

Section 12

Tips & Tricks:

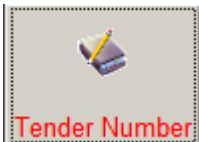
12.1 Password

For changing Passwords at any stage when using the program, the user can switch to Level 1 for entering confidential information and then switch back so that viewing is restricted. Level 1 gives access to all menus and all information. Level 2 restricts the user to estimating only.

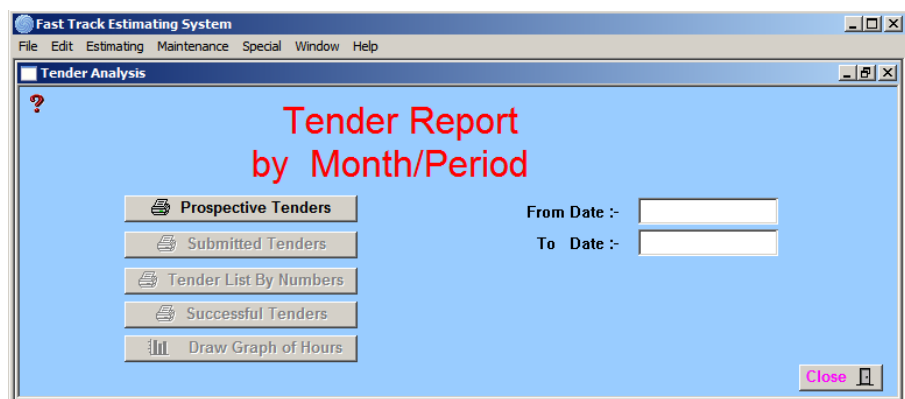
Information accessed at Level 1; Tender Price \$ Submitted, Tender Hours and Material Prices \$. Printing of this information is also restricted to Level 1.

Note: The issuing of passwords has to be prearranged, also any changes that might be required.

12.2 Tender Analysis

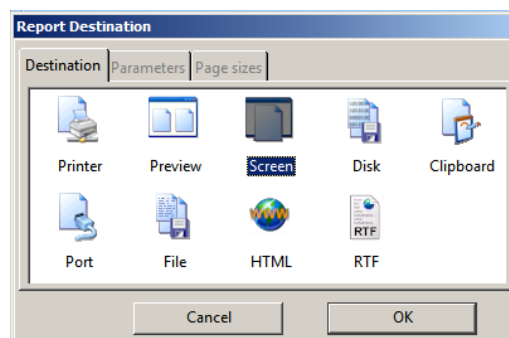


If you do the **right click** on the Tender Number button on the navigation screen you can find the tender report analysis function.



To provide a report on “**prospective**”, “**submitted**”, “**numbered**” and “**successful**” tenders, or a graph of tender hours by month / period.

Insert dates in the “**From Date**” and “**To Data**” boxes, press Enter and the buttons will be activated.



Select the Tender Report required and a “**Report Destination**” screen will appear. Double click the icon to send the report to the required destination.

12.3 Server Preferences

LC No	Labour Classification	Hrly Rt \$
3.0	Managing Director	40.00
3.1	Regional Manager	38.00
3.2	Supervisor	35.00
3.3	Leading Hand	25.00
3.4	Labourer	18.00
3.5	Tea Lady	15.00
3.6		0.00
3.7		0.00
3.8		0.00
3.9		0.00

The preferences shown here are the main server preferences and can only be accessed by **Restricted Passwords**. These passwords are available from Atad Data upon request.

The window has Average Hourly Rate in \$ and a Material Mark up %, the information in these fields is entered into the window from where the tender number is taken out as the default setting.

The other fields are for nominating the department names that might be used, these are then used for providing Tender Analysis reports break ups.

12.4 Labour Cost Centre

This function displays a table showing Labour Cost Centres attached to the Estimate. It shows the Hourly Rate, Hours and Labour Factor relating to the Estimate.

