

Section 7

7.1 Estimate - Tender Number

To take out a tender number click the **“New”** button (the program finds the last number and adds 1). **“Tab”** and enter information in the field entry descriptions displayed on the window below. Each tender number is unique and can be put into five (5) different departments A, B, C, D & E and be given department names if required. (See ‘Server Preferences’ under ‘Special’ in drop down menu).

Est No	Dep	External Est No	Estimate Description	Closing Date	Estimated By	Active	Date Time of Front Sheet
153	A		Trial for estimate datafile			YES	8 JUN 2011 15:15:05
150	A		Demo Estimate - Re wire city of Atlantis	25 DEC 2002	Chris Hughes	YES	18 NOV 2005 18:00:0
151	A	724	House Rewiring	31 MAR 2011	Jin	YES	3 OCT 2011 11:29:02
152	A	1234	First Estimate	1 OCT 2011		YES	3 OCT 2011 11:17:27

Press the **“Enter”** key or click **“OK”** to finish entering information. To change or amend information, click the **“Edit”** button. This information will be written to the C:\ drive, to the data file Estimate.df1 and then to data file Term 3.df1.

If the system is networked the information is written to the Server Computer hard disc drive shared data file Estimate.df1, all in the same process.

It is advisable to enter Descriptions, Closing Dates, Starting and Finishing Dates, and to keep the information up to date whilst the Estimate is active, as the information may be required at a later date.

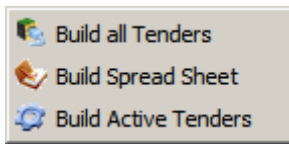
The date received will automatically insert from the computers system date. The Estimator's Name, hourly rate and material mark up percentage can be overwritten if required.

When the tender number is entered for the first time it sets the estimate number to **“Active”**, providing a view of current active estimates only. When the **“Active”** box is unchecked, the estimate is deactivated.

Note: Estimate workings are not deleted or lost when deactivated and can be reactivated at any time. It is important to deactivate estimates when not in use to keep the system tidy.

Build up Menu

This menu can be found by right clicking in the table at the bottom of the window.



Build All Tenders

To find all current activated and deactivated Estimates right click inside the bottom half of the screen in the Estimate Description screen and click on 'Build All Tenders'.

Build Spread sheet

To prepare a Spread sheet of the Estimates right click inside the bottom half of the screen in the Estimate Description screen and click on 'Build Spread sheet' and an Excel Spread sheet will be automatically generated.

Build Active Tenders

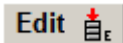
To find all current activated estimates right click inside the bottom half of the screen in the Estimate Description screen and click on 'Build Active Tenders'.

Hourly Rate and Material Mark Up %

The Hourly Rate and Material Mark Up % are inserted as pre-set rates and are stored in the Server Preferences (Refer to under Special Menu Heading). The rates are intended as a guide to give some indication of the size of the project whilst the estimate is in progress.

Hourly Rate and Material Mark Up % can be changed in this window at any time as they are not always decided until final estimate analysis and approval.

If the rates are modified, the program will put the question: **“Do you want to change all the Hourly Rates?”** If **“Yes”**, the program will automatically update all Hourly Rates and Material Mark Up %. When modified in all sections, the **Price Break Up Report** can reflect the changes. If **“No”**, the material mark ups and labour rates are left unchanged allowing individual rates in the sections.

 **Alter Existing Record**

Double click the item to be changed, loading it into the entry fields. Click **“Edit,”** the record is now ready to be changes. Use the **“Tab”** key to move across or click into the field to be changed. When changes are complete click **“OK”**.

 **Cancel the job**

Highlight the incorrect input field, click **“Cancel”** to remove.

 **To Move Up and Down**

The next and previous records are available using these buttons. Click on the arrow to move one line, or the barred arrow to move to the top or bottom of the field.

 **Find**

The **“Find”** button works in two ways, firstly by clicking the **“Binoculars”**, the cursor will start flashing in the Tender Number field. Enter a number then **“OK”**. If the tender number is valid, the information is brought to the forefront, enabling previously deactivated tenders to be reactivated.

Secondly, by performing a right mouse click on the **“Binoculars”**, the cursor will start flashing in a new window entry box. Enter a word then **“OK”**. A search is carried out, matching equivalent words contained in the description and installing them into the active tender list in a highlighted form. (It is important to note that the word search is case sensitive so try upper and lower case words).

