

Estimating XG

SOFTWARE

This document contains summary information on new features, late-breaking product information, updates, and troubleshooting tips not covered in the Trimble® Estimating XG documentation.

Introduction

These release notes describe the features and enhancements that are new in version 2.2 of the Estimating XG, for the following components only:

- XG Framework
- XG Common
- XG Estimating
- XG Reporting (related to XG Estimating)

For further support information, go to <http://mep.trimble.co.uk/support>.

New features and changes

The improvements that have been made to the Estimating XG software are summarised in the following table.

Upgrade procedure

Updates will be made available and automatically downloaded via Trimble LiveUpdate.

Version: 2.2
Date: 2016
Month: September

Summary of features and changes

ENHANCEMENTS AND FEATURES	
Jira ID	Description
MEPEU-371 , MEPEU-371a	Administration – Added an option to administer Global Direct Entries
MEPEU-965	Takeoff – The Fill Down function has been amended so that a selection of items may be selected to 'Fill Down' into
MEPEU-1130	Takeoff - Added Function Key shortcuts
MEPEU-1282	Administration – Added the ability to use predictive search in the Product Structure column
MEPEU-1252	Administration – Showing the Manufacturer column in Discontinued Items routine, if added as a column in Products
MEPEU-1200	Takeoff – Edits may now be made to items in the Takeoff grid when viewing the estimate by Commodity
MEPEU-1575	Settings – Added a Default Action in Takeoff setting for renaming a level
MEPEU-1639	Enquiry – Updated the Last Modified date field in the Estimates grid to show Date / Time
MEPEU-1637	Administration – A Grade may now be specified against each database item
MEPEU-1640	Tender – A simplified Tender option may now be defined
MEPEU-1642	General – Rebranded the software to bring the 'look and feel' in line with Trimble guidelines
MEPEU-1749	System – Users that have been marked as Inactive may now be re-activated.

BUG FIXES	
Jira ID	Description
MEPEU-1273	System – If shared, the Speed Menu is now accessible from newly created system companies
MEPEU-1275	System – If shared, Supplier net prices are now accessible from newly created system companies
MEPEU-1302	Takeoff – Resolved an issue where Prelim Items added to Takeoff with a manual labour value were being ignored
MEPEU-1385	Administration – Editing and saving a Kit no longer results in the list jumping to the top item
MEPEU-1471	Administration – Resolved an error that displayed when a Commodity Code was deleted
MEPEU-1476	General – Resolved a compatibility issue that caused an error if exporting to Microsoft Project 2010
MEPEU-1490	Administration - Ordering the Manufacturer / Range grid column headers no longer causes an error to be displayed
MEPEU-1495	Administration – Dragging and dropping Kit folders no longer causes an error to be displayed
MEPEU-1497	Administration – Product Groups that are applied to database items can no longer be deleted
MEPEU-1503	Administration – Types of Measure that are applied to database items can no longer be deleted
MEPEU-1508	Administration – Ordering the Discounts grid by the Edited By column no longer causes an error to be displayed
MEPEU-1529	Administration – Resolved a concurrency issue when editing the Active Product Selector
MEPEU-1535	Administration – Resolved a concurrency issue when editing Tender Styles
MEPEU-1536	Administration – Item Default Categories may now only be edited by one user at a time
MEPEU-1537	Takeoff – Item multipliers defined to 3 DP now display correctly on reports
MEPEU-1586	Tender – Product Groups assigned to Prelim items now display correctly
MEPEU-1590	Takeoff – The Job Structure will now only show the tree view for items that are not deleted, unless the Show deleted levels and detail check box is checked. It will refresh the tree view if you change this value. This applies to all Group By options.
MEPEU-1598	General – Grades and Grade Areas may no longer be deleted if in use
MEPEU-1601	Enquiry – It is no longer possible to move an enquiry to a folder which has been deleted by another user
MEPEU-1602	General – You may no longer import an enquiry if the destination enquiry is in use
MEPEU-1605	Reports – Date validation added to the criteria selection to prevent an invalid date from being defined