The Labour Factor is derived from the Front Sheet. When the average hourly rate has been calculated, the factor is derived as some reports use the factor to arrive at a more accurate value using the Labour Cost Centres.

The Labour Cost Centre break ups will be displayed in the Front Sheet. The Labour Classification description and hourly rate relating to each Estimate can be modified while in the Front Sheet, as the table contained in the System Preferences is only a template. If the hourly rate or description is changed in the Front Sheet these are assigned to the table attached to the Estimate.

Modify Labour Cost Centres

Labour Cost Centre numbers 3.0 to 3.9 are generated automatically. This list field is then stored on the server and can be modified at any time. Click in the Labour Classification field to type in the name and tab across to insert the required hourly rate.

The rates will be used and assigned to an Estimate as historical information. This is used as a template and can be changed at any time.

LC No	Labour Classification	Hrly Rt \$
3.0	Electrical Tradesman	55.00
3.1	Trades Assistant	50.00
3.2	Apprentice 2nd Yr	48.00
3.3	Instrument Fitter	65.00
3.4	Commissioning Eng	105.00
3.5	Welder	75.00
3.6		0.00
3.7		0.00
3.8		0.00
3.9		0.00

Note: Refer to Section 8.1 to see how Labour Cost Centres are applied to the Master List.

12.5 Back Up

It is extremely important to backup your program. Computers can be stolen or perish in fires. Should this happen you can always replace your computer but the information is lost forever.

Play it safe, do regular backups and keep them in a remote safe location.

The program disc that was supplied with the package can act as a backup for the Omnis Runtime Data Base Program, Application Program and the Basic Data File. (The basic data file contains information such as the Indexes and the Commodity Grouping Information). The information contained in the file called Term3.DF1 can become a large file and must be kept as a contiguous unit. Backup this file onto a CD.

The method that can be used for the single computer system are as follows:

- * Microsoft Office Family - Microsoft Back Up, also offers file comparison.

The network user can store a backup copy of the Term3.DF1 Data File on the Hard Drive of another computer on the network, consult your network Administrator.

12.6 Lighting Price Comparisons

Does the Fast Track Estimating System (FTES) have an area in the program for making comparisons of suppliers lighting prices, like a spreadsheet? The answer is, No!

This can be easily overcome as follows:

Step 1

Create a dummy Tender Number and close it very late in the Year, so it can be easily found in the active estimate list. This can be used for other estimates.

Step 2

Go to 'Section Descriptions' and enter or edit a name for example "Est 96100 Light Supply - Bright Sparks Pty Ltd". Then enter the next name into the next section of all the suppliers until finished.

Step 3

Enter in your lights descriptions and quantities, and other information if necessary such as labour rates etc. Enter this in the first section only, and then use the duplicate section from the menu bar, this sets up the lighting sections for making comparison when the lighting prices come in from the suppliers.

Step 4

When all prices have come in from the suppliers, and have been entered into computer via the 'Input Sections' Window, make a price comparison viewing the total at the bottom of the list field. That is if, this is your criteria for making a decision to the successful lighting supplier.

Step 5

Using the "Duplicate Section", transfer the successful lighting supplier's information into the appropriate Section of your Estimate.

Step 6

Print out all information for the Estimate file copy if required.

This method can apply to Cable Suppliers, Switch Board Manufactures etc.

12.7 Description Sort

Every Estimator has their own style and method to achieving the final result. Fast Track has the “**Insert**” function in the “Input Est > Sections” window which is used for the odd insert. Where the Estimator wants to group a task and its separate activities, for example:-

“ Main Switch Board	ea	1” and then
“ Main Switch Board Fixings	ea	8”

Then half way through the specification buried in another section or addendum it is found that “ Main Switch board Galvanised Trench Covers lot 1 ” are required, this is where the “**Insert**” function is very handy.

