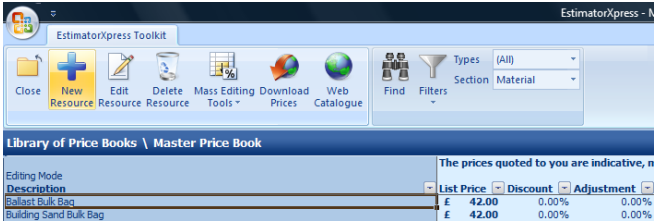
[8]   Select the resource at the top of the screen with your mouse and press **New Resource** button.

[9]   Delete the text in the **Description** input box and enter a new **Description** of **Beech Effect Small Board Laminate Flooring 1.75m2**.

[10] Enter a **Unit Cost** of **25.00**.

Because the laminate flooring is supplied in packs of 1.75m², we need to add a new **Unit of Purchase** called Pack.

[11] Press the blue add button adjacent to the **Units of Purchase** drop down box.

[12] Enter **Pack** in the input box.

[13] Click **OK**.

You are returned to the **New Resource** dialog box where **Pack** has been added to the **Units of Purchase** drop down box.

[14] **Pack** should now be selected in the **Units of Purchase** drop down box.

[15] Select **Provisional** from the **Supplier/ Contractor** drop down box.

We now need to add a new **Type** called **+ Flooring**, because there isn't an existing **Type** for flooring materials. We will assign all of the specialist flooring materials to this **Type**.

The **References** dialog box pops up.

[16] Enter **Laminate Flooring** into the input box.

[17] Click **OK**.

You are returned to the **New Resource** dialog box, where **Flooring** has been added to the **Type** drop down box.

[18] **Flooring** should now be selected in the **Type** drop down box.

[19] Enter a **Wastage** percentage of **10**.

[20] Now we have entered all the necessary details for our **Beech Effect Small Board Laminate Flooring 1.75m2**, click **OK**.

You will see that **Beech Effect Small Board Laminate Flooring 1.75m2** has been added to the **Price Book** at the top of the screen.

[21] Now repeat steps [8] to [20] to add each of the following **Materials** into your **Master Price Book** (you won't need to add any new **Units of Purchase** or **Types**, just select the appropriate option from the drop down box):

Description	Unit Cost	Units of Purchase	Supplier	Type	Wastage %
Foam Underlay with DPM 10m2	18.00	Pack	Provisional	Laminate Flooring	10
Self Levelling Compound 22kg	16.00	Bag	Provisional	Concrete Products	7.5
Beech Effect Cloaking Strip 2m	4.00	Each	Provisional	Laminate Flooring	10

Now we will add the **Labour** resource *specialist floor fitter* to the **Price Book**. **Labour** resources should be added in the **Labour** section of the **Price Book**.

[22] To open up the **Labour** section of the **Price Book**, select **Labour** from the drop down box.

You are transferred to the **Labour** section of the **Price Book**.

[23] Scroll down the **Price Book** until you find **Specialist Fitter** in the **Description** column.

We will base our **Specialist Floor Fitter** on **Specialist Fitter**, as they will have similar properties.

[24] Highlight **Specialist Fitter** by clicking on it with your mouse and press **New Resource** button.

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

[25] Enter a **Description** of **Specialist Floor Fitter**.

[26] Enter a **Unit Cost** of **15.00**.

All the other categories can remain unchanged. The **Units of Purchase** is set to **Hours**, the **Supplier** is set to **Provisional** and the **Type** is set to **Sundry Labour**.

[27] Click **OK**.

The **Specialist Floor Fitter** has now been added to the **Price Book** above the **Specialist Fitter**:

Description	List Price	Discount	Adjustment	Unit of Supply	Purchase Cost	Supplier	Wastage	Date	Type
Roof Tilers Mate	£ 10.00	0.00%	0.00%	Hours	£ 10.00	Provisional	0.00%	September 27, 2006	Roof Tiler
General Labourer	£ 10.00	0.00%	0.00%	Hours	£ 10.00	Provisional	0.00%	September 27, 2006	Sundry Labour
Included in Subcontract	£ -	0.00%	0.00%	Unit	£ -	Provisional	0.00%	January 1, 2001	Sundry Labour
Included in Timber Frame	£ -	0.00%	0.00%	Unit	£ -	Provisional	0.00%	January 1, 2001	Sundry Labour
Not required	£ -	0.00%	0.00%	Unit	£ -	Provisional	0.00%	January 1, 2001	Sundry Labour
Specialist Floor Fitter	£ 15.00	0.00%	0.00%	Hours	£ 15.00	Provisional	0.00%	December 22, 2009	Sundry Labour
Specialist Fitter	£ 20.00	0.00%	0.00%	Hours	£ 20.00	Provisional	0.00%	September 27, 2006	Sundry Labour
To be defined	£ -	0.00%	0.00%	Unit	£ -	Provisional	0.00%	January 1, 2001	Sundry Labour

Now we have added all the **Resources** we need for our **Laminate Flooring Workbook**, we can move on to creating the **Workbook**.

Note: The resources we have added will not be automatically available in existing estimates, you will need to open the Price Book tab within the estimates and Synchronise to copy these new resources across.

1. Now you have added the necessary resources to the **Master Price Book**, to close and save the **Master Price Book**, press **Close** Button. You are transferred back to the **Library of Price Books**.

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

CREATING THE LAMINATE FLOORING WORKBOOK

15.00 Minutes

Having added the specialist laminate flooring resources to the **Master Price Book**, we are now ready to create the **Laminate Flooring Workbook**. This exercise will lead you through creating a new **Workbook** from scratch, creating its structure by adding rows of dimension and input options and calculations to the **Dimensions Screen**.

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

1. Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **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.

3. From the **Main Menu**, click on **My Settings**.

---

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

You are transferred to the **Library of Workbooks**. From the **Library of Workbooks**, you can modify master **Workbooks** and create your own **Workbooks**.

Workbook Name	Workbook Type	Remarks	.	Status	Linked To Spec	Last Modified
Attic Shaped Wall Finishing	Attic			Master	Yes	25/09/2006 14:20
Clad Dormer Walls For Flat Roof	Attic			Master	Yes	25/09/2006 14:19
Clad Dormer Walls For Hip Roof	Attic			Master	Yes	23/09/2006 15:59
Clad Dormer Walls For Slope Roof	Attic			Master	Yes	23/09/2006 16:01
Cut Roof Attic Interior Conversion	Attic			Master	Yes	23/09/2006 16:05
Lead Dormer Walls For Flat Roof	Attic			Master	Yes	23/09/2006 16:07
Lead Dormer Walls For Hip Roof	Attic			Master	Yes	23/09/2006 16:09
Lead Dormer Walls For Slope Roof	Attic			Master	Yes	23/09/2006 16:11
Loft Sundries	Attic			Master		23/09/2006 16:12

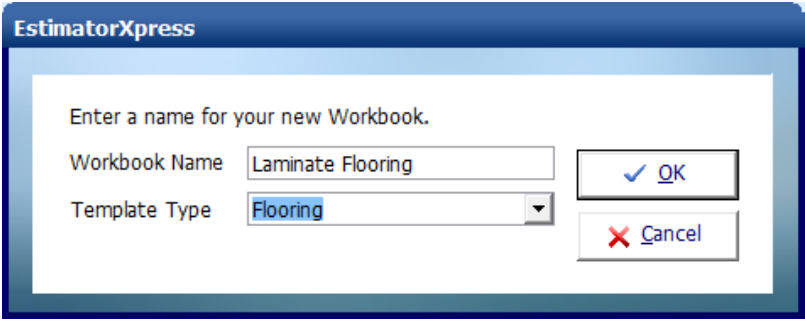[2] To create a new **Workbook**, press the **New Workbook** button.

If you have more than one **Price Book**, a dialog box pops up asking you to select a **Price Book**.

[3] Select the **Master Price Book** from the drop down box and click **Select**. If you only have one **Price Book**, **EstimatorXpress®** automatically selects the **Master Price Book.**

We have selected the **Master Price Book**, as this is where we added our specialist laminate flooring resources earlier. Later on, we will select resources from the **Master Price Book** to set as default resources in our **Laminate Flooring Workbook**.
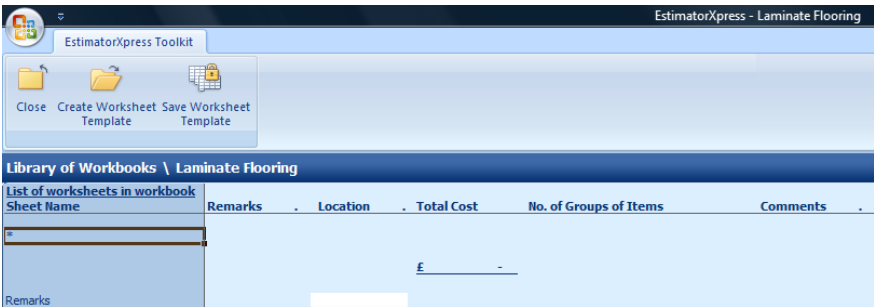
A dialog box pops up asking you to enter a **Name** and **Template Type** for your new **Workbook**.

[4] Enter **Laminate Flooring** into the **Workbook Name** input box.

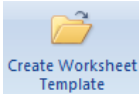[5] Select **Flooring** from the **Template Type** drop down box.

[6] Click **OK**.

You are transferred to the **Summary** of the **Laminate Flooring Workbook Template**. From here you can create, and subsequently reopen to edit the **Worksheet Template** of the **Laminate Flooring Workbook** using the **Create Worksheet Template** button. In addition, when you have finished creating the **Worksheet Template**, you can use the **Save Worksheet Template** button to lock down the **Workbook**.
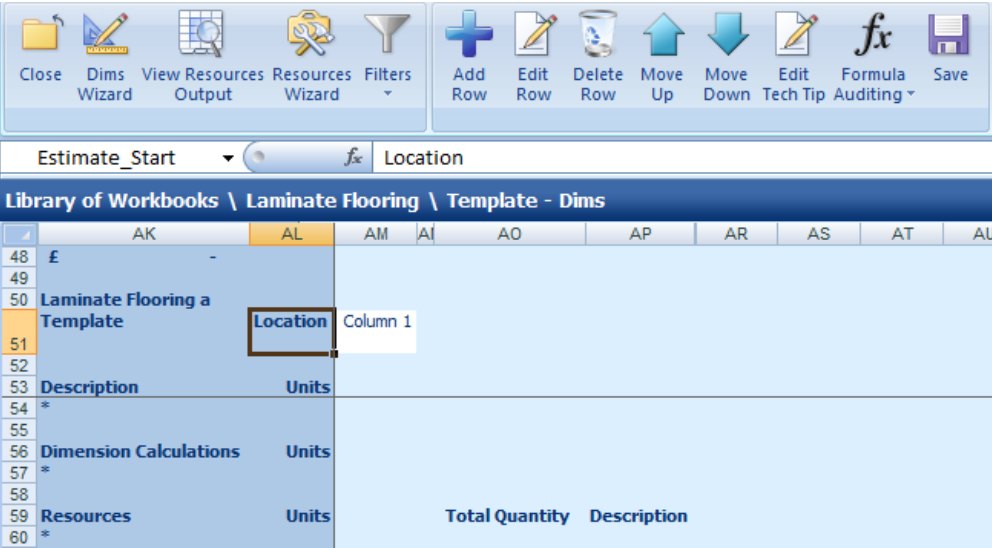

[7] Press **Create Worksheet Template**.

You are transferred to the **Dimensions Section** of the **Worksheet Template**.

As you can see, the **Dimensions Section of the Worksheet** is blank and contains no data. The screen is split into three sections: **Description**, **Dimension Calculations** and **Resources**.

In order to create the structure of the **Laminate Flooring Workbook**, it is first necessary to enter descriptions for dimensions and other input options, followed by intermediate dimension calculations to help build up the estimate and resource calculations.

Before entering any information consider the elements we need to estimate our laminate flooring. The materials required are likely to be levelling compound, underlay, laminate flooring and cloaking strip. Labour is required to lay levelling compound, underlay, flooring and then to fit the perimeter cloaking strip.

To estimate this we need to input the dimensions and other fields required to calculate the amount of resources to be used.

To calculate flooring, underlay and levelling compound, we need to know the area of the room which we can calculate if we provide the length and width of the room, together with any additional unusually shaped areas. To calculate the length of cloaking strip required, we also need to know the perimeter of the room. In order to create a flexible estimator we will make levelling the floor and laying underlay optional tasks as we may not need to do these tasks on every floor we estimate. To accomplish all these aspects of flooring we first need to input rows under the **Description** section of the screen.

We can then add rows to calculate the areas within the **Dimension Calculations** section of the screen, using Excel formulas.

Finally we then calculate the quantities of **Resources**, such as area of flooring and underlay, and length of cloaking strip required under the **Resources** section of the screen.

We will start by adding rows with dimension and input options to the top section of the screen, under **Description**.

[8]   Click on the asterisk (*) under **Description**.

[9]   Press the **Add Row** button.

A dialog box pops up.

[10] Enter **Length of floor** into the **Description** input box.

[11] Select **M** from the **Units** drop down box.

[12] Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**. A new row called **Length of floor** has been added under **Description**.

We will create a **Tech Tip** for **Length of floor** which helps the user input the correct dimension or information.

[13] Highlight the cell which says **Length of floor**.

[14] Press the **Edit Tech Tip** button.

Edit Tech Tip

Edit your Tech Tip for 'Length of floor' below:

Enter the length of the floor in metres.

✔ OK   ✘ Cancel

The **Edit Tech Tip** dialog box pops up.

[15] Type into the cell **Enter the length of the floor in metres**.

[16] Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**.

Library of Workbooks \ Laminate Flooring \ Template - Dims

	AK	AL	AM	Al	AO	AP	AR	AS	AT	AU	AV	AW
48	£	-										
49												
50	**Laminate Flooring**											
	Template	**Location**	Column 1									
51												
52												
53	**Description**	**Units**										
54	Length of floor	M	-									
55	*											
56												
57	**Dimension Calculations**	**Units**										
58	*											
59												
60	**Resources**	**Units**		**Total Quantity**	**Description**							
61	*											

NOTE: A red triangle has appeared in the corner of the Length of floor cell. If you hold your mouse over the triangle (but don't click it), the **Tech Tip** will pop up.

[17] Repeat steps [8] to [16] to add **Rows** and **Tech Tips** for each of the remaining **Descriptions** in the table below:

For the last two rows make sure to untick "Format input as a number"

| Description	Units	Tech Tip
Width of floor	M	Enter the width of the floor in metres.
Additional areas of floor	M2	Enter any additional irregular areas of floor in square metres.
Length of edging	M	Enter the perimeter of the floor in metres.
Is the floor to be levelled?	Y/N	If the floor is to be levelled with self-levelling compound, enter Y. Otherwise, enter N.
Is there to be an underlay?	Y/N	If underlay is to be laid, enter Y. Otherwise, enter N.