Example: To locate a previous Hospital estimate, enter the word Hospital then **“OK”**. The list will be expanded with tenders containing that word, if the relevant tender is not found try typing variations on the word, such as HOSPITAL or hospital etc.

Calculate Rate

To calculate an Hourly Rate some users need to use the **“Front Sheet”**, because their overheads remain constant.

The “Calculated Price” may be \$10,000.00, however, for undefined reasons the submitted price may need to be \$9,500.00. Click the **“Calculate Rate”** button and if the Average Hourly Rate, Material Mark Up %, Estimated Hours and Material fields has values, a temporary field will appear. Enter the new base price, all values will be recalculated, rounded down to 2 decimal places and GST re-evaluated on the new price.

Should lost time and supervision hours be added in the front sheet, these costs are usually spread across the Estimate hours for price break up purposes.

To perform this function the base price is entered and total hours and materials in the estimate will be recalculated. The procedure then deducts from the submitted price, the total of materials, complete with the % mark up. The remainder is divided by the hours and a loaded hourly rate calculated and saved to the hard disc.

Note: If changes are made to the estimate this does not automatically recalculate the new rate.

7.1.1 Front Sheet

The Front Sheet is where all the important financial decisions are made.

Highlight the required Estimate; click the **“Front Sheet”** button to access the front sheet. See detailed operation of this screen below.

Fast Track Estimating System
 File Edit Estimating Maintenance Special Window Help

Front Sheet

Tender Name :- House Rewiring
 Tender No :- 151
 Project Start Date :- 15 MAR 2010
 Project Finish Date :- 15 APR 2010
 Tender Closing Date :- 31 MAR 2011

Line	L/M	Description	Description 2	Quantity	Unit	Price \$	Material \$	Labour \$	Mat CC	Lab CC	Alt CC
6.0	L	Supervisor	=Hrs.15	532.89	Hrs	91.50					
1.0	M	Materials From Estimate	Subcontract \$ 0	1.00	\$	258,903.60	258,903.60				
2.0	L	Total Hours From Estimate		3,552.61	Hrs						
3.0	L	General Electrician	71.91% of Total Hrs	2,554.61	Hrs	61.50		157,108.52			
5.0	M	Utility Truck		3.00	Wks	180.00	540.00				
6.0	L	Supervisor	=Hrs.15	532.89	Hrs	91.50		48,759.44			

Column Totals of Material & Labour \$:- 259,443.60 205,867.96

Subtotal of Material + Labour + = \$:- 465,311.56

Material Markup % :- 10.00 + 25,944.36

Labour Markup % :- 10.00 + 20,586.80

Subtotal Base Price \$:- 511,842.72

GST % :- 10.00 GST \$:- 51,184.27

Subtotal Base Price including GST \$:- 563,026.99

Total of PC Sums \$:-

Total Contingency Sums \$:-

GST Total Project Price \$:- 563,026.99

Weeks Duration :- 4
 Material % :- 50.69
 Labour % :- 40.22
 Profit % :- 9.09

Save Template FS Install Template FS Calculator

Print Delete Insert New Edit OK Cancel Close

The Front Sheet enables the Estimator and Management to combine and attach the commercial structure to the project, entering profit, vehicle cost, site accommodation, communications etc.

The program allows for overhead costs and other sundry items to be applied and distributed over the project. The costs are calculated to show loaded hourly rates and overall material mark up percentage, which are automatically read into the section description.

Operation

Open the “**Estimating**” menu and select “**Tender Number**”. Select the estimate required. The “**Front Sheet**” button will be grey and become active when an estimated is selected. Click “**Front Sheet**” button, a search and re-calculation of the estimate will occur (this may take a few seconds in large estimates).

The accumulated values are added to the top of the list field, Line 1 Material and Line 2 Labour content in hours from the estimate. The values are recalculated every time the window is opened.

When opening this window, **ensure that the estimate is very nearly complete** (possibly containing budget prices for some items).

Information in this window is displayed in the following columns (Fields):

To enter **Site Accommodation** into the “Front Sheet”, e.g. a lunch room costing \$150.00/week to hire for a period of 52 weeks, plus \$400.00 to transport.

Click “**New**” and enter the letter “**M**” in the Labour/Material field. “**Tab**” to the next field, enter “Lunch Room Delivery/Pickup Charge”, “**Tab**” to the unit field and Enter “**Lot**”. “**Tab**”

and enter the "\$400.00" fee into the Price field, click "**OK**" or "**Enter**". The record is now entered to the database.