The down side is that this function does not enhance the speed of any Data Base program especially when you are working in large Estimates with large sections. There is a solution that could possibly help, when the take off can not be so well organised and you want to see all activities in a task grouped together in the final print out, try the following:-

An example of how the estimate could look at this stage:

“ Main Switch Board	ea	1 ”
“ Main Switch Board Fixings	ea	8 ”
“ Battery Charger	ea	1 ”
“ Battery Charger Fixings	ea	1 ”
“ Main Switch board Galvanised Trench Covers	lot	1 ”
“ Battery Charger Discharge Test	ea	1 ”
“ Main Switch Board Thermo Scan	ea	1 ”

By using the edit function make your estimate look like the following:

“ 01 Main Switch Board	ea	1 ”
“ 01 Main Switch Board Fixings	ea	8 ”
“ 02 Battery Charger	ea	1 ”
“ 02 Battery Charger Fixings	ea	1 ”
“ 01 Main Switch board Galvanised Trench Covers	lot	1 ”
“ 02 Battery Charger Discharge Test	ea	1 ”
“ 01 Main Switch Board Thermo Scan	ea	1 ”

Click with the mouse on the red text “Description”, this sorts the list of the section into the following order:

“ 01 Main Switch Board	ea	1 ”
“ 01 Main Switch Board Fixings	ea	8 ”
“ 01 Main Switch board Galvanised Trench Covers	lot	1 ”
“ 01 Main Switch Board Thermo Scan	ea	1 ”
“ 02 Battery Charger	ea	1 ”
“ 02 Battery Charger Discharge Test	ea	1 ”
“ 02 Battery Charger Fixings	ea	1 ”

Then by doing one only “**Insert**” into the very first line, even if you do a dummy insert and delete it later, the data base is rearranged once only, and the report prints out and groups all activities of a task adjacent to each other.

12.8 Other Uses than Estimating - Variations

Fast Track can be used for other uses other than estimating. When you win a tender, take out another Tender Number for the project and enter variation numbers into the Section Descriptions. Then enter the labour and material applicable to the variation, this allows you to keep track of additional costs being added to the project value.

The advantages are that an updated report giving totals of materials and hours can easily be printed out allowing the users to keep on top of job reporting.

12.9 Using Update in a New Estimate

The update Window has been designed to update older estimates, however it can be manipulated to speed up the assembly of a new estimate in this situation.

For example, a specialised item such as a "Cable XT" is required in the estimate, it occurs in many sections, you don't know the price, and it won't be available until later in the tender period.

Try this:

Enter in the "Master List" as a temporary item under a cable heading section, the description "Cable XT" plus a fictitious catalogue number ZZZZ901. Make sure it does not duplicate an existing number as this procedure uses the Cat No as a reference. Now insert a labour rate in the appropriate area, and a guess estimated price if you want.

When the price of "Cable XT" comes in from the suppliers, enter the correct price into the Master List and run the Manual update option procedure. The "Manual" update option should be chosen as a precaution.

The prices in all sections will be found and updated to the new price.

12.10 Networking Computers

The Fast Track System has the ability to network beyond the normal setup, normal being that each system has a "Term3.df1" file and data on estimates is compiled in this file, and resides on the C:\Program Files\OSXXRT.

There are times when two (2) Estimators are required to work on the same Estimate at the same time. This is possible, providing that you are on a network and you can see the "Term3.df1" data file on the other computers in the "Omnis Studio" folder.

To do this re-enter your upper level password when you open the Fast Track system, this gives you the access to the command "Change Data File". "File" menu, then by going through the network, and finding the "Term3.df1" file, and opening that file. Both Estimators can work on the same estimate at the same time, with the following limitations:-

- * The estimator that logs onto the remote file has to use the remote Master List and associated files.
- * When working in the window "Est Input > Sections", you may both be working in the same section, however you will not see any updates or changes in the displayed data in the table

field until the screen is refreshed, to do a refresh click on the Section that you require to be refreshed.