MEPEU-1606	General – You may no longer import an estimate if the destination estimate is in use
MEPEU-1608	Enquiry – Exported confirmation message is displayed on the correct monitor in multi-monitor environments
MEPEU-1609	General – Grid filters now use the correct view if one has been defined against the filter
MEPEU-1610	Attachments – Checking in an attachment no longer causes an error
MEPEU-1613	Takeoff – Level multipliers defined through the New Estimate Wizard are now included in calculations
MEPEU-1616	Takeoff – Resolved an issue where incorrect totals were displayed when collating items with related / user related items
MEPEU-1635	Takeoff – Adding a Level to the Level Library that has a blank Material Category no longer causes an error
MEPEU-1641	Takeoff – Unticking the Discipline option on the Summary Totals screen now hides the Discipline column instead of just blanking out the values
MEPEU-1649	Tender – The percentage is no longer lost when toggling between Profit percentage and Margin percentage on the Prime Cost Modelling, Mark-up Modelling or Final Mark-up pages
MEPEU-1658	Reporting – Users without the Delete permission may now edit existing reports, assuming they have the View and Edit options set
MEPEU-1685	Reporting – Renamed reports now show the correct name in previews and prints
MEPEU-1686	Takeoff – Rectified an error that occurred if exporting an estimate via the Planning Export option
MEPEU-1907	System – Resolved an error when exporting the Administration data
MEPEU-1948	Reporting – Reports are now listed in alphabetical order within their group
MEPEU-1975	Takeoff - Site Adjustment percentages are now applied as soon as saved instead of requiring the user to click out of the field
MEPEU-1980	Reporting - Improved format on Level based Bill Reports

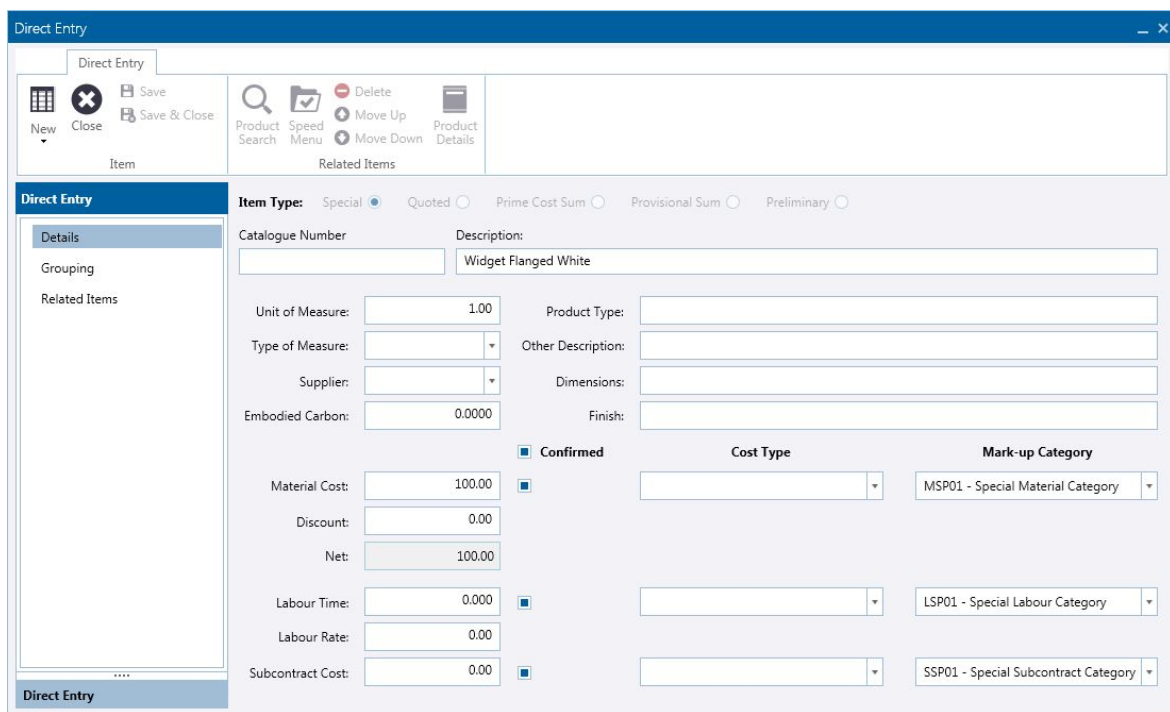
New features details

MEPEU-371 – Global Direct Entries Administration

A new Administration function has been added to allow the management of Global Direct Entries. A Direct Entry is a non-database item that may be used within an estimate and is common to all users.