Your screen should now look like this:
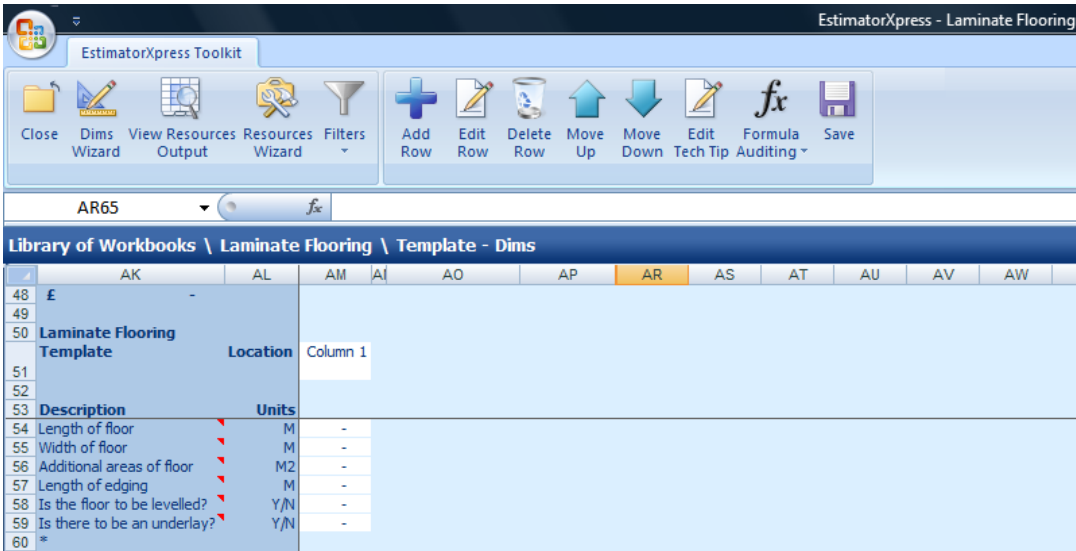
[18] At this point, it's a good idea to manually save your work by pressing the **Save** button. Elsewhere in the software, **EstimatorXpress®** automatically saves when you move between screens. When creating Workbooks, because you spend long periods of time working on the same screen, it is advisable to manually save to avoid losing work. Press **Save** button periodically, for example every 15 minutes.

[19] It is helpful when creating a **Worksheet Template**, to enter dummy data into the cells. This makes it easier to check that formulas are correct when entering calculations. Enter the following data into the white column adjacent to the **Descriptions**:

Description	Data
Length of floor	4
Width of floor	3
Additional areas of floor	1
Length of edging	16
Is the floor to be levelled?	Y
Is there to be an underlay?	Y

Your screen should now look like this:
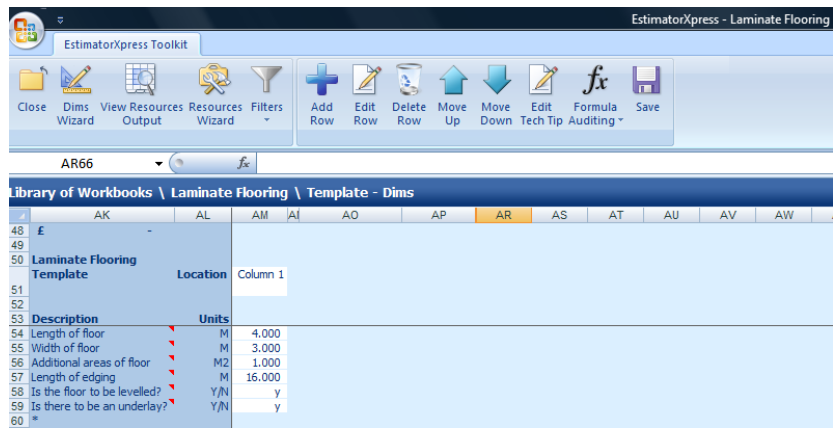
Next we will enter an intermediate calculation which will calculate the area of the floor. To do this, we can add a row under the **Dimension Calculations** section of the screen.

[20] Click on the asterisk (*) under **Dimension Calculations**.
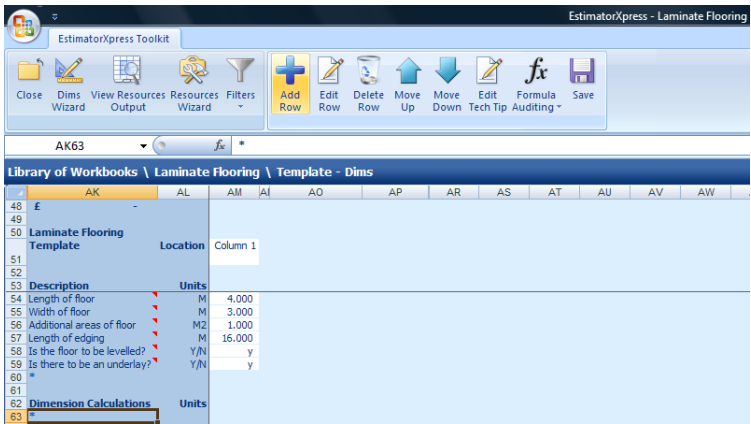
[21] Press the **Add Row** button.

The **Add Row** dialog box pops up.
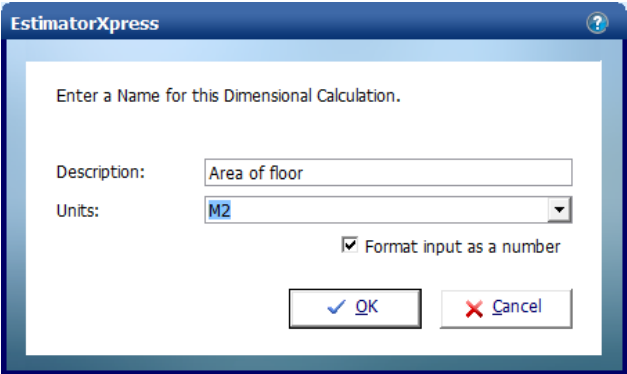
[22] Enter **Area of floor** into the **Description** input box.

[23] Select **M2** (metre squared) from the **Units** drop down box.

[24] Click **OK**.

EstimatorXpress

Enter a Name for this Dimensional Calculation.

Description: Area of floor

Units: M2

☑ Format input as a number

✓ OK   ✗ Cancel

A new row called **Area of floor** will have been added under **Dimension Calculations**.
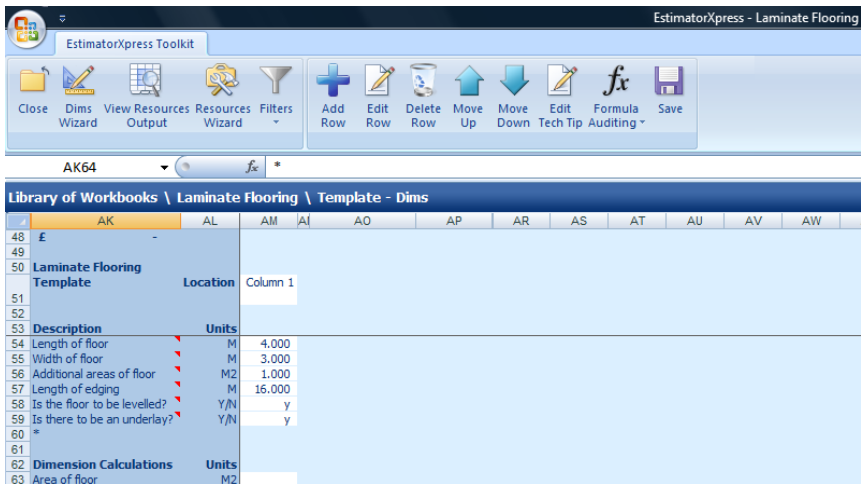
Now we are going to enter the formula to calculate the area of the room, using standard Excel formula. To do this we need to multiply the **Length of floor** by the **Width of floor**, and add **Additional areas of floor**.

[25] On the row you have just added, click on the white cell adjacent to **Area of floor**.

[26] Type **=** into the cell.

[27] Click on the white cell adjacent to **Length of floor**.

[28] Type * (this is the Excel symbol for multiplied by).

[29] Click on the white cell adjacent to **Width of floor.**

You will see that the cell references of the cells you have clicked on have been added to the formula.

[30] Type **+** (this is the Excel symbol for add).

[31] Click on the white cell adjacent to **Additional areas of floor**.

The formula should now look like this:

=AM54*AM55+AM56

[32] Press the Enter key on your keyboard.

The software will automatically calculate the area of the floor, using the dummy data we entered earlier. Our formula has calculated that the floor area is 13m^2:

[33] Press the **Save** button.

Now we will add rows to calculate the quantity of resources associated with laying our laminate flooring.
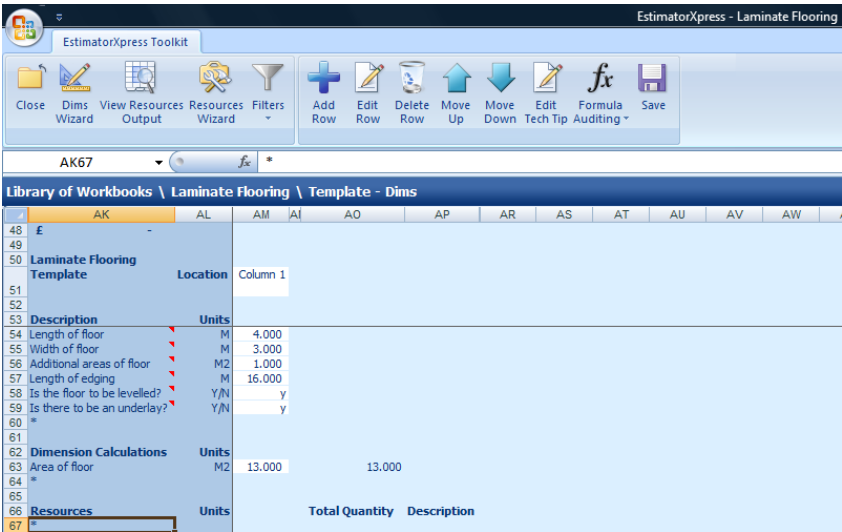
[34] Click on the asterisk (*) under **Resources**.

[35] Press the **Add Row** button.

A dialog box pops up.

[36] Enter **Levelling compound** into the **Description** input box.

NOTE: The **Description** you enter here will appear in the **Item used for column** in the **View Resources Output** area.

[37] Select **M2** from the **Units** drop down box.

[38] Select **Material** from the **Resource Section** drop down box.

[39] Select **Internal Fitting Out** from the **Build Phase** drop down box.

[40] Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**. A new row called **Levelling compound** has been added under **Resources**.

Earlier, we entered a Y/N question of **Is the floor to be levelled?** The calculation for levelling compound is dependent on whet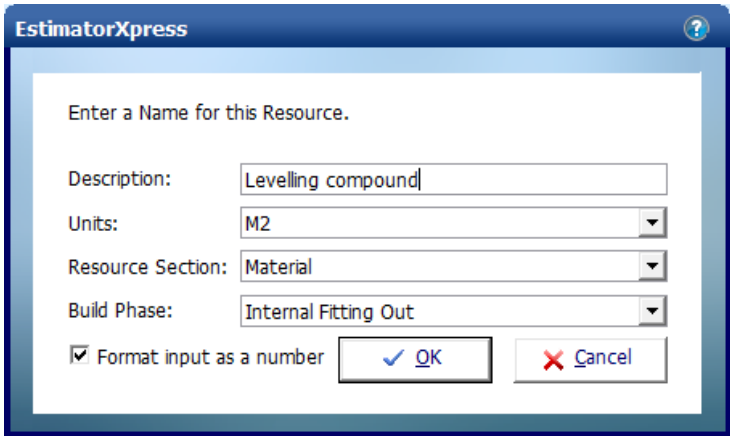her this cell is set to Y or N so we need to enter an IF formula which does calculations based on whether the **Is the floor to be levelled?** cell is set to Y or N.

[41] On the row you have just added, click on the white cell adjacent to **Levelling compound**.

[42] Type **=** into the cell.

[43] Just under the Menu, click where is says **fx**.

[44] Select **IF** from the scroll menu.

[45] Click **OK**.

NOTE: For more information on inputting formulas into spreadsheets, go to the Formula Auditing drop down menu and select Formula Help. Here you will find advice on the different types of formula available and how to use them.

The **Function Arguments** dialog box pops up.

[46] Click your mouse on the *Logical_test* input box.

[47] Click on the white cell adjacent to **Is the floor to be levelled?** on the **Dimensions Screen**.

[48] Type **= "Y"** on your keyboard, as shown on the image below. (Don't forget to add the quotation marks either side of the Y).
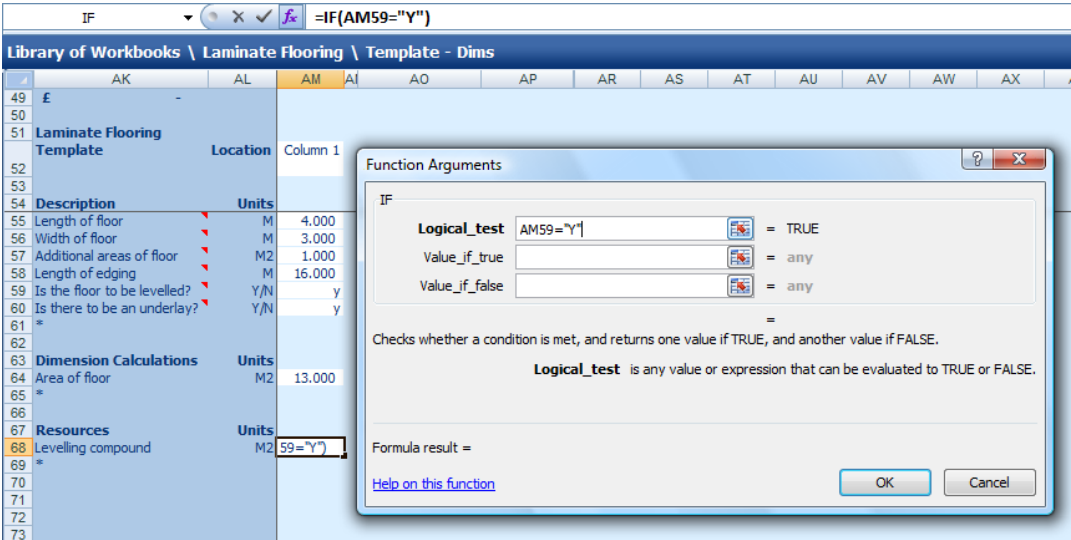
[49] Click your mouse on the *Value_if_true* input box.