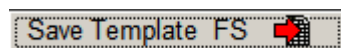
Repeat the above process, typing "Lunch Room Hire", Quantity "**52**", Unit as "**Wks**", and price "\$150.00". This is also added to the database.

To enter **Supervision Allowance** (allowing 144 supervisory hours), repeat the above process entering the letter "**L**", then "Supervision", Quantity "**144**", Unit as "**hrs**" and the hourly rate in dollars. This is also recorded in the database.

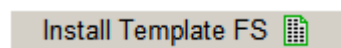
The above information gives a general idea of how to construct your front sheet. The next step is to add some profit. At the bottom of the window there are **Material Mark Up %** and **Labour Mark Up %** fields. Click on these fields to directly enter the % fields mark ups, click "**Ok**" to extend the entries.

Line Number	Differentiates between lines and is allocated when a new line is added. The line number comes from adding 1 to the last number.
Character	This field can have 3 values, L = Labour, M = Material and * = for comment. This determines the column in which the value of information is to be displayed, if "*" is placed in the field, the values are not placed in any column.
Description	The item description.
Description 2	Reinforces or gives more space to the description, also has extra functions (Referred to later).
Quantity	Quantity, for example: - 2 Wks (Weeks)
Rate	Unit, for example: - Weeks, each, Lot etc. Entry of information is not mandatory.
Price	Insert hourly rates here to be converted into dollars, e.g. the base hourly rate for tradesman etc.

Other Features

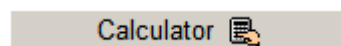


To save the current "**Front Sheet**" to use as a template for future estimates, determine the most commonly used items, enter them without values and save them. You can always add specialised items to tenders when required.



Click on this button to install the template and saved Front Sheet.

CAUTION: The same Front sheet will be reinstalled each time the button is clicked.



Click this button to bring up the standard Windows calculator, if it was installed with your operating system. If the calculator has already been used and is lying below the active

program, a message screen will appear, prompting "Alt + Tab" keyboard function to bring it to the front of the active window.



Comment

Click on this button to open a window so comments on front sheet can be added and stored with the estimate.

If preformatted comment are required such as Quality insurance statements, they can be automatically read in, therefore saving time consuming typing.

This works by placing a text file called "FontSheetCom.txt" adjacent to the "Omnis.exe" file, in the "C:\Program Files\OS33RT" folder.

The process works when the window opens, it then checks to see if the field has been populated already. If not, then a procedure runs opening the above mentioned text file and reads the contents into the window field, and then closes the text file.

When the window is closed the comment is saved.

The comment is then printed out as part of the front sheet reports.

The text file can be constructed in Microsoft "Note Pad or Word Pad" A maximum of 750 Characters can be used for this purpose.



Calculation

This adds the contents together of the selected lines, so quick calculations can be performed.



Prints the Font Sheet as displayed plus comments to Fast Track print. With a right mouse click a Microsoft Excel report is also generated so it can be emailed away for remote approval.



Insert This functions allows for lines to inserted between other existing lines with the exception of reserved lines 1 to 3.9.



Close - Closes out of the Front Sheet window, and in doing so preforms necessary calculations and updates the Tender Number details and also updates the Estimate Section details.

Auto Update Hours

If the exact text is added to the second description column of "**=Hrs**", the hours in the quantity column automatically update. This covers last minute items being added to the estimate.

If a percentage of hours is used, e.g. lost time might be 18% of total hours, this can be expressed as a factor, as follows, "**=Hrs.18** " = 18%

Auto Update Materials

If the exact text is added to the second description column of “=Mat”, the materials in the quantity column are automatically update. This covers last minute items being added to the estimate.

If a percentage of material is used, e.g. job insurance might be needed to be applied at a rate of 2.5% of total material, this can be expressed as a factor, as follows, “=Mat.025 ” = 2.5%

Cost Centres Material, Labour and Alternate

The front sheet will also allow for the above mention cost centres to be added to the Front Sheet, the same way they are applied to the estimate sections.

If you are unsure of a Cost Centre you can do a right click on the field area, when in the entry mode.

This will open a splash window displaying a list of the appropriate cost centres, so the correct one can be selected and added to your current field.