Adding a Global Direct Entry from the Administration menu

1. From the home screen, navigate to **Administration / Product Database / Global Direct Entries**.
2. Select the type of Global Direct Entry you would like to create from the Direct Entry Types panel.
3. Click **New** on the menu ribbon.



The information that can be stored against a Global Direct Entry is identical to adding a direct entry when in an estimate. This could be a basic non pricing database item or may be more advanced with a set of Related Items.

When creating a new Global Direct Entry there are 3 available options from the **New** button:

- New Direct Entry To create a single new Direct Entry
- New Direct Entry from Current To create a new Direct Entry using the currently selected item as a template
- Multiple New Direct Entries from Current To create multiple new Direct Entries using the currently selected item as a template

MEPEU-317a – Global Direct Entries Administration (Import)

This option allows you to import Global Direct Entries to the Product Database from an Excel Spreadsheet or Comma Separated Values (CSV) file. This file may be something that you have either exported from another software package or manually created.

Navigating to the Global Direct Entries Import option

1. From the home screen, navigate to **Administration / Product Database / Global Direct Entries**.
2. Select **Import Direct Entries** on the ribbon bar.
The Global Direct Entries Import wizard is displayed.
3. In the **Input file has a header record** check box, select your option:
 - Checked** - If your file has a header row the column headings will be shown within the **Source** column in the **Column Mappings** area.
 - Unchecked** - If your import file doesn't have column headings the **Source** column will be populated with unique markers.
4. Select the file you wish to import using **Browse**.

Setup Field Mappings

Select the Direct Entry Type you are importing from the **Type** drop-down list.

Within the **Column Mappings** area your import file column headings are shown as **Source** fields and the mapped Takeoff fields are shown as **Destination**.

Each column of data within the Takeoff is allocated to a single column within the import file. Once you have mapped a destination field to a source column, that destination field will be removed from the list.

Each column in your import file is displayed and a destination field within the Takeoff may be allocated to each column.

***NOTE** — If the import file (source) column headers match the description of a destination Direct Entry column, then the destination field will be automatically mapped.*

The **Data Preview** grid shows a preview of the first 30 rows of data based on your current field mappings and may be used to verify that your defined mapping is correct, prior to continuing with the import process.

***NOTE** — You may have more columns within your source file than you wish to import; if no destination is mapped, that column will be ignored by the import wizard.*

To set a destination field:

1. Click in to the **Destination** field you wish to set.
2. From the drop-down list, select the column you wish to map.

Saving Field Mappings

Once you have completed the field mapping process, you may save that mapping for future use.

This may be of benefit if you have created a standard import template or if your import file is being created in a fixed format from another software package.

To save a field mapping:

1. Map all of the required columns within the **Column Mappings** area.
2. Click **Save**.
3. Give your mapping a unique **Name**.
4. Click **Save**.

Once saved, the mapping may be selected on future occasions from the **Select Saved Mapping** drop-down list. Saved mappings may also be renamed or deleted later.

Available Columns

*Required columns are denoted by **

- | | |
|------------------------|------------------------------|
| Catalogue Number | Material Cost Confirmed |
| *Description | Material Cost Type |
| Dimensions | Material Markup Cat Code |
| Discount | Minor Commodity Code |
| Embodied Carbon | Other Description |
| Finish | Product Group Code |
| General Commodity Code | Product Type |
| Labour Cost Type | Subcontractor Cost |
| Labour Markup Cat Code | Subcontractor Cost Confirmed |
| Labour Rate | Subcontract Cost Type Code |
| Labour Time | Subcontract Markup Cat Code |
| Labour Time Confirmed | Type |
| Major Commodity Code | Type of Measure Description |
| Material Code | Unit of Measure |

MEPEU-965 – Fill Down (Selected)

The **Fill Down** function has been extended so that you may optionally affect only those rows within the Takeoff grid that have been highlighted.