[50] Click on the white cell adjacent to **Area of floor**.
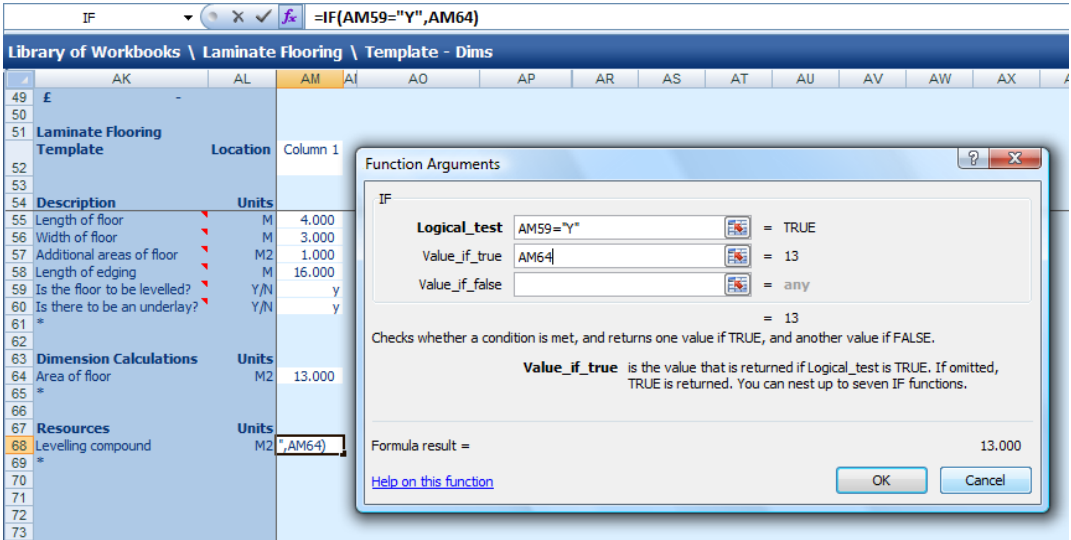
This means that if the **Is floor to be levelled?** row is set to Y, EstimatorXpress® will calculate the area of levelling compound based on the area calculated in the **Area of floor** row.

[51] Click your mouse on the *Value_if_false* input box.

[52] Type **0** into the input box.

This means that if the **Is floor to be levelled?** row is set to N, EstimatorXpress® will automatically set the quantity of levelling compound to 0.

[53] Click **OK**.

The formula should now look like this:

=IF(AM59="Y",AM64,0)

As we have entered a Y into the cell, the formula has calculated that we need 13.00m² of Levelling compound.

[54] Repeat steps [34] to [53] to add rows and formulas for the Resources in the chart below:

NOTE: These formulas will only be correct if you add the rows in the order below, entering each formula immediately after adding the row. This is because EstimatorXpress® is automatically inserting rows in other parts of the Worksheet.

Description	Units	Resource Section	Build Phase	Formula
Underlay	M2	Material	Internal Fitting Out	=IF(AM61="Y",AM65,0)
Flooring	M2	Material	Internal Fitting Out	=AM66
Cloaking strip	M	Material	Internal Fitting Out	=AM61
Lay levelling compound	M2	Labour	Internal Fitting Out	=AM72
Lay underlay	M2	Labour	Internal Fitting Out	=AM74
Lay flooring	M2	Labour	Internal Fitting Out	=AM76
Fit cloaking strip	M	Labour	Internal Fitting Out	=AM78

NOTE: When entering the formula for underlay, repeat steps [34] to [53], entering **AM61="Y"** into the **Logical_test** input box, **AM65** into the *Value_if_true* input box and **0** into the *Value_if_false* input box.

After adding your **Resources**, the **Resources** section of the screen should look like this:

	Resources	Units		Total Quantity	Description
74	Resources	Units		Total Quantity	Description
75	Levelling compound	M2	13.000	13.000	To be defined
76	Underlay	M2	13.000	13.000	To be defined
77	Flooring	M2	13.000	13.000	To be defined
78	Cloaking strip	M	16.000	16.000	To be defined
79	Lay levelling compound	M2	13.000	13.000	To be defined
80	Lay underlay	M2	13.000	13.000	To be defined
81	Lay flooring	M2	13.000	13.000	To be defined
82	Fit cloaking strip	M	16.000	16.000	To be defined
83	*				

[55] Press the **Save** button to save all the work you have done.
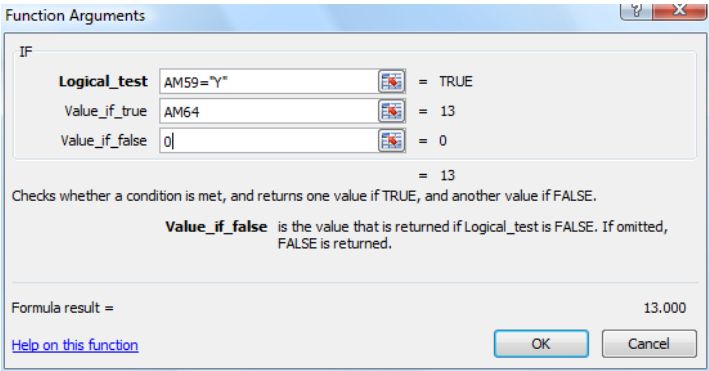
Cast your eye over the figures to check the formulas are correctly calculating the resources using the dummy data. Try entering alternative information, including Y or N, into the appropriate cells and check the answers manually. Once you are satisfied that all the calculations are working correctly, reset the input values to the original values.

NOTE: Don't worry if the formulas you entered first seem to have changed from the formulas in the chart above. This is because EstimatorXpress® is automatically inserting rows in other parts of the worksheet and is automatically adjusting the formulas as necessary.

Well done! You've finished entering all of the calculations required to do the estimating of the laminate floor. We are now going to turn our attention to specifying the default materials for our **Laminate Flooring Workbook**.

If you wish to stop and close the Workbook you have created so far:	
1. Press the **Close** Button. You are transferred back to the **Summary of the Worksheet Template**.	Close
2. In the **Summary of the Worksheet Template**, press the **Close** button to return to the **Library of Workbooks**.	Close
3. In the **Library of Workbooks**, press the **Close** button to return to the **My Settings Menu**.	Close

SPECIFYING RESOURCES IN THE WORKBOOK

10.00 Minutes

This exercise will talk you through setting up default resources in the **Laminate Flooring Workbook**, specifying the material and labour resources we added to the **Master Price Book** earlier.

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

1. Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

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.

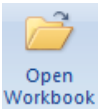2. From the **Main Menu**, click on **My Settings**.

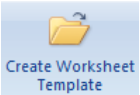3. From the **My Settings Menu**, click on **My Workbooks** button.

4. Locate and click on the **Laminate Flooring Workbook** in the **Library of Workbooks**.

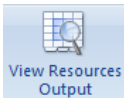5. Press the **Open Workbook** button.

6. Press the **Create Worksheet Template** button.

You are now in the **Dimensions Screen** of the **Laminate Flooring Workbook**.

Library of Workbooks \ Laminate Flooring \ Template - Dims

	AK	AL	AM	AI	AO	AP	AR	AS	AT	AU
56	£	-								
57										
58	**Laminate Flooring Template**	**Location**	Column 1							
59										
60										
61	**Description**	**Units**								
62	Length of floor	M	4.000							
63	Width of floor	M	3.000							
64	Additional areas of floor	M2	1.000							
65	Length of edging	M	16.000							
66	Is the floor to be levelled?	Y/N	y							
67	Is there to be an underlay?	Y/N	y							
68	*									
69										
70	**Dimension Calculations**	**Units**								
71	Area of floor	M2	13.000		13.000					
72	*									
73										
74	**Resources**	**Units**			**Total Quantity**	**Description**				
75	Levelling compound	M2	13.000		13.000	To be defined				
76	Underlay	M2	13.000		13.000	To be defined				
77	Flooring	M2	13.000		13.000	To be defined				
78	Cloaking strip	M	16.000		16.000	To be defined				
79	Lay levelling compound	M2	13.000		13.000	To be defined				
80	Lay underlay	M2	13.000		13.000	To be defined				
81	Lay flooring	M2	13.000		13.000	To be defined				
82	Fit cloaking strip	M	16.000		16.000	To be defined				
83	*									

[1]   Press the **View Resources Output** button.

You are transferred to the **Resources Section** of the **Worksheet**. From here you can specify the resources you wish to use in your **Workbook**.

Currently, all resources are set as **To be defined**. We will now specify the **Materials** we are going to use, by selecting the **Materials** we added to the **Master Price Book**.

[2]   Click on the resource called **Levelling Compound** in the **Item used for:** column.

[3]   Press the **Change Resource** button.
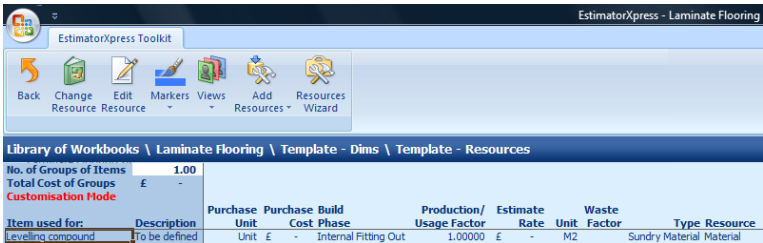
Now we need to locate the levelling compound material we added to the **Price Book** earlier.
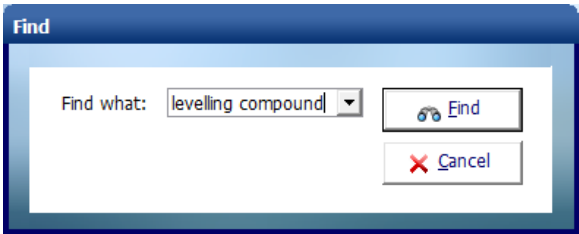
[4]   Press the **Find** button.
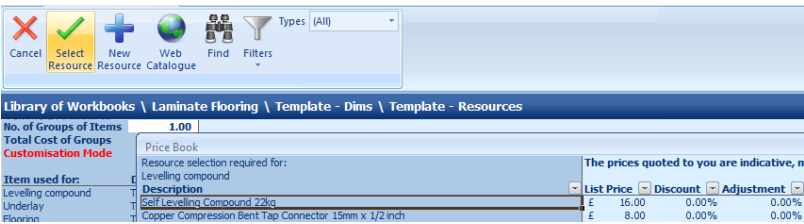
The **Find** dialog box pops up.

[5]   Type "levelling compound" into the drop down box.

[6]   Click **Find**.

In the **Price Book**, the material called **Self Levelling Compound 22kg** is highlighted.

[7]   Click **Cancel** to close the Find dialog box after you have located the Self Levelling Compound.

[8]   Press the **Select Resource** button.

You are transferred back to the **Resources Section of the Workbook** where the **Edit Resource** dialog box is open. We need to enter the **Usage Factor** for this resource.

As we know, we can get 5m² coverage at 3mm from a 22kg bag of levelling compound, it takes 1/5 (20%) of a bag to do 1m². Therefore we will set the **Usage Factor** to 0.2.

[9] Click on the white cell adjacent to **Usage Factor** and delete its contents.

[10] Type in 0.2.

[11] We are happy with the all the other details, so click **OK**.

Edit Resource

Purchase Cost
Item used for: Levelling compound
Self Levelling Compound 22kg
£16.00 per Bag

Usage
Usage Units: M2
Usage Factor: 0.2

Estimate Rate
£3.20 per m²

Purchase Quantities
Quantity: 13
Wastage: 7.50%

Build Phase
Internal Fitting Out

Cost Summary
Cost: £41.60
Wastage Cost: £3.12
Total Cost: £44.72

✓ OK   ✗ Cancel

NOTE: The **Usage Factor** is the proportion of the **Purchase Unit** required to do a **Usage Unit**.

NOTE: Another way of working out the **Usage Factor** is by pressing the calculator button. This launches the **Usage Factor Calculator**.

Simply enter that 1 Bag is used for 5m² and it calculates the **Usage Factor** as 0.2 for us.

Usage Factor Calculator

I use 1 Bag of 'Self Levelling Compound 22kg'

for 5 m² of 'Levelling compound'

Estimates:
2.60 Bags of 'Self Levelling Compound 22kg' for this job of 13.00 m² at a cost of £41.60 excluding wastage

☐ Including Wastage

Usage Factor:
0.2

✓ OK   ✗ Cancel

You will see that EstimatorXpress® has automatically calculated the costs associated with the levelling compound.

Library of Workbooks \ Laminate Flooring \ Template - Dims \ Template - Resources

No. of Groups of Items	1.00
Total Cost of Groups	£ 44.72
Customisation Mode	

Item used for:	Description	Purchase Unit	Purchase Cost	Build Phase	Production/ Usage Factor	Estimate Rate	Unit	Waste Factor
Levelling compound	Self Levelling Compound 22kg	Bag £	16.00	Internal Fitting Out	0.20000	£ 3.20	M2	7.50%
Underlay	To be defined	Unit £	-	Internal Fitting Out	1.00000	£ -	M2	
Flooring	To be defined	Unit £	-	Internal Fitting Out	1.00000	£ -	M2	

Repeat steps [2] to [11] to specify the remaining **Material Resources** as per the table below, starting by clicking on the relevant **Item Used For**:

Item Used For	Resource to Select from Price Book	Usage Factor
Underlay	Foam Underlay with DPM 10m2	0.1
Flooring	Beech Effect Small Board Laminate Floor 1.75m2	0.57
Cloaking Strip	Beech Effect Cloaking Strip 2m	0.5

After specifying the **Material Resources**, your screen should look like this:

We will now specify the **Labour Resources** we are going to use, by selecting the **Specialist Floor Fitter** we added to the **Master Price Book**.

[12] Click on the Item used for called **Lay levelling compound** with your mouse to highlight it.

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

Now we need to locate the **Specialist Floor Fitter** we added to the **Price Book**.

[14] Press the **Find** button.

The **Find** dialog box pops up.

[15] Type "specialist floor fitter" into the drop down box.

[16] Click **Find**.

In the **Price Book, Specialist Floor Fitter** is highlighted.

[17] Click **Cancel** to close the **Find** dialog box.

[18] Press the **Select Resource** button.

The **Edit Resource** dialog box is now open in the **Resources Section**.

As we know, our **Specialist Floor Fitter** can lay 8m^2 of levelling compound in 1 hour; it takes 1/8 or 0.125 of an hour to do 1m^2 so we need to set the **Usage Factor** to 0.125.

[19] Click on the white cell adjacent to **Usage Factor** and delete its contents.

[20] Type in 0.125.

[21] We are happy with all the other details, so click **OK**.

Edit Resource

Purchase Cost
Item used for: Lay levelling compound
Specialist Floor Fitter
£15.00 per Hours

Usage
Usage Units: M2
Usage Factor: 0.125

Estimate Rate
£1.88 per m²

Purchase Quantities
Quantity: 13
Wastage: 0.00%

Build Phase
Internal Fitting Out

Cost Summary
Cost: £24.38
Wastage Cost: £0.00
Total Cost: £24.38

✓ OK   ✗ Cancel

[22] Repeat steps [12] to [21] to specify the remaining **Labour Resources**, as per the table below, remembering to click on the relevant **Item Used For**:

Item Used For	Resource to Select from Price Book	Usage Factor
Lay underlay	Specialist Floor Fitter	0.05
Lay flooring	Specialist Floor Fitter	0.6
Fit cloaking strip	Specialist Floor Fitter	0.2

NOTE: The **Usage Factors** for the labour associated with laying laminate flooring will vary depending on the size and shape of the room you are fitting, because the timings for the tasks will vary.