Network Feature

With a network, another user can open the Front Sheet and view the contents, **but cannot modify it**. The originator of the Tender Number is the only person who can modify the tender “**Front Sheet**”, as any modifications made to Estimate workings would not be reflected in the Front Sheet and errors could result.

Should another user want to participate in the assembly, the originator opens the Front Sheet and then both can view the assembly or modifications on their computer and communicate over the phone. The window will refresh every 20 seconds reflecting any changes.

PC and Contingency Sums

When these values are entered they are taken as totals of PC and Contingency Sums and considered to be estimates only to be expended as directed in the contract. Usually these costs must be submitted to the principle or client for approval before they can be expended.

Therefore PC and Contingency Sums are not included in GST calculations, as they may not be expended in the course of the contract. The tenderers commercial conditions should contain a statement similar to the following: “**GST has not been included on PC and Contingency Sums**”.

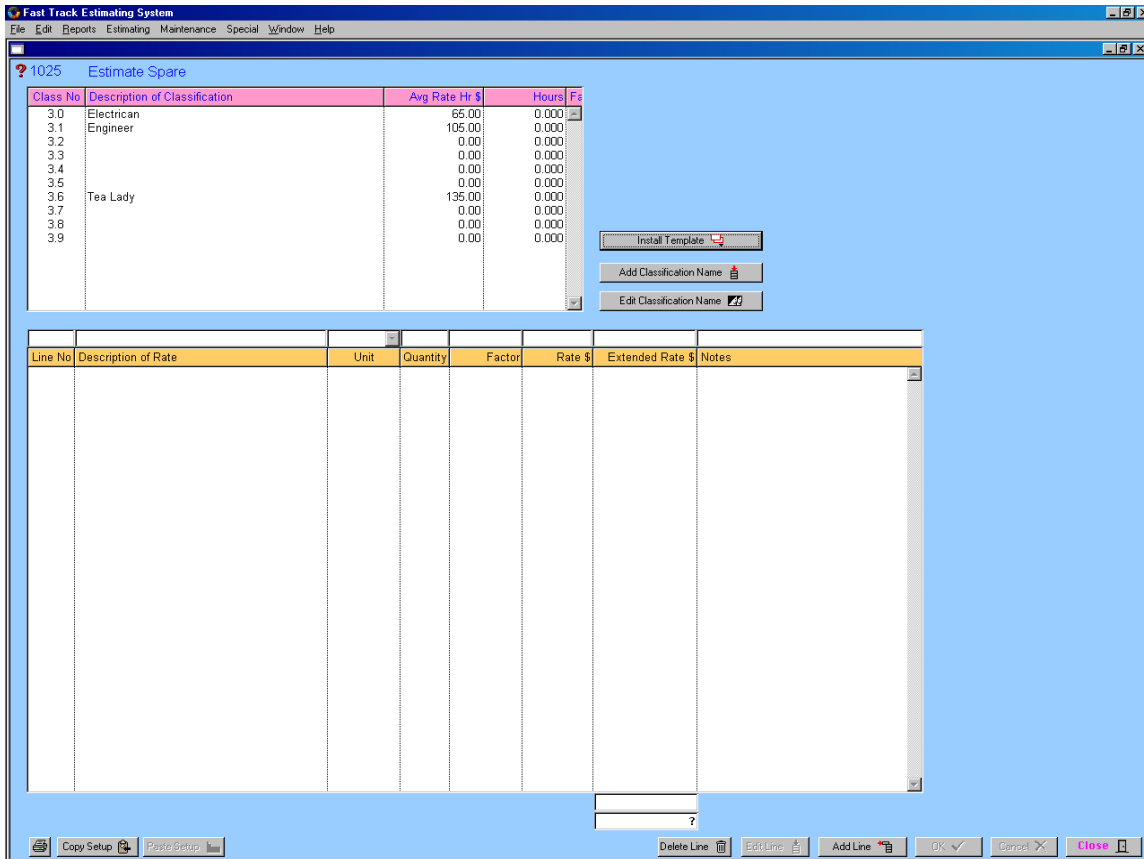
Should the client require the final price to include GST in the PC and Contingency Sums, mark up by the current GST value and change the figures. If PC and Contingency Sums mark ups are to be spread across the section prices, i.e. included in the total price, refer to the Front Sheet.

Mark up PC and Contingency Sums using the “**Front Sheet**” by adding lines in and splitting the cost over labour and material. Profit on Material and Labour can also be done this way.