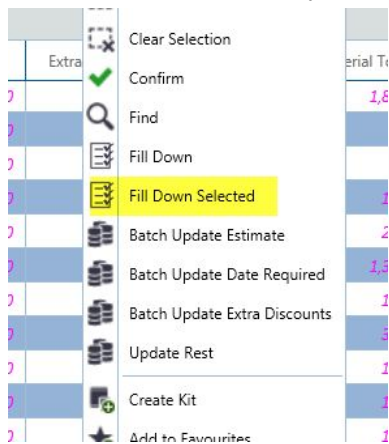
Using the Fill Down Selected option

From within the Takeoff grid:

1. Update the required field to your new value.
2. Select the rows you wish to update.
3. From the **Item Actions** group of the ribbon Menu, click the drop-down arrow to the side of the **Fill Down** option.
4. Select **Fill Down Selected**.



The **Fill Down Selected** option may also be found on the right-click menu.



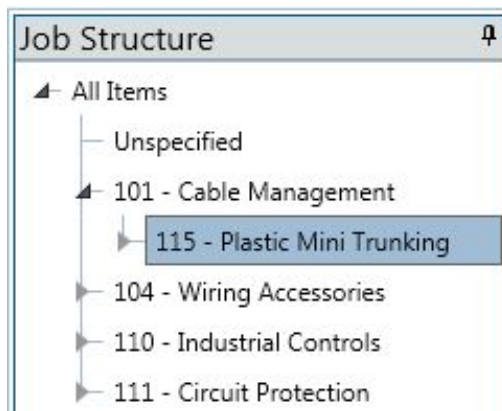
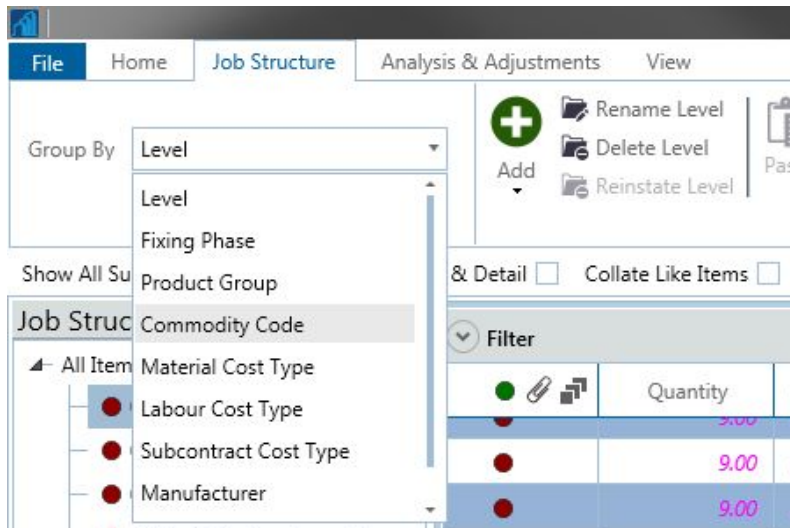
MEPEU-1130 – Takeoff Function Keys

To aid in speeding up the Takeoff process, a number of Function **F** keys have been introduced:

- F3** - Show product search
- F4** - Show speed menu
- F5** - Add direct entry
- F6** - Show favourites
- F7** - Open level library
- F8** - Toggle level details

MEPEU-1200 – Takeoff edits using extended structure

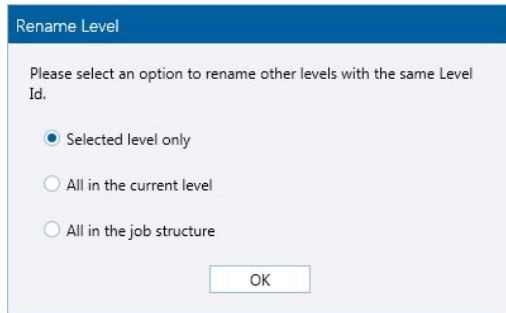
Previous versions of Estimating XG have restricted users so that edits to the Takeoff could only be made whilst the **Job Structure** was set to group by **Level**. This update allows a more flexible approach, by allowing edits to Takeoff lines when viewing the job by any of the grouping options.