After specifying all the **Materials** and **Labour Resources**, your screen should look like this:

Library of Workbooks \ Laminate Flooring \ Template - Dims \ Template - Resourc

			Purchase Unit	Purchase Cost
No. of Groups of Items		1.00		
Total Cost of Groups	£	508.56		
Customisation Mode				
Item used for:	Description			
Levelling compound	Self Levelling Compound 22kg		Bag £	16.00
Underlay	Foam Underlay with DPM 10m2		Pack £	18.00
Flooring	Beech Effect Small Board Laminate Floor 1.75m2		Pack £	25.00
Cloaking strip	Beech Effect Cloaking Strip 2m		EA £	4.00
Lay levelling compound	Specialist Floor Fitter		Hours £	15.00
Lay underlay	Specialist Floor Fitter		Hours £	15.00
Lay flooring	Specialist Floor Fitter		Hours £	15.00
Fit cloaking strip	Specialist Floor Fitter		Hours £	15.00
*				
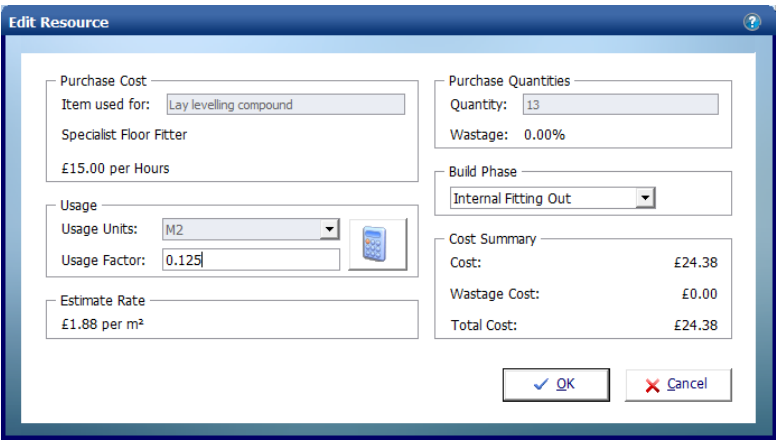
CREATING THE DIMENSIONS WIZARD

15.00 Minutes

This exercise will talk you through creating a **Dimensions Wizard** for the **Laminate Flooring Workbook**.
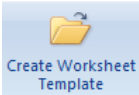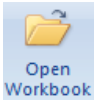

If you wish to start this exercise having closed EstimatorXpress®:

1. Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

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.

2. From the **Main Menu**, click on the **My Settings**.

3. From the **My Settings Menu**, click on the **My Workbooks** button.

4. Locate and click on the **Laminate Flooring Workbook** in the **Library of Workbooks**.

5. Press the **Open Workbook** button.

Open Workbook

6. Press the **Create Worksheet Template** button.

Create Worksheet Template

You are now in the **Dimensions Screen** of the **Laminate Flooring Workbook**.

Library of Workbooks \ Laminate Flooring \ Template - Dims

	AK	AL	AM	AI	AO	AP	AR
56	£	451.50					
57							
58	**Laminate Flooring Template**	**Location**	Typical area of flooring				
59							
60							
61	**Description**	**Units**					
62	Length of floor	M	4.000				
63	Width of floor	M	3.000				
64	Additional areas of floor	M2	1.000				
65	Length of edging	M	16.000				
66	Is the floor to be levelled?	Y/N	Y				
67	Is there to be an underlay?	Y/N	Y				
68	*						
69							
70	**Dimension Calculations**	**Units**					
71	Area of floor	M2	13.000		13.000		
72	*						
73							
74	**Resources**	**Units**		**Total Quantity**	**Description**		
75	Levelling compound	M2	13.000	13.000	Self Levelling Compound 22kg		
76	Underlay	M2	13.000	13.000	Foam Underlay with DPM 10m2		
77	Flooring	M2	13.000	13.000	Foam Underlay with DPM 10m2		
78	Cloaking strip	M	16.000	16.000	Beech Effect Cloaking Strip 2m		
79	Lay levelling compound	M2	13.000	13.000	Specialist Floor Fitter		
80	Lay underlay	M2	13.000	13.000	Specialist Floor Fitter		
81	Lay flooring	M2	13.000	13.000	Specialist Floor Fitter		
82	Fit cloaking strip	M	16.000	16.000	Specialist Floor Fitter		
83	*						

 [1] Press the **Dims Wizard** button.

The Dims Wizard dialog box will automatically pop up. You will see that there are already input boxes with descriptions for the inputs we previously created in the **Worksheet Template**.

[2] Press the **Edit** button.

The **Edit Toolbar** of the **Dims Wizard** will open up. The **Edit Toolbar** contains a range of tools which will help you create the **Dims Wizard**.

NOTE: Click the question mark in the top right corner for a detailed explanation of all the tools on the **Edit Toolbar**.
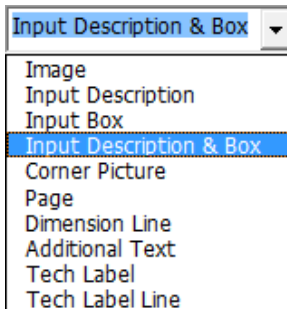

The **Object Selection** drop down box above the **Delete** and **Add** buttons allows you to select different types of item for editing.

Selecting a different item from the list will allow you to edit its position and appearance on the page.

A **Dimensions Wizard** can have up to 5 pages that run in sequence by pressing the **Next** button and each can have their own (or share another) optional page that is accessed by clicking the button in the bottom left of the dialog. If you need to create an additional sequential page you first need to select **Page** from the **Object Selection** drop down box and then click the **Add** button. You can also select a different type of item in some cases by double-clicking on that item i.e. an input box, description or picture.

The first thing we are going to do is enter a title for the page.

[3]   Highlight the text "Please enter the title here" (top left of the window) and then type *Laminate flooring*.

Next we are going to move all of the input and description boxes to the right side of the window. This should give us space to insert an Image and then move each Input Description and Input Box to a better location.

[4]   Make sure Input **Description & Box** is still selected in the drop down box.
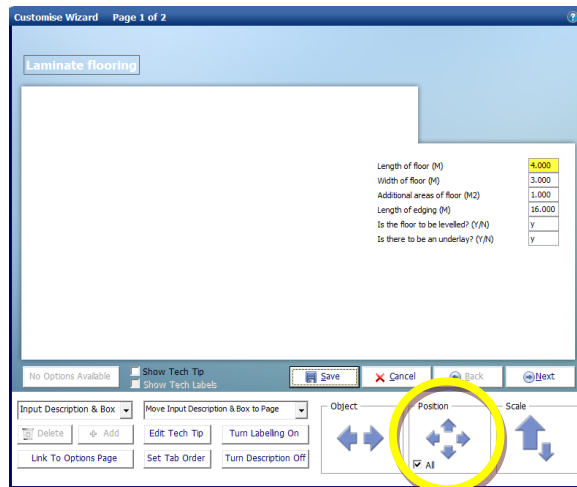
[5]   Tick the **All** check box under the **Position** button and then use the direction arrows (up, down, left and right) to move all of the items to the right of the window. (holding down the mouse button will move the items more rapidly)

NOTE: You could move each box manually by dragging & dropping it over onto the right hand side. We are going to use the arrow keys so that it keeps all of the boxes nicely lined up with each other.
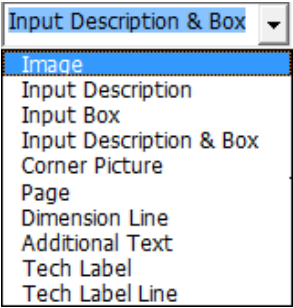
Now that we have a clear space in the middle of the **Dims Wizard** we are going to add a picture that we can arrange some of the Dimensional Input Boxes around.

[6] To insert an image into the Dimensions Wizard select **Image** from the drop down box.

[7] Click the **Add** button. This will open a window titled "Select picture to Import".

(You can use any picture you want; for this example we are going to navigate to the images folder used by EstimatorXpress® and use a picture of some floorboards)

The dialog box will open up showing the different folders of images used by EstimatorXpress® for all the **Dims Wizards** in the system.

[8] Open the *Suspended Floor* folder.

[9] Select the picture entitled *Plan view of Floorboards.gif* and click **Open.**
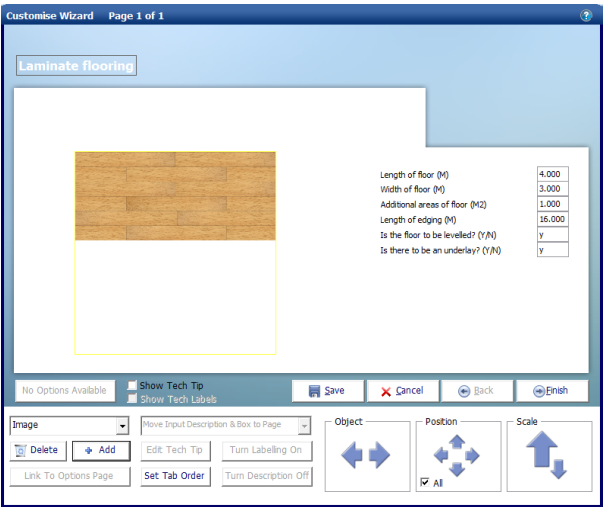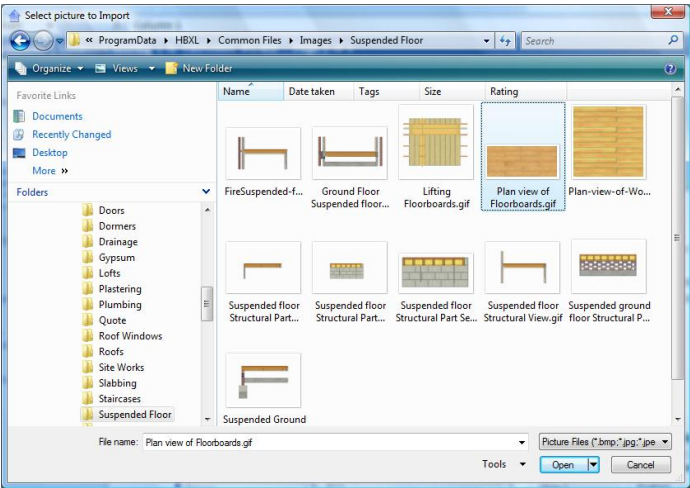
The image you have selected will now appear.

[10] Click on the image and hold down the left mouse button whilst dragging it into position on the page.

[11] Use the Scale buttons to increase the size of the image until it suits the space available on the page.

Next we are going to place the dimensional input boxes and their associated labels. Firstly we will place the **Length of floor** and **Width of floor** inputs next to the image.

[12] Double click on the dimensional input box next to the label **Length of floor.** It will then be highlighted in yellow to show that it will be selected.

[13] Click on the box and hold the left mouse button down whilst you drag the box to the bottom of the laminate floor image.

Length of floor (M)	
Width of floor (M)	3.000
Additional areas of floor (M2)	1.000
Length of edging (M)	16.000
Is the floor to be levelled? (Y/N)	Y
Is there to be an underlay? (Y/N)	Y

4.000

Because we have put the Dimension Input Box next to the picture there is no need to keep the label so we can now turn it off.

Turn Description Off   [14] Click on **Turn Description Off** to remove the label **Length of floor (M)** from the dialog.

3.000

Additional areas of floor (M2)	1.000
Length of edging (M)	16.000
Is the floor to be levelled? (Y/N)	Y
Is there to be an underlay? (Y/N)	Y

4.000

[15] Repeat steps [12] to [14] in order to place the **Width of floor** input box.

[16] Select each of the other input boxes and descriptions in turn (or together by selecting **Input Description & Box** from the dropdown) and arrange them on the right hand side of the page.

Input Box

- Image
- Input Description
- Input Box
- Input Description & Box
- Corner Picture
- Page
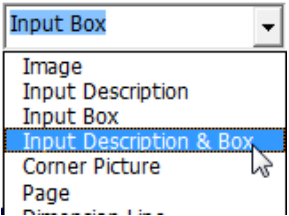
Next we will place some lines on the picture to signify where the length and width dimension boxes are measured from.

[17] Select **Dimension Line** from the dropdown.

+ Add   [18] Click the **Add** Button. A horizontal line will appear on the dialog.

As you move your mouse over the line you will notice that the mouse pointer will change. In the middle of the line the mouse will change to show that you can click to move the line. At either end of the line the cursor will change to show that you can move the end point of the line.
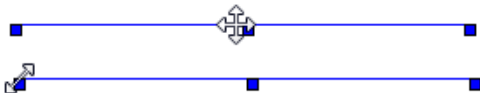
[19] Move the line to the bottom of the laminate floor image.

Scale

[20] Use the **Scale** buttons, or click on the end of the line and drag the line, to increase the length of the line until it is slightly longer than the laminate floor.

[21] Centre the line so it has an equal amount extending past the laminate floor image.

4.000

[22] Click the **Add** button again to add a second line. This time we want to add a small vertical line at the left end of the floor image.

[23] Drag the line and move it to add a vertical line at the end of the first line we have placed.

[24] Click the **Add** button again to add a third line. This time you will notice that it has added a line the same length and level with the line we have just added. This makes it easy to place the final line as all we need to do is use the right direction line to move it to the other end of the floor image.
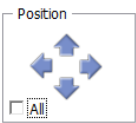
[25] Click the right Position Direction Arrow to move the line to the other end of the laminate floor image.

[26] Using the skills you've just learned, add lines to the right side of the image to show what the **Width of floor** input box is referring to.

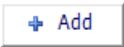Your **Dimension Wizard** should now look like this:
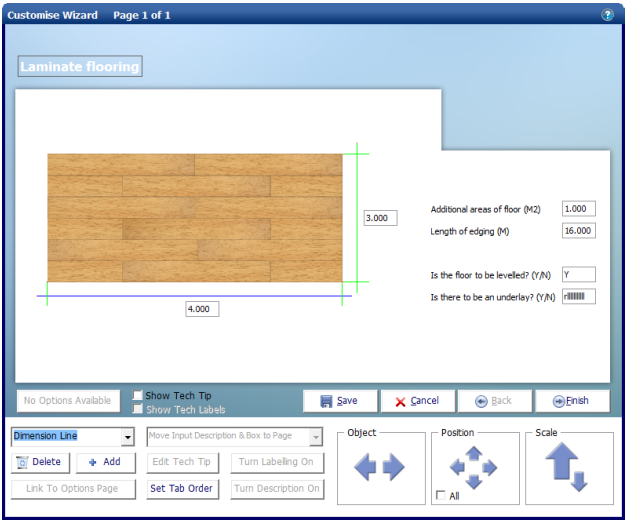
[27] Click the **Save** button to save our progress so far.

[28] Click the **Edit** button to continue developing the wizard.
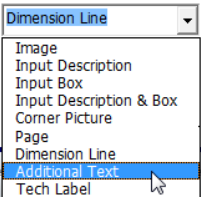
[29] Select **Additional Text** from the dropdown.

[30] Click the **Add** button to add a new piece of text.

A label will appear on the dialog saying **type label here**.