Be careful not to double up by applying profit on profit.

7.1.2 Project Rates

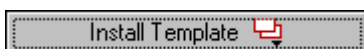
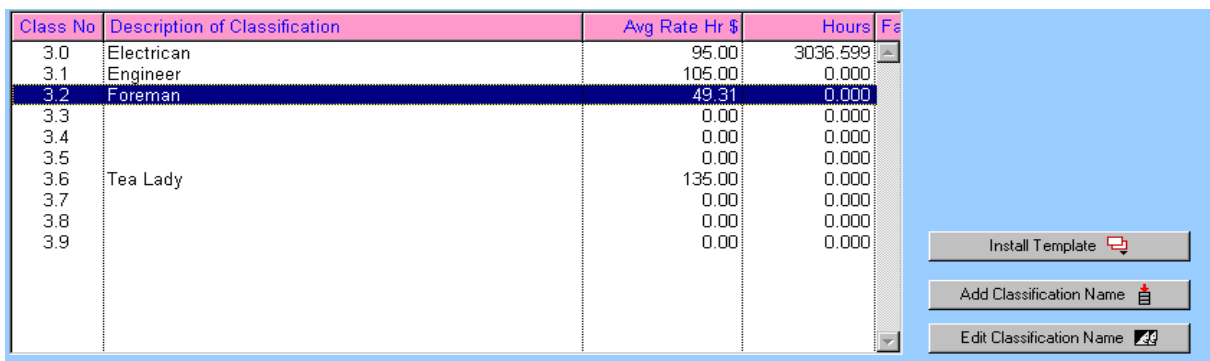
Many projects have special allowances and different working hours so there is a need to document, compile and produce an hourly rate to be used in the Front Sheet. See detailed operation of this screen in below.



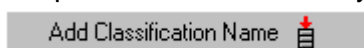
The Project Rates screen is used to calculate an average hourly rate. The window provides an hourly rate for labour applicable to the project. The **Project Rates Button** is located in the Tender Number Screen.

The Project Rates Window consists of two screens, the **Summary Screen** and the **Calculation Screen**.


The Summary Screen displays Labour Classifications. An Estimator has an option to install template, edit the template or create a new labour classification and edit an existing classification.



Click this button to install already existing template in the Fast Track Estimating System. The template comes from the System Preferences window.



This button enables to add a new classification name.

Edit Classification Name 


Highlight the required classification in the Summary Screen and click this button to edit the classification name.

The Calculation Screen is used to calculate an average hourly rate for specific labour classification. The average hourly rate calculated in the Calculation Screen is displayed in the Summary Screen. The Average Hourly Rate calculations can be edited in this window at any time. If the information is modified, the program will automatically update an **Average Hourly Rate** in the **Summary Screen** and **Front Sheet**.


Line No	Description of Rate	Unit	Quantity	Factor	Rate \$	Extended Rate \$	Notes
1	=Base Working Week	Hours	60.0	0.0000	0.00	0.00	
2	Time	Hours	40.0	1.0000	35.00	1400.00	
3	Time * 1/2	Hours	10.0	1.5000	35.00	525.00	
4	Time * 2	Hours	10.0	2.0000	35.00	700.00	
5	Site Allowance	=Hours	60.0	1.0000	5.56	333.60	
						2958.60	
						49.31	

Add Line 

This button enables to add an average hourly rate to the classification selected from the Summary Screen. When clicking on the Add Line button for the first time, the first line will be displayed automatically giving you an option to enter information in the fields for the second line.

Delete Line 

Highlight the lines to be deleted and click **“Delete Line”** button.

Edit Line 

Edit the Description of Rate by clicking **“Edit Line”** and entering the new information.

Copy Setup 

This function allows copying project rates information into an Estimate via the Clipboard. Highlight the required lines and copy the information by pressing the **“Copy Setup”** button.

Paste Setup 

This function allows pasting project rates information from one Estimate to the other. Copy information into the Clipboard, click **“Paste Setup”**, and the contents will be inserted in the Estimate.

7.1.3 Documents (Sub window)

The intent of this window is to give the Estimator a tool to manage files specifically associated with the estimate. The window also allows for the quick and official redistribution of files via e-mail. See detailed operation of this screen in Section 7.18 and 7.18.1.

The Documents Button is located in the Tender Number Screen.