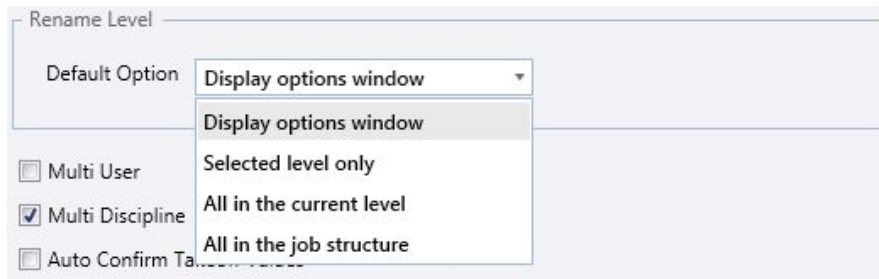
NOTE — You can make edits to Takeoff lines when grouping by other criteria than **Level** only if the estimate is **NOT** flagged as **Multi User**.

MEPEU-1575 – Default Option for Rename Level

When renaming levels in an estimate's job structure, a confirmation message is displayed as below:



A new setting has been created so that a system-wide default may be set. This option may be set by navigating from the Home screen to **File / Settings / Estimating / Takeoff Options**.



The options are:

- **Display options window** (Default Option) – The software will always prompt when renaming a level
- **Selected level only** – Only the selected level will be updated
- **All in current level** – Any level with the same description within the selected level will be updated
- **All in the job structure** – Every level with the same description in the estimate will be updated

MEPEU-1637 – Adding a Grade to a Product

An option to define a **Grade** against database items has been added to the **Grouping** tab of the **Product Details** screen. Grades defined against database items will be used when the item is added to an estimate and will automatically show the Grade within the **Labour** screen within the **Tender Wizard**.

The screenshot shows a software interface for product details. The title bar reads "Product: K2747WHI Socket 2 Gang Switched DP 13A White". The interface is divided into several sections:

- Product** (top left): Includes icons for New, Reset All, Save, Save & Close, and Close.
- Supplier Details** (top middle): Includes icons for New, Delete, and Product Search.
- Related Items** (top right): Includes icons for Speed Menu, Move Up, Move Down, and Product Details.
- LUCKINSlive** (top right): The company logo.
- Product** (left sidebar): A navigation menu with options: General Details, Cost Details, Prices, **Grouping** (selected), Supplier Details, Related Items, User Related Items, and Price History.
- Grouping** (main content area):
 - Manufacturer: 5775 - MK Electric - Wiring Devices
 - Brand Name: (empty)
 - Major Range: 069570 - Logic Plus
 - Minor Range: 069571 - Logic Plus Sockets (LOGIC)
 - General Commodity: 104 - Wiring Accessories
 - Major Commodity: 167 - Wiring Accessories - Moulded
 - Minor Commodity: 60 - Socket Outlets 13A
 - Material Category: (empty)
 - Product Group: E520 - Wiring Accessories
 - Grade: Electrician** (highlighted in yellow)

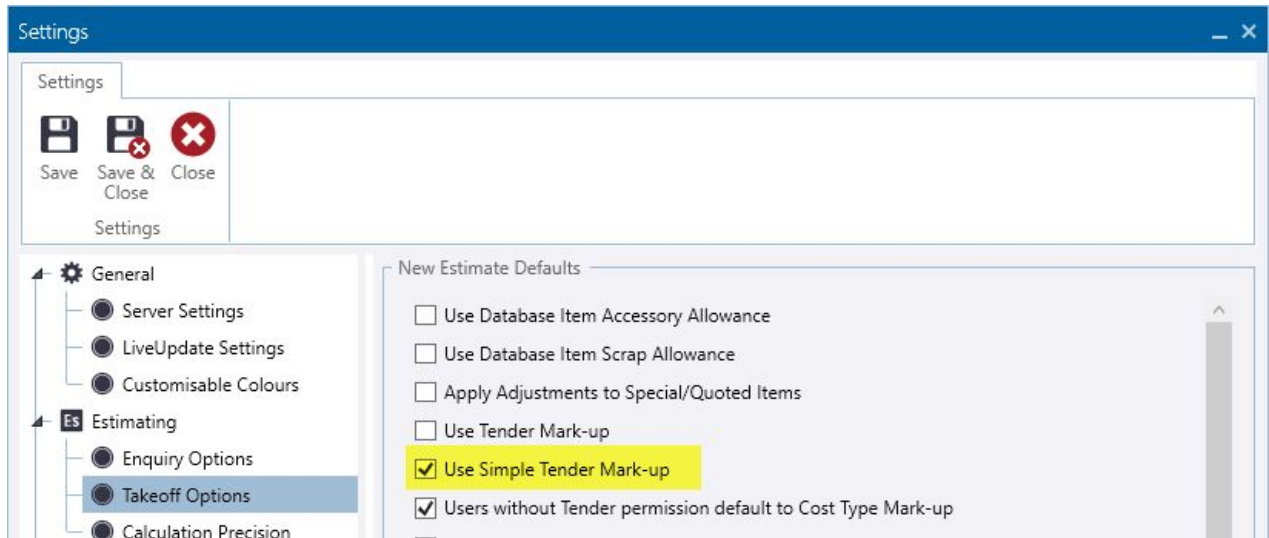
A column showing the **Grade** has been added to the **Products** and **Discontinued Items** grids. The **Grade** field has also been added to the **Product / Batch Update** routine.