[31] Change the text to say **PLAN VIEW OF LAMINATE FLOOR.**

[32] Double click on the label to lock the text and change it into placement mode.
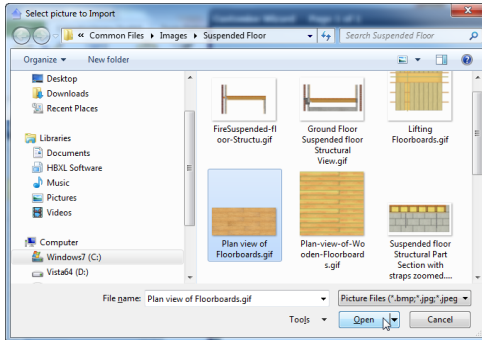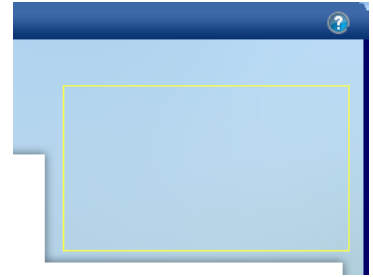
[33] Drag the label to the bottom of the dialog to place it as required.

[34] Double click in the top right corner of the dialog to select the corner picture.

A yellow box will appear to show that the corner picture is selected.

[35] Double click on the image again.

A dialog box appears inviting you to **Select picture to import**.

[36] Select a suitable image for the corner of the **Dimensions Wizard**.

[37] A box pops up asking if you wish to enter a web link. If you were producing a **Workbook** for a specific manufacturer's product you may wish to put a link in to the manufacturer. Once you have entered the link clicking on the corner image whilst using the **Workbook** will launch the website.

[38] Click **Cancel** to skip setting up a web link.

The **Dimension Wizard** is now complete.
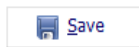
[39] Click **Save** to save the wizard.
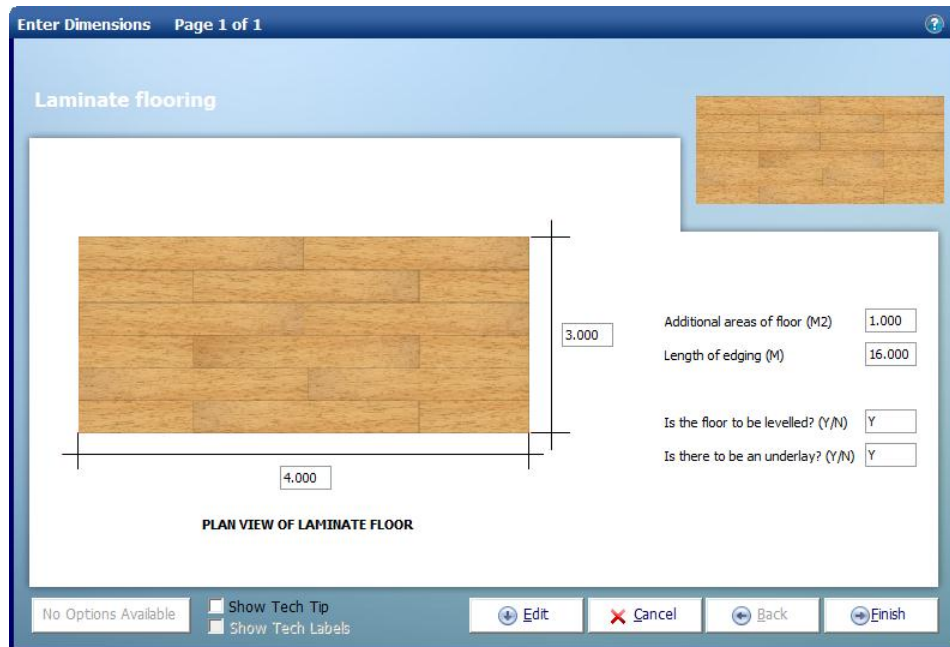
[40] Click **Finish** to close the **Dimensions Wizard**.

CREATING THE RESOURCES WIZARD

15.00
Minutes

This exercise will talk you through creating a **Resources Wizard** for the **Laminate Flooring Workbook**.
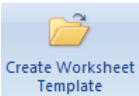

If you wish to start this exercise having closed EstimatorXpress®:

1.   Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on
      your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

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.

2.   From the **Main Menu**, click on **My Settings**.

3.   From the **My Settings Menu**, click the **My Workbooks** button.

4.   Locate and click on the **Laminate Flooring Workbook** in the **Library of Workbooks**.

5.   Press the **Open Workbook** button.

6.   Press the **Create Worksheet Template** button.

You are now in the
Dimensions Screen of the
**Laminate Flooring
Workbook**.

Library of Workbooks \ Laminate Flooring \ Template - Dims

	AK	AL	AM	AI	AO	AP	AR
56	£ 451.50						
57							
58	**Laminate Flooring**						
	Template	**Location**	Typical				
59			area of flooring				
60							
61	**Description**	**Units**					
62	Length of floor	M	4.000				
63	Width of floor	M	3.000				
64	Additional areas of floor	M2	1.000				
65	Length of edging	M	16.000				
66	Is the floor to be levelled?	Y/N	Y				
67	Is there to be an underlay?	Y/N	Y				
68	*						
69							
70	**Dimension Calculations**	**Units**					
71	Area of floor	M2	13.000		13.000		
72	*						
73							
74	**Resources**	**Units**		**Total Quantity**	**Description**		
75	Levelling compound	M2	13.000		13.000 Self Levelling Compound 22kg		
76	Underlay	M2	13.000		13.000 Foam Underlay with DPM 10m2		
77	Flooring	M2	13.000		13.000 Foam Underlay with DPM 10m2		
78	Cloaking strip	M	16.000		16.000 Beech Effect Cloaking Strip 2m		
79	Lay levelling compound	M2	13.000		13.000 Specialist Floor Fitter		
80	Lay underlay	M2	13.000		13.000 Specialist Floor Fitter		
81	Lay flooring	M2	13.000		13.000 Specialist Floor Fitter		
82	Fit cloaking strip	M	16.000		16.000 Specialist Floor Fitter		
83	*						

[1] Click on the **Resources Wizard** button to open the Resources Window. You will notice it looks very similar to the Dimensions Wizard. In fact it works in almost exactly the same way.

[2] Click on the **Edit** button.
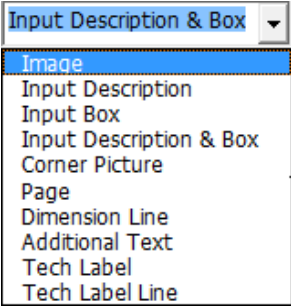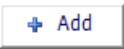
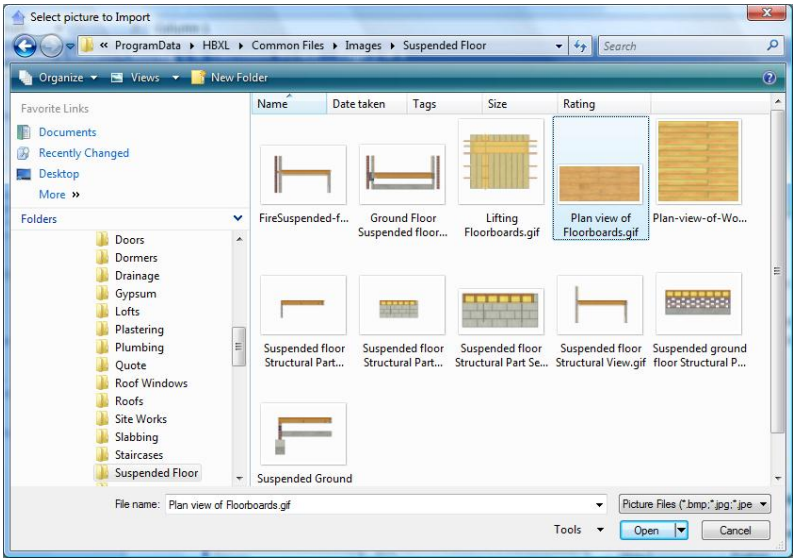[3] You will now see the same Edit controls that we used to create our **Dimensions Wizard**.

[4] Click on "Please enter the title here" and replace the text with "Laminate flooring"

[5]   To insert an image into the **Resources Wizard** select **Image** from the drop down box.

[6]   Then click the **Add** button. This will open a window titled "Select picture to Import".

[7]   Select the picture you want to use and click **Open.**

[8]   The image you have selected will now appear on the **Resources Wizard** page. You can click and drag the image to position it anywhere on the page.

[9]   Double-click to select the labels then use drag and drop to rearrange them.
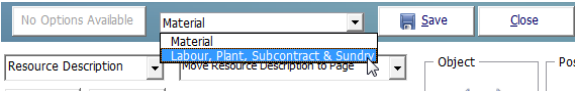
[10] Change the Resource Dropdown to select **Labour, Plant, Subcontract & Sundry.**

[11] Double-click to select the labels then use drag and drop to rearrange them.

[12] Using the same process as with the **Dims Wizard** set up a corner picture and add a label to describe the picture chosen.

[13] Click **Save** to save the wizard.

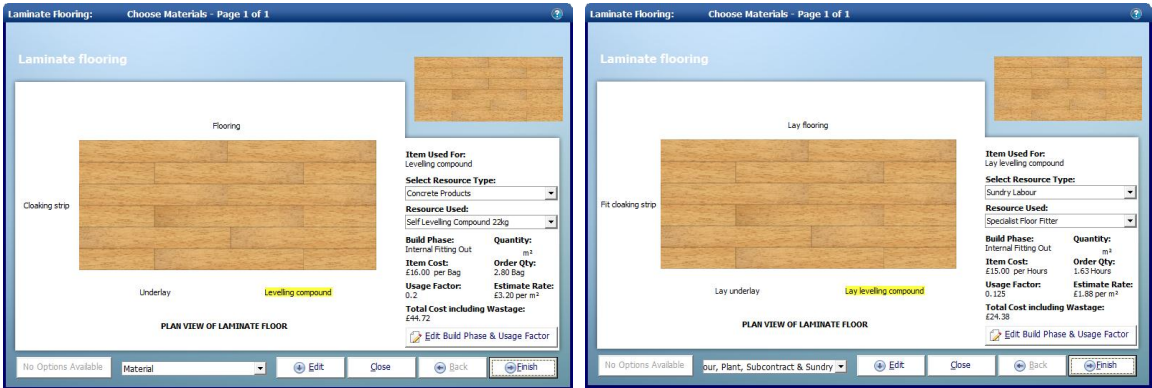Your **Resource Wizard** could now look something like this:

Now we have finished creating our **Dimensions Wizard** and our **Resources wizard** we are ready to lock down the **Workbook**. Locking a **Workbook** means you can no longer make changes to the **Workbook** or the **Dimensions Wizard.**

Before saving our new **Workbook** we'll change the name of the dimensions column.

Location	Typical area of flooring
Units	
M	4.000
M	3.000
M2	1.000
M	16.000
Y/N	Y
Y/N	Y

[14] Change the column heading from **Column 1** to **Typical area of flooring.**

[15] Press the **Close** button to close the **Worksheet Template**.

You are returned to the **Summary of the Worksheet Template**.
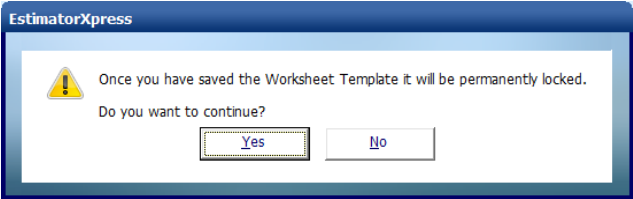
[16] Press the **Save Worksheet Template** button.

A dialog box pops up asking if you are sure you wish to lock down the **Worksheet Template**.

[17] Click **Yes** if you are happy that you have finished work on the **Workbook**.

EstimatorXpress

Once you have saved the Worksheet Template it will be permanently locked.

Do you want to continue?

Yes   No

A dialog box pops up asking you whether you want to delete the column of dimensions from the template worksheet. Clicking **Yes** will mean that you will be given the option to select a dimensional template whenever you add a new **Worksheet** when using the **Workbook**.
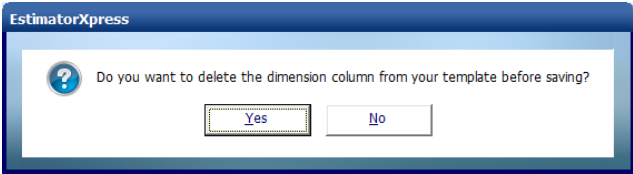
[18] Click **Yes**.

The **Workbook** is permanently locked down. If you wish to make alterations to the **Workbook**, you can copy the **Workbook** in the **Library of Workbooks**.

Well done, you have now created your first **Workbook**! This will now be available for user in all past and future **Estimates**.

Note: If you use this **Workbook** in an **Estimate** that was created before the **Workbook** was, remember to go to **the Price Book** and use the **Synchronise** button to import the new products that the **Workbook** requires into the **Estimate Price Book**. If you forget to do this step you'll get a load of #N/A's where you should have resources.

To stop this Tutorial and close the program:

1. In the **Summary of the Worksheet Template**, press **Close** button to return to the **Library of Workbooks**.

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

3. Press the **Close** button.

CREATING A ROOM DECORATION WORKBOOK

ADDING RESOURCES TO THE PRICE BOOK

5.00 Minutes

This exercise will lead you through manually adding some decorating resources to the **Master Price Book**. Before creating a new **Workbook**, it's a good idea to ensure you have all the necessary material, labour and plant resources in your **Price Book**, as this will help you decide which input options and calculations are required to create the **Workbook**. For the **Room Decoration Workbook** we will start by adding emulsion, primer, undercoat and gloss to the **Price Book**. A **Decorator Labour Resource** already exists in the **Master Price Book**.

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

Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

---

[1]   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.

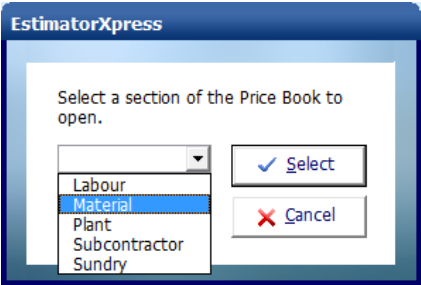[2]   From the **Main Menu,** click on **My Settings.**

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

[4] Click on the **Master Price Book** with your mouse and then press the **Open Price Book** button.
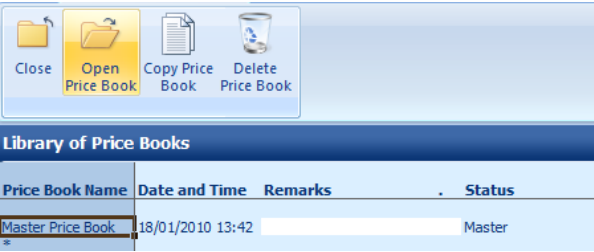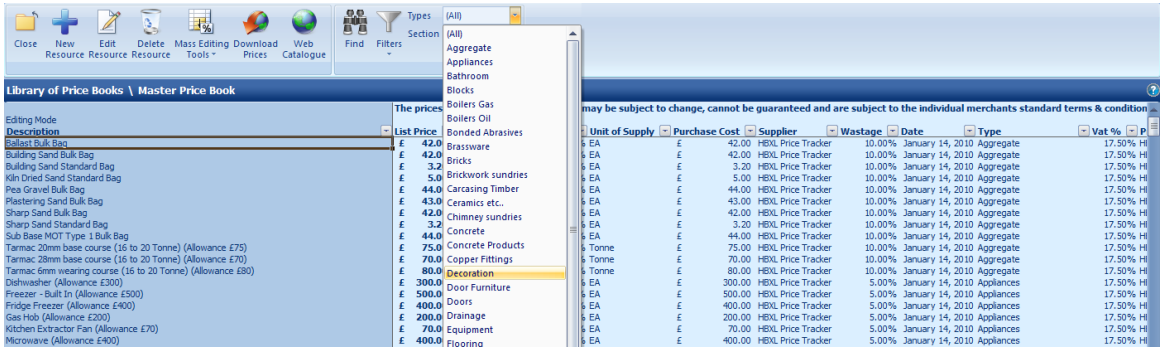

A dialog box pops up asking you which part of the **Price Book** you wish to open. We will start by adding the **Material** resources to the **Price Book**, so we need to open the **Material Section** of the **Price Book**.