This button when it is active means that there is an active Estimate. This opens a window that allows the user or users to manage Tender electronic file information in a uniform structured manner. The electronic file information such as Specifications, Drawing, Suppliers responses and Submitted Information is located in a base folder generally in central area on server.

This way all users store the information in a pre-set file structure enabling all users to quickly retrieve information and others to store information in place known to everybody in the organization.

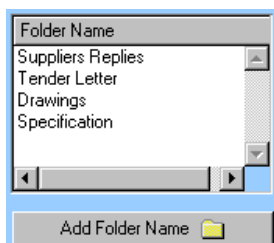
The reason to have such an accessory is avoid the problem where an estimator accumulates electronic files in a location known only to them, and they may be on their own hard drive. Then other people then have to work with these files, they then experience the problem of finding the location of the files. Even after a while the estimator may forget the exact location.

The other advantage is that the list of file names can quickly be turned into an Excel file make it quick generate a list of documents that then can be pasted into a word processing document.

The structure of the folders is not pre-set and is determined by the person on the network that holds the restricted password (see Atad Data). The initial set up of folder names needs some discussion however this structure can be altered at any time.

Whilst the folders can be deleted from the template at any time, the file operations will not go through and delete any folders previously created in previous templates.

How it Works



The first step is to set up the template, first change to the restricted password and then open the window called "Server Preferences", this found under the pull down menu called 'Special'.

Add the folders names when prompted and if you want to delete double click to remove lines. When finished adding all the names, click on "Apply" to save and close the window. Please remember to change back to normal password.

The Tender number is created and the estimate proceeds the electronic files come in via email etc. The user then clicks on the button, the user is asked do they want to set up a folder structure, answer yes the folder is then set up as per your previously set up template.

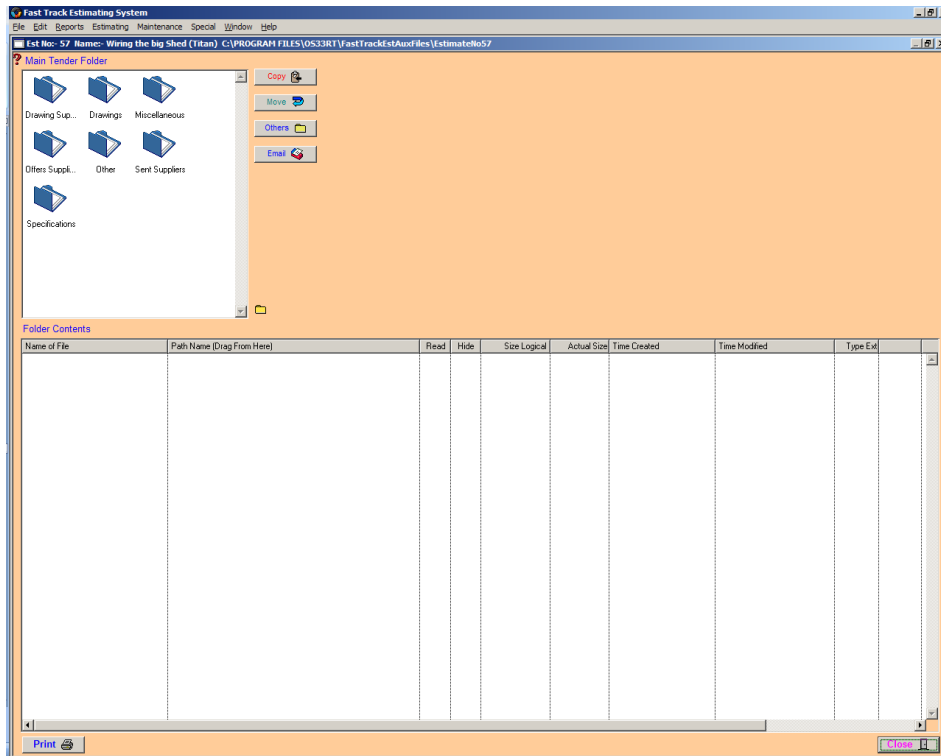
The procedure runs creating a new folder within the folder called "FastTrackEstAuxFiles" this folder is located and initially automatically created adjacent to the data file called "Estimate.df1".

Tender number as being the unique name relating to the tender number is created, then the sub folder established in template are located with tender number folder.


The **Tender Documents** window is opened.