MEPEU-1640 – Setting Estimates to use Simplified Tender

An optional simplified Tender routine has been added to facilitate a quicker mark-up process. This option may be set as a default option to be applied against all estimates or individually, against a specific estimate.

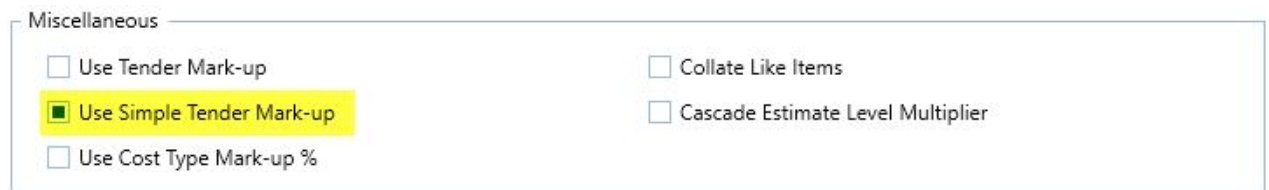
To set all future estimates to use Simple Tender Mark-up

From the **Home** screen, navigate to **File / Settings / Estimating / Takeoff Options** and select **Use Simple Tender Mark-up**.



To set an individual estimate to use Simple Tender Mark-up

From the **Takeoff** screen, navigate to **File / Estimate Information / Miscellaneous** and select **Use Simple Tender Mark-up**.



MEPEU-1640a – Using Simplified Tender

When an estimate is set to use Simple Tender Mark-up you can access the **Tender** screen from the **Takeoff** screen, **Analysis & Adjustments** tab / **Tender**.

Enquiry: E1239 - Estimate : 01

Estimate Tender Simplified

Apply & Close

MarkUp Grouping: **Job Structure** Show Rounding Adjustments: **No**

Estimate Tender Simplified

Grouping Reports

Labour Hours Estimated Hours:

Average Labour Rate

Default On Cost

Material %: Labour %: Subcontract %:

Group	Nett	Inflation %	On-Cost %	Total
▲ CWS				
Materials	55,033.50	0.000	20.000	66,040.20
Labour	83,718.25	0.000	0.000	83,718.25
Subcontract	0.00	0.000	0.000	0.00
▲ HWS				
Materials	94,749.00	0.000	20.000	113,698.80
Labour	159,376.00	0.000	0.000	159,376.00
Subcontract	0.00	0.000	0.000	0.00
	392,876.75			422,833.25

Additional Sums	Cost £	On-Cost %	Sell £	GP %	Include
Prime Costs	0.00	0.00	0.00	0.00	<input type="checkbox"/>
Provisional Sums	0.00	0.00	0.00	0.00	<input type="checkbox"/>

Totals	Cost	Gross Profit £	Profit Margin %
Materials	149,782.50	47,930.40	24.242
Labour	243,094.25	24,309.43	9.091
Subcontract	0.00	0.00	0.000
	392,876.75	72,239.83	15.532

Sub Total:

MarkUp % On Job:

Add MCD: 1/

Tender Value:

The layout of the **Group** grid can be amended by selecting another option from the **MarkUp Grouping** drop-down list on the ribbon bar. By default this is **Job Structure**, but there are other options, such as **Cost Type** or **Commodity**. This is useful if you wish to mark up your estimate other than by Job Structure. Choosing this option however will reset any values you have already entered.