[5] Select **Material**.

[6] Click **Select**.

[7]   In the first drop down box on the toolbar (the **Type** drop down box), select **Decoration**.

[8]   Locate an emulsion product and click on it with your mouse.

NOTE: Usually when adding a resource to the **Price Book**, it is helpful to find a resource of the same **Type**, such as **Decoration**, to base your new resource on as it is likely to have similar properties.

[9]   Press **New Resource** button.

[10] Delete the text in the **Description** input box and enter a new **Description** of **Emulsion Magnolia 5L**.

[11] Enter a **Unit Cost** of **15.00**.

[12] Select **Each** from the **Units of Purchase** drop down box.

[13] Select **Provisional** from the **Supplier/Contractor** drop down box.

[14] Select **Decoration** from the **Type** drop down box.

[15] Confirm a **Wastage** percentage of **10**.

[16] Now we have entered all the necessary details for our **Emulsion Magnolia 5L**, click **OK**.

You will see that **Emulsion Magnolia 5L** has been added to the **Price Book** above the material selected to base the resource on.

[17] Now repeat steps [9] to [17] to add each of the following **Materials**:

Description	Unit Cost	Units of Purchase	Supplier	Type	Wastage
Emulsion Brilliant White 5L	£15.00	EA	Provisional	Decoration	10.00
All Purpose Primer 5L	£24.00	EA	Provisional	Decoration	10.00
Multi Surface Undercoat 5L	£24.00	EA	Provisional	Decoration	10.00
Gloss Brilliant White 5L	£25.00	EA	Provisional	Decoration	10.00

1. Now you have added the necessary resources to the **Master Price Book**, to close and save the **Master Price Book**, press **Close** Button. You are transferred back to the **Library of Price Books**.

Close

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

Close

CREATING THE ROOM DECORATION WORKBOOK

40.00 Minutes

Having added the necessary decorating resources to the **Master Price Book**, we are now ready to create the **Room Decoration Workbook**. This exercise will lead you through creating a new **Workbook** from scratch, creating the structure of it by adding rows of dimensions and calculations to the **Dimensions Screen**.

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

1. Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **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.

3. From the **Main Menu**, click on **My Settings**.

---

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

You are transferred to the **Library of Workbooks**. From the **Library of Workbooks**, you can modify master **Workbooks** and create your own **Workbooks**.

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

A dialog box pops up asking you to enter a **Name** and **Template Type** for your new **Workbook**.

[3] Enter **Room Decoration** into the **Workbook Name** input box.

[4] Select **Fitting Out** from the **Template Type** drop down box.

[5] Click **OK**.

You are transferred to the **Summary** of the **Room Decoration Workbook Template**. From here you can create, and subsequently reopen to edit the **Worksheet Template** of the **Room Decoration Workbook** using the **Create Worksheet Template** button. In addition, when you have finished creating the **Worksheet Template**, you can use the **Save Worksheet Template** button to lock down the **Workbook**.

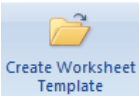[6] Press **Create Worksheet Template** to open the **Worksheet Template** of the **Room Decoration Workbook**.

You are transferred to the **Dimensions Section** of the **Worksheet Template**.

As you can see, the **Dimensions Section of the Worksheet** is blank and contains no data. The screen is split into three sections: **Description**, **Dimension Calculations** and **Resources**.

In order to create the structure of the **Room Decoration Workbook**, it is first necessary to enter descriptions for dimensions and other input options, followed by intermediate dimension calculations to help build up the estimate and resource calculations.

Before entering any information, consider the elements we need to estimate our room decoration. The materials required are likely to be emulsion for walls and ceiling and primer, undercoat and gloss for the skirting boards. Labour is required to prepare and decorate the walls, ceiling and skirting boards.

To estimate this we need to input the dimensions and other fields needed to calculate the amount of resources to be used.

To calculate the cost of decorating the walls, we need to know the wall area which we can calculate if we provide the perimeter and height of the wall, together with door and window areas and reveal depths. We can use the perimeter of the room to calculate the length of skirting board decoration required. In order to create a flexible estimator we will make decorating ceilings and walls, and priming, undercoating and decorating skirting boards optional tasks, as we may or may not need to do these tasks on every job we do. To accomplish all these aspects of decoration we need to input rows under the **Description** section of the screen.

We can add a row to calculate the area under the **Dimension Calculations** section of the screen, using Excel formulas.

Finally, we then calculate the quantities of **Resources**, such as decoration to wall and ceiling areas, and length of skirting boards required, under the **Resources** section of the screen.

We will start by adding rows with dimension and input options to the top section of the screen, under **Description**.

[7]   Click on the asterisk (*) under **Description**.

[8]   Press **Add Row** button.

A dialog box pops up.

[9]   Enter **Perimeter of walls** into the **Description** input box.

[10]   Select **M** from the **Units** drop down box.

[11]   Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**.

A new row called **Perimeter of walls** has been added under **Description**.

We will now create a **Tech Tip** for **Perimeter of walls**.

[12] Highlight the cell which says **Perimeter of walls**.

[13] Press the **Edit Tech Tip** button.
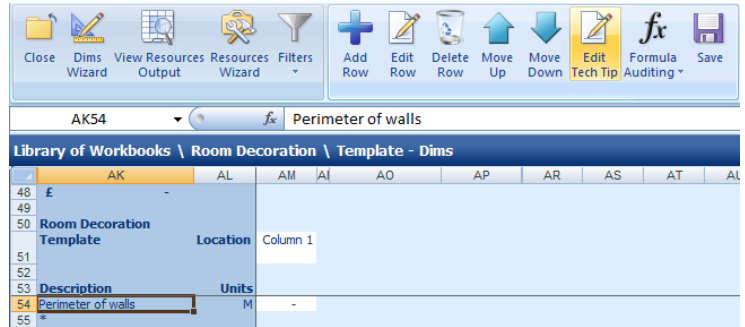
The **Edit Tech Tip** dialog box pops up.

[14] Type into the cell **Enter the total perimeter of walls in metres**.

[15] Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**.
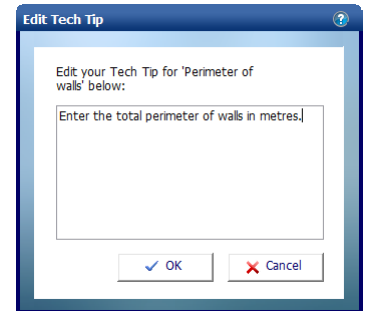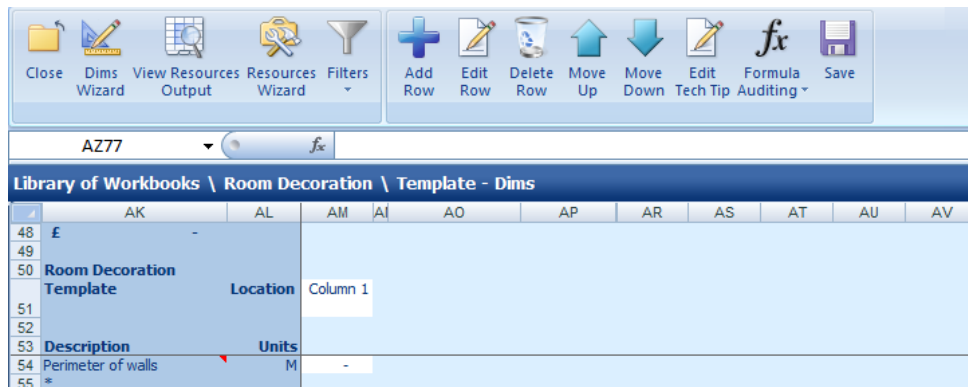
NOTE: A red triangle has appeared in the corner of the Perimeter of walls cell. If you hold your mouse over the triangle (but don't click it), the **Tech Tip** will pop up.

[16] Repeat steps [8] to [16] to add rows and **Tech Tips** for each of the remaining **Descriptions** in the following table:

TIP: You can create blank rows by pressing the **Blank** button in the **Add Row** dialog box. You can also edit or delete rows at any time using the **Edit Row** and **Delete Row** buttons. Take care to add the Blank Rows as detailed below, as this will affect the formulas we add later.

NOTE: It is essential that all of the rows, including blank rows, are added in identical positions in order for the following instructions and formulas to apply. Please take a moment to check your rows are in the correct position.

| Description	Units	Tech Tip
Height of wall	M	Enter the height of the wall from floor to ceiling in metres.
BLANK ROW		
Number of internal doors	No.	Enter the number of internal doors.
Height of internal doors	M	Enter the typical height of the internal doors in metres.
Width of internal doors	M	Enter the typical width of the internal doors in metres.
Depth of reveal to internal door	M	Enter the depth of the reveal to the internal doors in metres.
BLANK ROW		
Number of windows	No.	Enter the number of windows.
Height of windows	M	Enter the typical height of the windows in metres.
Width of windows	M	Enter the typical width of the windows in metres.
Depth of reveal to window	M	Enter the depth of the reveal to the windows in metres.
BLANK ROW		
Number of external doors	No.	Enter the number of external doors.
Height of external doors	M	Enter the typical height of the external doors in metres.
Width of external doors	M	Enter the typical width of the external doors in metres.
Depth of reveal to external door	M	Enter the depth of the reveal to the external doors in metres.
BLANK ROW		
Length of ceiling	M	Enter the length of the ceiling in metres.
Width of ceiling	M	Enter the width of the ceiling in metres.
Other areas of ceiling	M2	Enter any additional irregular areas of ceiling in square metres.
BLANK ROW		
Are ceilings to be decorated?	Y/N	If the ceilings are to be decorated, enter Y. Otherwise, enter N.
Number of coats of decoration to ceiling	No.	Enter the number of coats of decoration to ceiling required.
BLANK ROW		
Are walls to be decorated?	Y/N	If the walls are to be decorated, enter Y. Otherwise, enter N.
Number of coats of decoration to walls	No.	Enter the number of coats of decoration to walls required.
BLANK ROW		
Are skirting boards to be primed?	Y/N	If the skirting boards are to be primed, enter Y. Otherwise, enter N.
Are skirting boards to be undercoated?	Y/N	If the skirting boards are to be undercoated, enter Y. Otherwise, enter N.
Are skirting boards to be decorated?	Y/N	If the skirting boards are to be decorated, enter Y. Otherwise, enter N.
Number of coats of decoration to skirting boards	No.	Enter the number of coats of decoration to skirting boards required.

Your screen should now look like this:

Library of Workbooks \ Room Decoration \ Template - Dims

	AK	AL	AM	AI	AO	AP	AR	AS
48	£	-						
49								
50	**Room Decoration**							
	Template	**Location**	Column 1					
51								
52								
53	**Description**	**Units**						
54	Perimeter of walls	M	-					
55	Height of wall	M	-					
56								
57	Number of internal doors	No.	-					
58	Height of internal doors	M	-					
59	Width of internal doors	M	-					
60	Depth of internal doors	M	-					
61								
62	Number of windows	No.	-					
63	Height of windows	M	-					
64	Width of windows	M	-					
65	Depth of reveal to window	M	-					
66								
67	Number of external doors	No.	-					
68	Height of external doors	M	-					
69	Width of external doors	M	-					
70	Depth of reveal to external door	M	-					
71								
72	Length of ceiling	M	-					
73	Width of ceiling	M	-					
74	Other areas of ceiling	M2	-					
75								
76	Are ceilings to be decorated?	Y/N	-					
77	Number of coats of decoration to ceiling	No.	-					
78								
79	Are walls to be decorated?	Y/N	-					
80	Number of coats of decoration to walls	No.	-					
81								
82	Are skirting boards to be primed?	Y/N	-					
83	Are skirting boards to be undercoated?	Y/N	-					
84	Are skirting boards to be decorated?	Y/N	-					
85	Number of coats of decoration to skirting boards	No.	-					
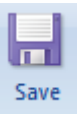
[18] Press **Save** button to save all the rows you have added.

It is helpful when creating a **Worksheet Template**, to enter dummy data into the cells. This makes it easier to check that formulas are correct when entering calculations. Enter the following data into the white column adjacent to the **Descriptions**:

Description	Data
Perimeter of walls	10
Height of wall	2.5
Number of internal doors	2
Height of internal doors	2
Width of internal doors	1
Depth of reveal to internal door	0.05
Number of windows	2
Height of windows	1.2
Width of windows	1.8
Depth of reveal to window	0.15
Number of external doors	2
Height of external doors	2.1
Width of external doors	1
Depth of reveal to external door	0.15
Length of ceiling	3
Width of ceiling	4
Other areas of ceiling	1
Are ceilings to be decorated?	Y
Number of coats of decoration to ceiling	1
Are walls to be decorated?	Y
Number of coats of decoration to walls	2
Are skirting boards to be primed?	Y
Are skirting boards to be undercoated?	Y
Are skirting boards to be decorated?	Y
Number of coats of decoration to skirting boards	1

Your screen should now look like this:

Next we will enter intermediate calculations which will calculate the area of the walls and ceiling and the length of skirting boards. To do this, we can add rows under the **Dimension Calculations** section of the screen. First, we will enter formulas to calculate the area of walls, using a standard Excel formula. To calculate the gross area of walls we need to multiply the **Perimeter of walls** by the **Height of wall**.

[19] Click on the asterisk (*) under **Dimension Calculations**.

[20] Press the **Add Row** button.

The Add Row dialog box pops up.

[21] Enter **Area of walls** into the **Description** input box.

[22] Select **M2** (metre squared) from the **Units** drop down box.

[23] Click **OK**.

A new row called **Area of walls** will have been added under **Dimension Calculations**.

[24] On the row you have just added, click on the white cell adjacent to **Area of walls**.

[25] Type **=** into the cell.

[26] Click on the white cell adjacent to **Perimeter of walls**.

[27] Type * (this is the Excel symbol for multiplied by).

[28] Click on the white cell adjacent to **Height of wall**.

You will see that the cell references of the cells you have clicked on have been added to the formula.

The formula should now look like this:

=AM54*AM55

[29] Press the **Enter** key on your keyboard.

The software will automatically calculate the gross area of the walls, but we need to know wall areas plus reveal areas, less door and window areas. We need to add some interim calculations to work out the door and window areas and reveal areas.

[30] Click on the asterisk (*) under **Dimension Calculations**.

[31] Press the **Add Row** button.

[32] Click on the asterisk (*) under **Dimension Calculations**.

Add Row

[33] Press the **Add Row** button.

[34] Enter **Area of internal doors** into the **Description** input box.

[35] Select **M2** (metre squared) from the **Units** drop down box.

[36] Click **OK**.

A new row called **Area of internal doors** will have been added under **Dimension Calculations**.