7.1.3-1 Tender Documents Window


The intent of this window is to give the Estimator a tool to manage files specifically associated with the estimate. The window also allows for the quick and official redistribution of files via e-mail.




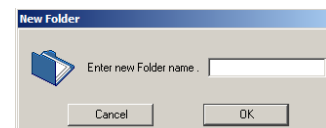
The above graphic shows the files contained within the folder called “Drawings” by clicking on the line in the folder contents the system will open the necessary executable file and run that particular file if available.


Copy  This function copies the file from one location to the selected folder location, while leaving the other file intact. This could be a problem with QA if the file is modified in the new location and not synchronized with the other file in the old location.


Move  This function moves the file from its location to the selected folder location. This button has a similar function as the commonly used “cut” feature in computers.

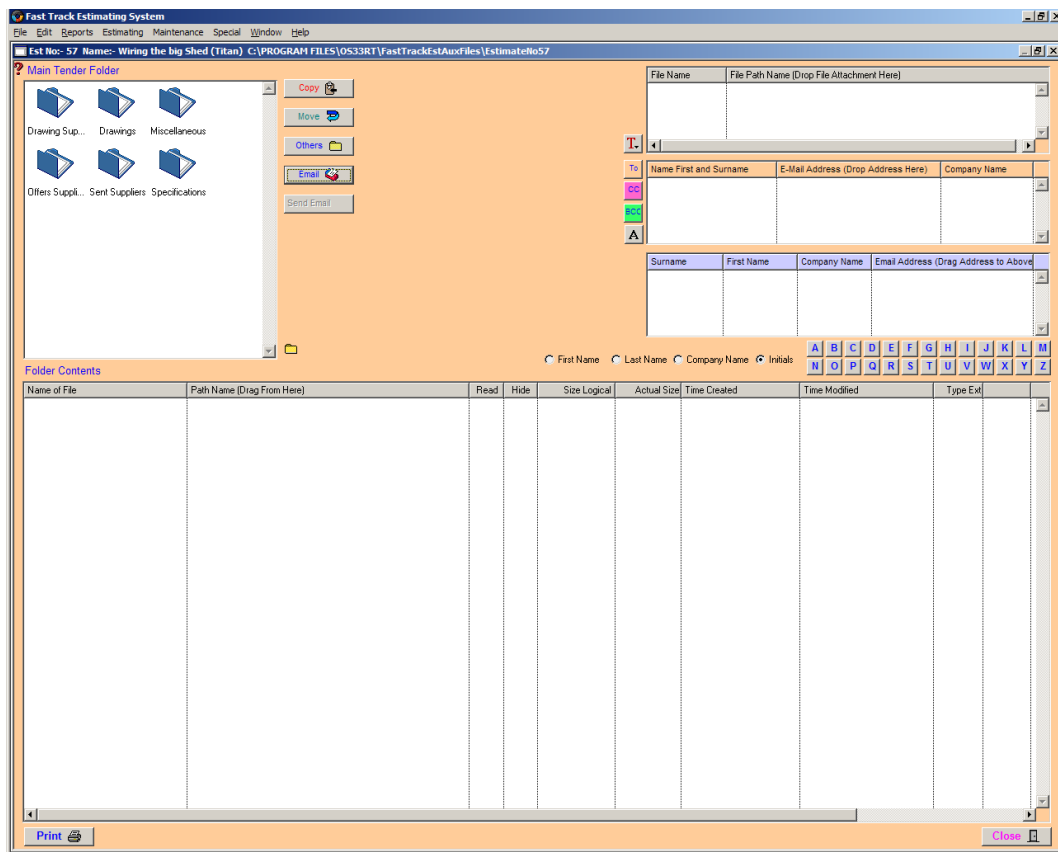
Others  This opens a browser icon and allows other folders to be accessed on your computer or on the network so the user can build up a list of contents of folders other than the Tender folders.

 This button will create a new main folder. Click on this button, enter a Folder Name and press OK. Folders can be deleted only by using the Windows System.