- * Every time shut down your system you have to go through the same process above of logging on again.

Note: If both users want to edit the same record at the same time, the first user locks the record and second user's cursor turns into a Padlock symbol. The second user can not modify the record until the first user finishes. This can be a problem if the first user goes to lunch, etc. Should this happen then hold the "Ctrl" key down and "Break/Pause" key until the Padlock disappears. Then you can use other records.

12.11 Subcontractor Prices

When doing a tender review with management on subcontractors, it can be a good idea to show all the subcontractors prices in the estimate. This serves the purpose of being able to quickly analyse the prices and also acts as a quick reference. This can be achieved in the following manner:

Sect	Catalogue Number	Description	Unit	Quantity	Price \$	Dis%	Ext Price \$	Lab Rt	Ext Lab Rt
12		Subcontract Access Control (Winall TV)	lot	1.0	23900.00		23,900.00	8.000	8.00
12		Subcontract Access Control (See All TV)	lot		25800.00			8.000	
12		Subcontract Access Control (Aerials Away)	lot		36900.00			8.000	
12		Subcontract Access Control (Winall TV)	lot	1.0	23900.00		23,900.00	8.000	8.00
12		Subcontract Access Control (Top Gun)	lot		28800.00			8.000	

By placing an " * " in the first character in the "Description" field, they are not highlighted in the checking procedure.

Place a 1 in "Qty" field of the subcontractor that you want to use and remove the " * ", this will be the only record extended.

12.12 PC Sums & Contingency Sums

Some clients when using the "Front Sheet" have a need to markup PC sums. This can be managed in a few different ways, one way is to insert a sum into the "Front Sheet" as a single line item, being either Material or Labour or you may split it over both. However, you must remember that if you make the markup percentage of 10% as a basis, and then mark it up by another 10% profit, then an overall markup of 10+10% will equate to 21%. So a solution might be to add the half in first and allow the markup to take care of the other half.

An alternate way is, not to use the "Material Markup %" and "Labour Markup %" fields at the bottom of the Front Sheet. You can insert single line entries for Material Markup, Labour Markup and PC Sum Markup in the body of the "Front Sheet" when all the overhead structures are derived.

Front Sheets - Making Alternate Templates

Fast Track is able to cater for different templates for different needs, as the 'Front Sheet' for a commercial, industrial and transmission line vary in their requirements. Some companies are stringent on the approach to Front Sheets and only want to have one (1) template.

In combing all aspects of the different types of projects into one common Front Sheet can become cumbersome, and in the end defeat the purpose of providing memory trigger by having too many lines to read.

Therefore, make up a template with 70% of what may be required, and have a manual check sheet and should any extra entries have to be added, then add those items to the end of sheet or edit and change unused lines.

Follow the steps to make templates for alternate Fronts Sheets:

Step 1

The method for having such templates can be achieved by making up a false estimate and making it an early date, so it is not included in estimating activities reports.

Step 2

Go to " Estimate > Input Section " window and add one line with \$1.00 of material and 1 hour of time, this is to defeat the protection when opening the "Front Sheet" window.

Step 3

Make up the "Front Sheet" the way you require it, leave the PC Sum and Contingency Sums blank.

Step 4

Go to the window "Export Fast Track" (Save) the file to your Omnis7 directory. Make the file name something that has meaning, for example, "Indust-FSheet.df1". The Estimate (template) can be deactivated then to stop unnecessary screen congestion.

Step 5

When you need to use the template in lieu of the one stored on the server, go to "Import Fast Track" and import the stored template into the Estimate. The user has the option to overwrite an existing template if one has already been started or the "Front Sheet" window has already been open. Remember to remove the \$1.00 and 1 hour.

Note:

The Template can be reactivated and modified if required, the existing file can be overwritten to reflect changes. The templates can be saved onto the server into the estimate number file so every user can access them.

Notes