EstimatorXpress

Enter a Name for this Dimensional Calculation.

Description: Area of internal doors

Units: M2

☑ Format input as a number

✓ OK   ✗ Cancel

Now we are going to enter the formula to calculate the area of internal doors. To calculate the area of internal doors we need to multiply the **Number of internal doors** by the **Height of internal doors** by the **Width of internal doors**.

[37] On the row you have just added, click on the white cell adjacent to **Area of internal doors**.

[38] Type **=** into the cell.

[39] Click on the white cell adjacent to **Number of internal doors**.

IF   × ✓ fx =AM57

Library of Workbooks \ Room Decoration \ Template - Din

	AK	AL	AM	
48	£	-		
49				
50	**Room Decoration Template**	Location	Column 1	Y/N	y
51				No.	1.000
52					
53	**Description**	Units		Y/N	y
54	Perimeter of walls	M	10.000	No.	2.000
55	Height of wall	M	2.500		
56				Y/N	y
57	Number of internal doors	No.	2.000	Y/N	y
84	Are skirting boards to be decorated?			Y/N	y
85	Number of coats of decoration to skirting boards			No.	1.000
86	*				
87					
88	**Dimension Calculations**	Units			
89	Area of walls	M2	25.000		
90	Area of internal doors	M2	=AM57		

IF	▼ ◎ ✗ ✓ ƒx	=AM57*AM58

Library of Workbooks \ Room Decoration \ Template - Dim

	AK	AL	AM
48	£	-	
49			
50	**Room Decoration Template**	**Location**	Column 1
51			Y/N y
52			No. 1.000
53	**Description**	**Units**	
54	Perimeter of walls	M	10.000 Y/N y
55	Height of wall	M	2.500 No. 2.000
56			
57	Number of internal doors	No.	2.000 Y/N y
58	Height of internal doors	M	2.000 Y/N y
84	Are skirting boards to be decorated?		Y/N y
85	Number of coats of decoration to skirting boards		No. 1.000
86	*		
87			
88	**Dimension Calculations**	**Units**	
89	Area of walls	M2	25.000
90	Area of internal doors	M2	=AM57*
91	*		AM58

[40] Type * (this is the Excel symbol for multiply).

[41] Click on the white cell adjacent to **Height of internal doors**.

[42] Type * (this is the Excel symbol for multiply).

[43] Click on the white cell adjacent to **Width of internal doors**.

IF	▼ ◎ ✗ ✓ ƒx	=AM57*AM58*AM59

Library of Workbooks \ Room Decoration \ Template - Dim

	AK	AL	AM
48	£	-	
49			
50	**Room Decoration Template**	**Location**	Column 1
51			Y/N y
52			No. 1.000
53	**Description**	**Units**	
54	Perimeter of walls	M	10.000 Y/N y
55	Height of wall	M	2.500 No. 2.000
56			
57	Number of internal doors	No.	2.000 Y/N y
58	Height of internal doors	M	2.000 Y/N y
59	Width of internal doors	M	1.000 Y/N y
85	Number of coats of decoration to skirting boards		No. 1.000
86	*		
87			
88	**Dimension Calculations**	**Units**	
89	Area of walls	M2	25.000
90	Area of internal doors	M2	=AM57*
91	*		AM58*
92			AM59

You will see that the cell references of the cells you have clicked on have been added to the formula.

The formula should now look like this:

=AM57*AM58*AM59

[44] Press the **Enter** key on your keyboard.

Now have a go at entering the remaining formulas yourself.

[45] Repeats steps [30] to [44] to create the following rows and formulas as shown in the table below.

We need to calculate the window and external door areas in the same way as we calculated the internal door area.   We will then subtract the internal door, window and external door areas from the gross wall area. Then we will calculate the reveal areas of the internal doors, windows and external doors and add these to the wall area. The final wall area will be called area of walls including reveals.

We will calculate the ceiling area by multiplying the length by the width of the ceiling and adding any other areas. The length of skirting board is equal to the perimeter of the room.

* These formulas will only be correct if you add the rows in this order, entering each formula immediately after adding the row. This is because EstimatorXpress® is inserting rows automatically in other parts of the Worksheet.

Dimension Calculation	Units	Formula*
Area of windows	M2	=AM62*AM63*AM64
Area of external doors	M2	=AM67*AM68*AM69
Net area of walls	M2	=AM89-AM90-AM91-AM92
Area of reveals to internal doors	M2	=AM57*((2*AM58)+AM59)*AM60
Area of reveals to windows	M2	=AM62*((2*AM63)+AM64)*AM65
Area of reveals to external doors	M2	=AM67*((2*AM68)+AM69)*AM70
Area of walls including reveals	M2	=AM93+AM94+AM95+AM96
Area of ceiling	M2	=AM72*AM73+AM74
Length of skirtings	M	=AM54-(AM57*AM59)- (AM67*AM69)

Your screen should now look like this:

88	**Dimension Calculations**	**Units**		
89	Area of walls	M2	25.000	25.000
90	Area of internal doors	M2	4.000	4.000
91	Area of windows	M2	4.320	4.320
92	Area of external doors	M2	4.200	4.200
93	Net area of walls	M2	12.480	12.480
94	Area of reveals to internal doors	M2	0.500	0.500
95	Area of reveals to windows	M2	1.260	1.260
96	Area of reveals to external doors	M2	1.560	1.560
97	Area of walls including reveals	M2	15.800	15.800
98	Area of ceiling	M2	13.000	13.000
99	Length of skirtings	M	6.000	6.000
100	*			

[46] Press the **Save** button.

Now we have finished adding all our intermediate calculations to help calculate our resources, we need to add rows to calculate the quantity of resources required.

[47] Click on the asterisk (*) under **Resources**.

[48] Press the **Add Row** button.

A dialog box pops up.

[49] Enter **Decoration to wall or plaster** into the **Description** input box.

NOTE: The **Description** you enter here will appear in the **Item used for column** in the **View Resources Output** area.

[50] Select **M2** from the **Units** drop down box.

[51] Select **Material** from the **Resource Section** drop down box.

[52] Select **Internal Decoration** from the **Build Phase** drop down box.

[53] Click **OK**.

You are returned to the **Dimensions Section** of the **Worksheet Template**.

A new row called **Decoration to wall or plaster** has been added under **Resources**.

Earlier, we entered a Y/N question of **Are walls to be decorated?** The calculation for **Decoration to wall or plaster** is dependent on whether this cell is set to Y or N so we need to enter an IF formula which does calculations based on whether the **Are walls to be decorated?** cell is set to Y or N.

[54] On the row you have just added, click on the white cell adjacent to **Decoration to wall or plaster**.

[55] Type **=** into the cell.

[56] Just under the Menu, click where is says **fx**.

[57] Select **IF** from the scroll menu.

[58] Click **OK**.

NOTE: For more information on inputting formulas into spreadsheets, go to the Formula Auditing drop down menu and select Formula Help. Here you will find advice on the different types of formula available and how to use them.

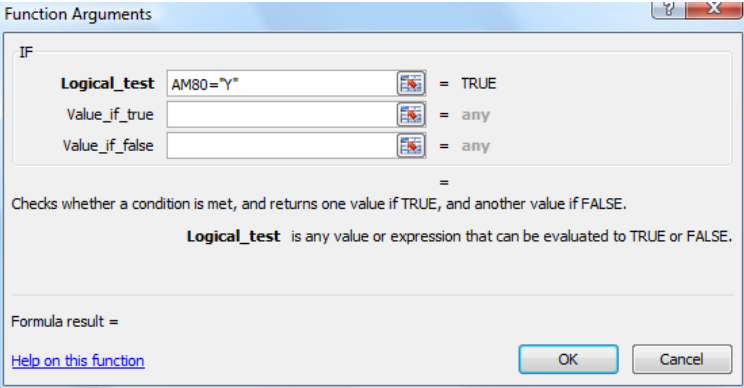The Functions Arguments dialog box pops up.

[59] Click your mouse on the Logical_test input box.

[60] Click on the white cell adjacent to **Are walls to be decorated?** on the **Dimensions Screen**.
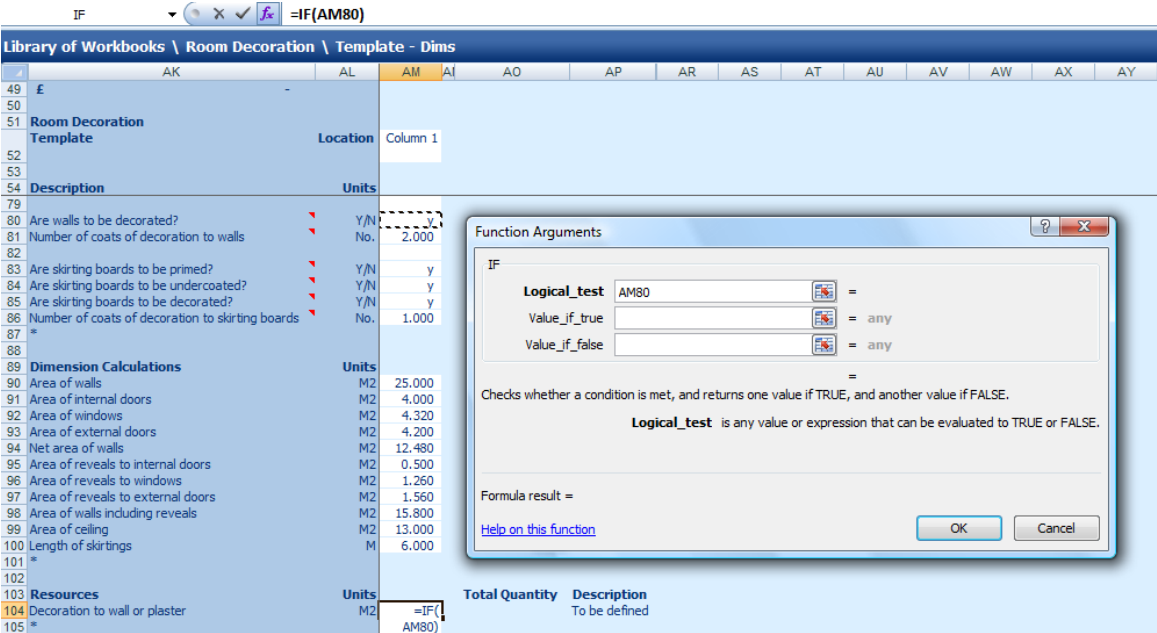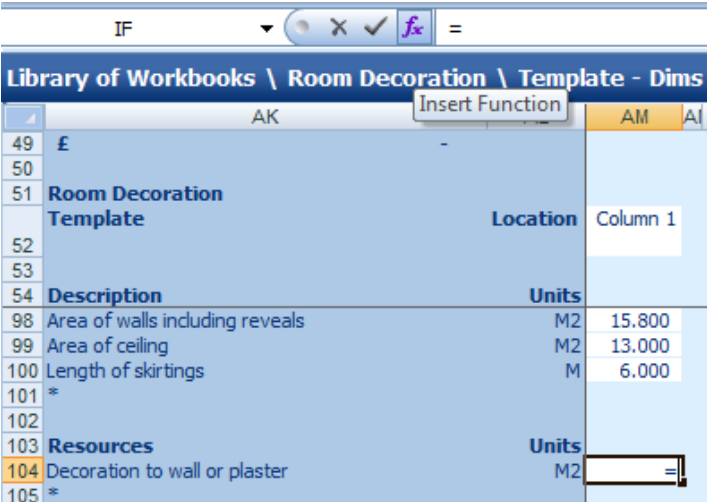
[61] Type **= "Y"** on your keyboard, as shown on the image to the right. (Don't forget to add the quotation marks either side of the Y).

[62] Click your mouse on the Value_if_true input box.

[63] Click on the white cell adjacent to **Area of walls including reveals**.

[64] Type ***** (this is the Excel symbol for multiplied by) on your keyboard.

[65] Click on the white cell adjacent to **Number of coats of decoration to walls**.

This means that if the **Are walls to be decorated?** row is set to Y, EstimatorXpress® will calculate the area of wall to be decorated, based on the area calculated in the **Area of walls including reveals** multiplied by the number of coats of decoration.
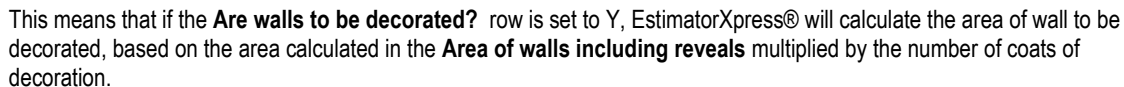
[66] Click your mouse on the Value_if_false input box.

[67] Type **0** into the input box.

This means that if the **Are walls to be decorated?** row is not set to Y (i.e. set to N), EstimatorXpress® will automatically set the quantity of decoration to wall or plaster to 0.

[68] Click **OK**.
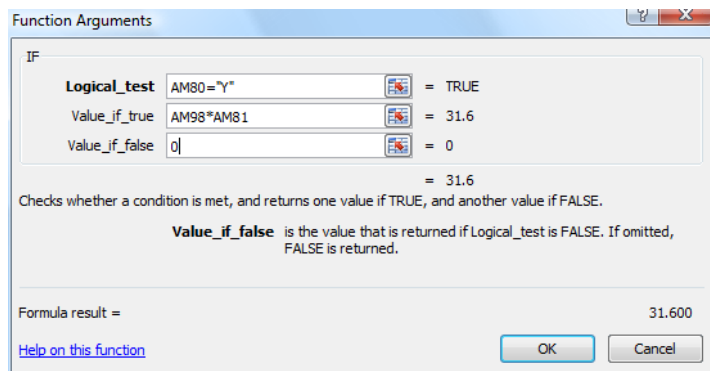
NOTE: For more information on inputting formulas into spreadsheets, go to the Formula Auditing menu bar and select Formula Help. Here you will find advice on the different types of formula available and how to use them.

The formula should now look like this:

=IF(AM80="Y",AM98*AM81,0)

As we have entered a Y into the cell, the formula has calculated that we need 31.6m^2 of decoration for the walls.

[69] Repeat steps [47] to [68] to add Rows and formulas for the Resources in the chart below. Previously when creating the **Laminate Flooring Workbook** we added all of the material items and then all of the labour items. This time we are adding each material followed by its associated labour. Both of these approaches to adding resources are appropriate – when creating your own **Workbooks**, do whichever feels most logical to you.

NOTE: These formulas will only be correct if you add the rows in this order, entering each formula immediately after adding the row. This is because EstimatorXpress® is inserting rows automatically in other parts of the worksheet.