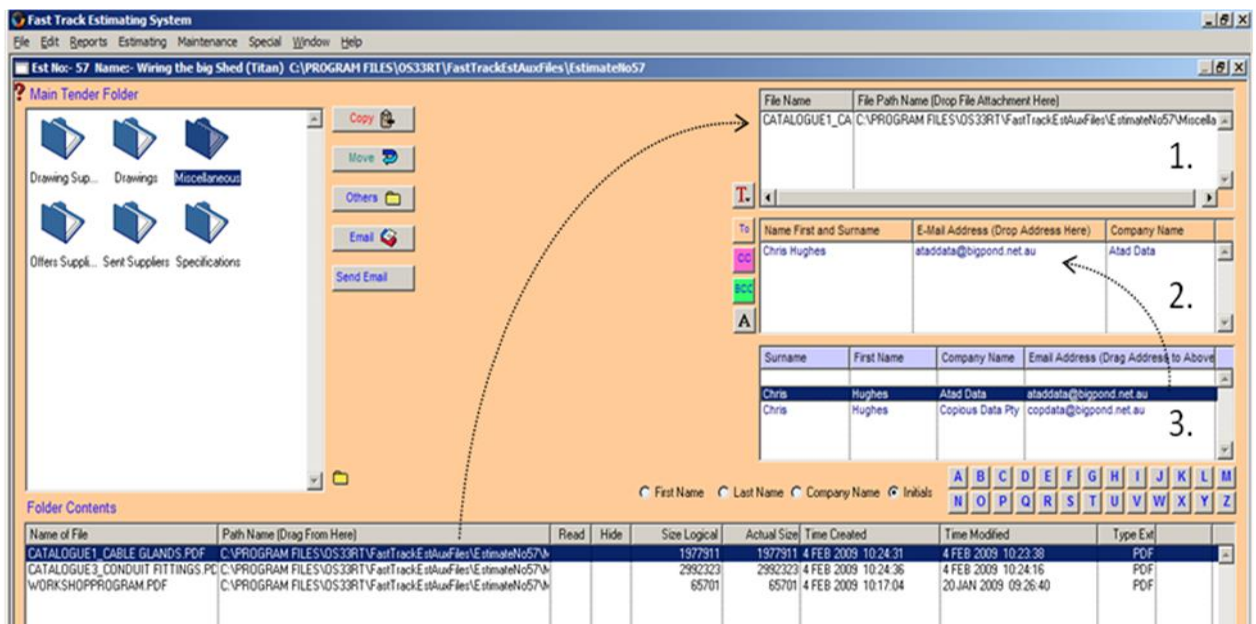


Print  This button creates a Microsoft Excel file allowing the user to extract information from the columns.

Email  This function is used to e-mail files such as drawings or specifications, directly from Fast Track. After clicking this function the following screens will appear at the top right corner of the Main Tender Folder window.



E-mailing Files



Attachments List (1.)

This window is used to attach files and documents to your e-mail. To populate this list, drag the selected file from the bottom table over to the Attachments List (1.) and drop. Double click to delete a file no longer required.



Text - This button is used for inserting a short message. The message can be up to 1500 characters long.

Recipients List (2.)

Recipients List is where you drop the recipients' addresses. These addresses can be dragged from the Address Book below or entered manually.



To (Primary Recipients) - This button opens the window (if it is not already open) for dragging the recipients' addresses from the Address Book.



Carbon Copy – Click this button to drag an address into Carbon Copy. This is used to e-mail attachments to secondary recipients.



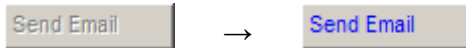
Blind Carbon Copy – Click this button to drag an address into Blind Carbon Copy. This is used to send the same e-mail to recipients whose addresses are not to be revealed to others.



Add Address Manually – This button is for inserting an email address manually. If you want to put the person's name as part of the address, the address and the name has to be separated by comma, e.g. ataddata@bigpond.net.au, Chris Hughes.

Address Book (3.)

You can narrow the 'Address List' by clicking on the letters. Select and drag the address into the Recipients list (2.), which is located directly above the Address Book (3.).



Once you have added the recipient into the Recipients List (2.), the Send Email button will be automatically activated. Click this button to proceed with sending the message. Once sent, go to the E-Mail Log window, to view a confirmation that the E-mail was sent successfully.

Sub window finish



Unlock and



Lock Screen

When more than one user is working on the programme the Tender Number screen will refresh every 25 seconds. To disable the screen from refreshing, click the opened padlock in the top right hand corner which will lock the screen. To unlock the screen click the padlock into the opened position again.



Print

Click the "**Print**" button to obtain a printout of the Estimate details on the screen. If no record is selected the "**Print**" button will be shown as disabled.

Click the "**Close**" button to return to the Estimating Menu

Notes