The way any **Rounding Adjustment** is shown on reports may be set using the **Show Rounding Adjustments** field on the ribbon bar. The options are:

- **No** – No Rounding value is shown
- **Per Group** – A rounding value is shown per group
- **As Total** – A single rounding value is shown for the whole job

Below the **Estimate Tender Simplified** ribbon there are three group boxes:

- **Labour Hours** - Displayed by default is the number of Estimated Hours on the estimate.
- **Average Labour Rate** - This can be used to enter a labour rate across the estimate. Entering a figure and then clicking **Apply** produces a warning that you are about to change the labour rates on your estimate to this newly entered figure. Click **Yes** to continue. The labour figure in the **Nett** column of the **Group** grid changes to reflect this new labour rate.

- **Default On Cost** - This allows you to enter a percentage mark-up on **Materials, Labour** and **Subcontractor** figures. Entering values into any of these fields and clicking **Apply** will change the **On-Cost** percentage value in the **Group** grid below.

The details within the **Groups** grid are split between **Materials, Labour** and **Subcontract**. The **Nett** value is shown against each.

You can enter values in the next two columns, **Inflation** and **On-Cost**. The **Inflation** column can be used to enter a mark-up to allow for inflation when pricing jobs which are scheduled to start at a future point in time. The **On-Cost** column is automatically populated if you have defined and applied any Default On-Cost percentages. These values may be manually overwritten or defined.

The **Additional Sums** grid displays **Prime Cost Sums** and **Provisional Sums**. By default these figures are not included in the modelling calculations. To include them, select the **Include** checkbox next to each line. The Prime Costs and Provisional Sums must be added into the estimate as Direct Entries.

The bottom left-hand corner of the screen contains a grid showing the **Totals** estimate values split between **Materials, Labour** and **Subcontract**. Each of these rows shows a figure for the actual **Cost** of that line, the **Gross Profit** of that line as a value, and the **Gross Profit** as a percentage.

The bottom right-hand side of the screen shows the **Sub Total** on the estimate.

Beneath this you can enter an overall mark-up percentage in the **MarkUp % on Job** field. This can be used alone or in conjunction with the individual mark-ups already applied to each section. Select the **Add MCD** checkbox if you wish to add an additional "Builder's Discount" value into the Tender value. By default the MCD value is 1/39th the total value of the job but may be amended by overtyping the 39th to whatever you wish.

Click **Apply & Close** on the ribbon bar to apply all the rates and mark-ups you have entered onto your estimate and then close the Tender screen.

MEPEU-1749 – Marking Users as Inactive / Active

If someone leaves your company, a system administrator may wish to flag them as inactive so that they are not displayed in the **User** field drop-down lists, such as the one on the **Login** screen.

Marking a user as inactive

1. From the **Home** screen, navigate to **File / System Maintenance** and then select the **Users** option.
2. Select the user you wish to mark as inactive and then click **Edit User** on the ribbon bar.
3. From the **Status** drop-down list, select **Inactive**.

The screenshot shows a web application window titled "User: Fred". The interface includes a ribbon bar with "New User", "Save", "Save & Close", and "Close" buttons. Below the ribbon is a "System User Management" section with a left-hand navigation pane containing "General", "Contact Details", and "Member Of". The main content area is titled "General details" and contains the following fields:

- Login Name: Fred
- Password: [text input]
- Confirm Password: [text input]
- Title: Mr. (dropdown menu)
- First Name: Fred
- Last Name: Smith
- Email Address: [text input]
- Status: Inactive (dropdown menu)
- Expiry Date: Active (dropdown menu with "Inactive" highlighted in yellow)

Marking an inactive user as active

1. From the **Home** screen, navigate to **File / System Maintenance** and then select the **Users** option.
2. Select **Show Inactive Users** on the ribbon bar.
3. Select the user you wish to mark as active and then click **Edit User** on the ribbon bar.
4. From the **Status** drop-down list, select **Active**.

Legal notices

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Release notice

This is the August 2016 release (Revision A) of the Release Notes. It applies to version 2.2.0 of the Estimating XG software.