Description	Units	Resource Section	Build Phase	Formula
Prepare wall for decoration	M2	Labour	Internal Decoration	=AM105
Apply decoration to walls	M2	Labour	Internal Decoration	=AM107
Decoration to ceiling	M2	Material	Internal Decoration	=IF(AM80="Y",AM102*AM81,0)
Prepare ceiling for decoration	M2	Labour	Internal Decoration	=AM111
Apply decoration to ceiling	M2	Labour	Internal Decoration	=AM113
Primer for skirting boards	M	Material	Internal Decoration	=IF(AM89="Y",AM106,0)
Undercoat for skirting boards	M	Material	Internal Decoration	=IF(AM91="Y",AM107,0)
Decoration for skirting boards	M	Material	Internal Decoration	=IF(AM93="Y",AM108,0)
Prepare skirting boards for decoration†	M	Labour	Internal Decoration	=IF(OR(AM92="Y", AM93="Y", AM94="Y"),AM109,0)
Apply primer to skirting boards	M	Labour	Internal Decoration	=AM120
Apply undercoat to skirting boards	M	Labour	Internal Decoration	=AM122
Apply decoration to skirting boards	M	Labour	Internal Decoration	=AM124

† When entering the formula for this item, select the IF formula option and enter **OR(AM92="Y", AM93="Y", AM94="Y")** into the Logical_test input box, **AM109** into the Value_if_true input box and **0** into the Value_if_false input box.

Once complete, cast your eye over the figures to check the formulas are correctly calculating the resources using the dummy data. Try entering alternative information, including Y or N, into the appropriate cells and check the answers manually. Once you are satisfied that all is working correctly, reset the input values to the original values.

NOTE: Don't worry if the formulas you entered first seem to have changed from the formulas in the chart above. This is because EstimatorXpress® is automatically inserting rows in other parts of the worksheet and is automatically adjusting the formulas as necessary.

The **Resources Section** of the **Dimensions Screen** should now look like this:

	Resources	Units		Total Quantity	Description
115					
116	Decoration to wall or plaster	M2	31.600	31.600	To be defined
117	Prepare wall for decoration	M2	31.600	31.600	To be defined
118	Apply decoration to walls	M2	31.600	31.600	To be defined
119	Decoration to ceiling	M2	13.000	13.000	To be defined
120	Prepare ceiling for decoration	M2	13.000	13.000	To be defined
121	Apply decoration to ceiling	M2	13.000	13.000	To be defined
122	Primer for skirting boards	M	6.000	6.000	To be defined
123	Undercoat for skirting boards	M	6.000	6.000	To be defined
124	Decoration for skirting boards	M	6.000	6.000	To be defined
125	Prepare skirting boards for decoration	M	6.000	6.000	To be defined
126	Apply primer to skirting boards	M	6.000	6.000	To be defined
127	Apply undercoat to skirting boards	M	6.000	6.000	To be defined
128	Apply decoration to skirting boards	M	6.000	6.000	To be defined

[70] Press **Save** button.

Well done! You've finished entering all of the calculations required to do the estimating of the room decoration. We are now going to turn our attention to specifying our resources.

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

1. If you wish to continue creating the **Room Decoration Workbook**, turn to the next page. If you wish to stop at this point, press **Close** Button. You are transferred back to the **Summary of the Worksheet Template**.

2. In the **Summary of the Worksheet Template**, press **Close** button to return to the **Library of Workbooks**.

3. In the **Library of Workbooks**, press **Close** button to return to the **My Settings Menu**.

SPECIFYING RESOURCES IN THE WORKBOOK

10.00 Minutes
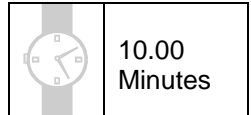
This exercise will talk you through setting up default resources in the **Room Decoration Workbook**, specifying the material and labour resources we added to the **Master Price Book** earlier.
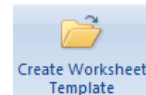

If you wish to start this exercise having closed EstimatorXpress®:

1. Launch **EstimatorXpress®** by double-clicking on the **EstimatorXpress®** icon on your desktop or selecting **EstimatorXpress®** from the Start, Programs Menu.

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.

2. From the **Main Menu**, click on **My Settings**.

3. From the **My Settings Menu**, click on the **My Workbooks** button.

4. Locate and click on the **Room Decoration Workbook** in the **Library of Workbooks**.

5. Press the **Open Workbook** button.

6. Press the **Create Worksheet Template** button.

You are now in the **Dimensions Screen** of the **Room Decoration Workbook**.

[1]   Press the **View Resources Output** button.

You are transferred to the **Resources Section** of the **Worksheet**. From here you can specify the resources you wish to use in your **Workbook**.

Currently, all resources are set as **To be defined**. We will now specify the **Materials** we are going to use, by selecting the **Materials** we added to the **Price Book**.

[2]   Click on the resource called **Decoration to wall or plaster** in the **Item used for column**.

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

Library of Workbooks \ Room Decoration \ Template - Dims \ Template - Resources

No. of Groups of Items	1.00	
Total Cost of Groups	£ -	
Customisation Mode		

| Item used for:	Description	Purchase Unit	Purchase Cost	Build Phase	Production/ Usage Factor	Estimate Rate	Unit
Decoration to wall or plaster	To be defined	Unit £	-	Internal Decoration	1.00000	£ -	M2
Prepare wall for decoration	To be defined	Unit £	-	Internal Decoration	1.00000	£ -	M2
Apply decoration to walls	To be defined	Unit £	-	Internal Decoration	1.00000	£ -	M2

Now we need to locate the decorating material we added to the **Price Book** earlier.

[4]   Press the **Find** button.

The **Find** dialog box pops up.

[5]   Type "emulsion" into the drop down box.

[6]   Click **Find** until you locate the material called **Emulsion Magnolia 5L**.

[7]   Click **Cancel** to close the **Find** dialog.
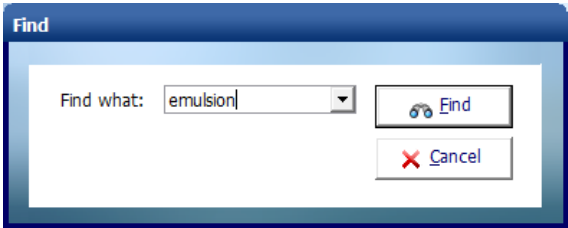
[8]   Press the **Select Resource** button.
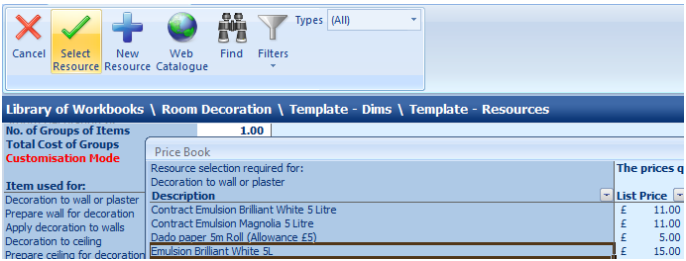
You are transferred back to the **Resources Section** of the **Workbook** where the **Edit Resource** dialog box is open.

As we know we can get about 55m^2 coverage from a 5L can of emulsion.

We can use the **Usage Factor Calculator** to work out how much of this 5L can we use per M.

NOTE: The **Usage Factor** is the proportion of the **Purchase Unit** required to do a **Usage Unit**.

[9]   Press the **Calculator** button.

The Usage Factor Calculator pops up.

Enter 55 in the box for the area of 'Decoration to wall or plaster' that 1 can will cover.

[10] Press **Ok**.

In the top right hand corner of the dialog box, the quantity cell tells us we need 31.6 **Usage Units** (metres squared) of emulsion for this job.

[11] We are happy with the all the other details, so click **OK**.

You will see that EstimatorXpress® has automatically calculated the costs and wastage associated with the decoration to plaster or walls.

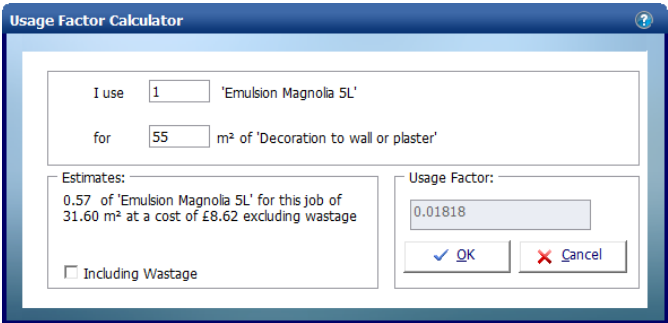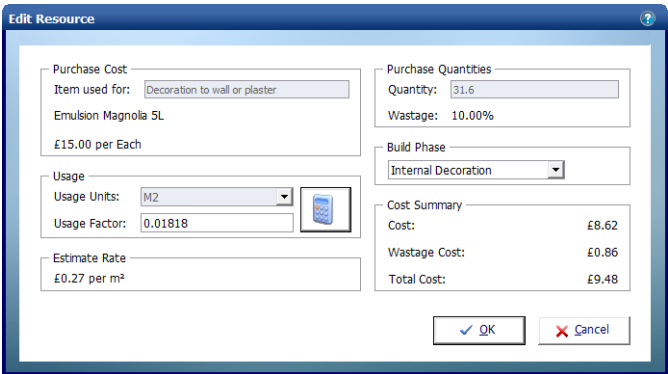[12] Repeat steps [2] to [11] to specify the remaining **Material Resources**, as per the following table, remembering to click on the relevant **Item Used For**.

Item Used For	Resource to Select from Price Book	Usage Factor
Decoration to ceiling	Emulsion Brilliant White 5L	0.018
Primer for skirting boards	All Purpose Primer 5L	0.003
Undercoat for skirting boards	Multi Surface Undercoat 5L	0.003
Decoration for skirting boards	Gloss Brilliant White 5L	0.003

We will now specify the **Labour Resources** we are going to use, by selecting the **Decorator** from the **Master Price Book**.

[13] Click on the resource called **Prepare wall for decoration** in the **Item used for column**.

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

Now we need to locate the **Decorator** labour resource.

[15] Scroll down the **Price Book** until you find the Decorator.

Highlight the **Decorator** by clicking on it with your mouse.

[16] Press the **Select Resource** button.

You are transferred back to the **Resources Section of the Workbook** where the **Edit Resource** dialog box is open.

[17] Click on the white cell adjacent to **Usage Factor** and delete its contents.

[18] Type in **0.033**.

[19] We are happy with all the other details, so click **OK**.

Edit Resource

Purchase Cost
Item used for: Prepare wall for decoration
Decorator
£15.00 per Hours

Usage
Usage Units: M2
Usage Factor: 0.033

Estimate Rate
£0.50 per m²

Purchase Quantities
Quantity: 31.6
Wastage: 0.00%

Build Phase
Internal Decoration

Cost Summary
Cost: £15.64
Wastage Cost: £0.00
Total Cost: £15.64

✓ OK   ✗ Cancel

[20] Repeat steps [13] to [19] to specify the remaining **Labour Resources**, as per the table below, remembering to click on the relevant **Item Used For**.

Item Used For	Resource to Select from Price Book	Usage Factor
Apply decoration to walls	Decorator	0.055
Prepare ceiling for decoration	Decorator	0.033
Apply decoration to ceiling	Decorator	0.055
Prepare skirting boards for decoration	Decorator	0.03
Apply primer to skirting boards	Decorator	0.03
Apply undercoat to skirting boards	Decorator	0.03
Apply decoration to skirting boards	Decorator	0.03

After specifying all the **Resources**, your **Resources Output** screen should now look like this:

Back | Change Resource | Edit Resource | Markers | Views | Add Resources | Resources Wizard

Library of Workbooks \ Room Decoration \ Template - Dims \ Template - Resources

No. of Groups of Items		1.00				
Total Cost of Groups	£	84.34				
Customisation Mode						
			Purchase	Purchase	Build	Production/
Item used for:	Description		Unit	Cost	Phase	Usage Factor
Decoration to wall or plaster	Emulsion Brilliant White 5L		EA £	15.00	Internal Decoration	0.01800
Prepare wall for decoration	Decorator		Hours £	15.00	Internal Decoration	0.03300
Apply decoration to walls	Decorator		Hours £	15.00	Internal Decoration	0.05500
Decoration to ceiling	Emulsion Brilliant White 5L		EA £	15.00	Internal Decoration	0.01800
Prepare ceiling for decoration	Decorator		Hours £	15.00	Internal Decoration	0.03300
Apply decoration to ceiling	Decorator		Hours £	15.00	Internal Decoration	0.05500
Primer for skirting boards	All Purpose Primer 5 L		EA £	24.00	Internal Decoration	0.00300
Undercoat for skirting boards	Multi Surface Undercoat 5L		EA £	24.00	Internal Decoration	0.00300
Decoration for skirting boards	Gloss Brilliant White 5 Litre		EA £	24.00	Internal Decoration	0.00300
Prepare skirting boards for decoration	Decorator		Hours £	15.00	Internal Decoration	0.03000
Apply primer to skirting boards	Decorator		Hours £	15.00	Internal Decoration	0.03000
Apply undercoat to skirting boards	Decorator		Hours £	15.00	Internal Decoration	0.03000
Apply decoration to skirting boards	Decorator		Hours £	15.00	Internal Decoration	0.03000
*						

We have now finished creating our **Room Decoration Workbook** and are ready to lock down the **Workbook**. Locking a **Workbook** means you can no longer make changes to the rows and formulas within the **Workbook**.
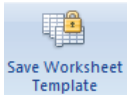
[21] Press the **Back** button to return to the **Dimensions Section** of the **Worksheet**.

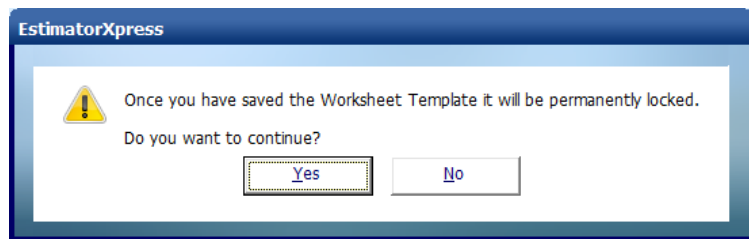[22] Press the **Close** button to close the **Worksheet Template**.

You are returned to the **Summary of the Worksheet Template**.

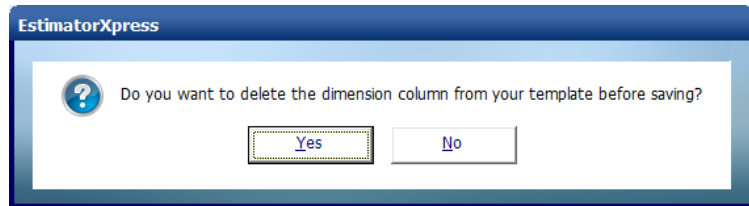[23] Press the **Save Worksheet Template** button.

A dialog box pops up asking if you are sure you wish to lock down the **Worksheet Template**.

[24] Click **Yes** if you are happy that you have finished work on the **Workbook**.

EstimatorXpress

⚠ Once you have saved the Worksheet Template it will be permanently locked.

Do you want to continue?

Yes   No

A dialog box pops up asking you whether you want to delete the column of dimensions you entered to test the formulas were correct.

[25] Click **Yes**.

EstimatorXpress

❓ Do you want to delete the dimension column from your template before saving?

Yes   No

The **Workbook** is permanently locked down. If you wish to make alterations to the **Workbook**, you can copy the **Workbook** in the **Library of Workbooks**. The new copy of the **Workbook** will be unlocked and can be edited in the same way as described above. This is a very useful feature when you want to create a similar **Workbook**. For example, a **Wallpapering Workbook** could easily be created by adapting the **Room Decoration Workbook**, retaining some of the original values and formulas.

1. In the **Summary of the Worksheet Template**, press the **Close** button to return to the **Library of Workbooks**.

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