

HeavyBid[®]

Classroom Training



INNOVATIVE
SOFTWARE
FOR THE CONSTRUCTION INDUSTRY

INTRODUCTION

Welcome to *HeavyBid* Classroom Training. Use this booklet as a classroom supplement to gain a general understanding of the software. We start by covering important concepts that you must understand in order to use the system, and then we discuss the estimating process in *HeavyBid*.

The Appendix contains a summary of basic concepts, a glossary, and a list of more ways to learn about *HeavyBid*. If you need information beyond that provided by the classroom training or this booklet, remember that your HCSS Support Team is only one call away.

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IMPORTANT CONCEPTS

Master Estimate

The master estimate is a template used to create new working estimates. It should contain common setup information used in working estimates, such as labor, equipment, crews, calendars, overtime rules, and worker's compensation. A master estimate will rarely have biditems and activities in it because these items are specific to individual estimates.

In *HeavyBid*, you can set up multiple master estimates. This is particularly useful for companies that perform work in multiple counties or states in which different labor and equipment rates apply, or for companies that perform both public and private work.

New estimates are made by creating a copy of an existing estimate. This is the principle behind the master estimate template. We recommend you keep labor and equipment costs updated in your master estimates so that they apply to any new estimate created from the master. In *HeavyBid*, ESTMAST is set as the default master estimate; however, you can create new master estimates to best fit your needs.

Estimate Structure

The structure of an estimate in *HeavyBid* is as follows:

- **Estimates** contain biditems. A biditem is an item that is required by the client to be performed by the contractor. It is part of the basis on which the contractor will be paid. In *HeavyBid*, it can be a pay item, a place to put overhead costs, or it can represent a line of text on a bidform (such as a header or subtotal).
- **Biditems** contain activities. An activity is a function of work that must be completed to make up part or all of a biditem. Biditems can contain multiple activities.
- **Activities** contain resources. A resource can be a labor craft, piece of equipment, material, or subcontractor.
- **Resources** contain cost and are the lowest level of detail in an estimate.



Types of Data

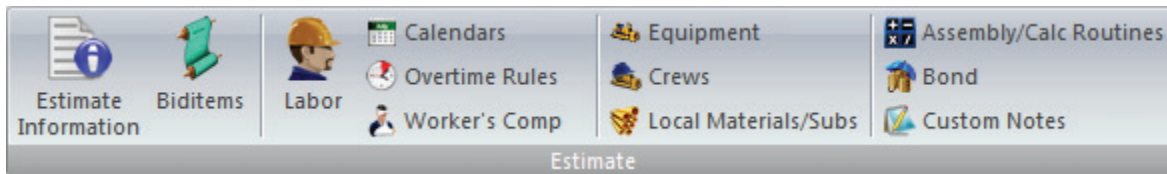
HeavyBid stores information in two types of data: estimate data and system-wide data.

Estimate Data

Estimate data contains information specific to a single estimate. For example, if you change labor or equipment rates in one estimate, it does not affect other estimates. Some estimate data that are regularly used include the following:

- Biditems
- Equipment
- Local Material/Other Resources
- Labor
- Crews

On the Setup tab, estimate data can be accessed from the Estimate group.

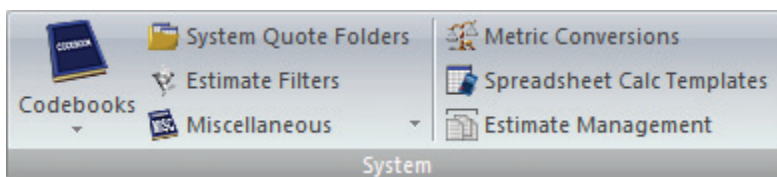


System-Wide Data

System-wide data contains information that is not specific to a single estimate, and can be used in any estimate as necessary. This information is located in the following screens:

- Biditem Codebook
- Activity Codebook
- System-Wide Material/Other Resources Codebook
- Equipment Codebook (Comprehensive versions only)
- System Quote Folders

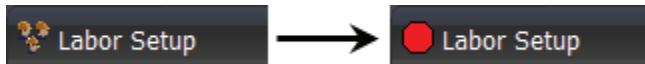
On the Setup tab, system-wide data can be accessed from the System group.



Data Entry

HeavyBid uses many databases to store estimate and codebook information. When you enter data, *HeavyBid* automatically saves your entered information each time you move the cursor to the next data field. This is done by pressing the DOWN ARROW, TAB, or ENTER key.

You can also manually save at any time by clicking the  save icon, pressing F2, or pressing CTRL+S on your keyboard. When you have data that needs to be saved, *HeavyBid* alerts you with a red stop sign  at the top-left of the active window.



While entering data, you can move the cursor to the next field by pressing the TAB or ENTER key. You can also select different fields with the mouse.

Keyboard Shortcuts

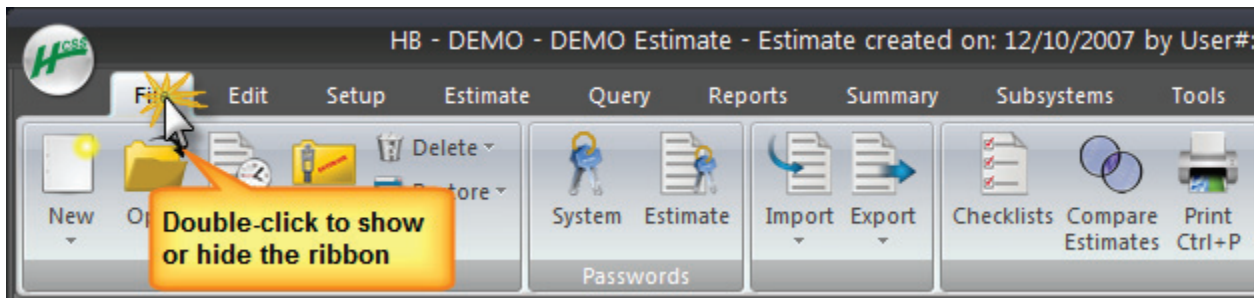
Use keyboard shortcuts to perform common tasks in *HeavyBid* without using the mouse. Shortcuts are usually faster than using the mouse for the same function.

- F1** Display help topic for the current view
- F2** Save data being edited
- F4** Show list of items to select from
- F5** Abandon changes to the current record (also CTRL+R)

For more keyboard shortcuts, see “Cursor Movement” on page 45.

Ribbon Menu

To reduce mouse clicks, leave the ribbon menu open so you can easily see and access the options available.

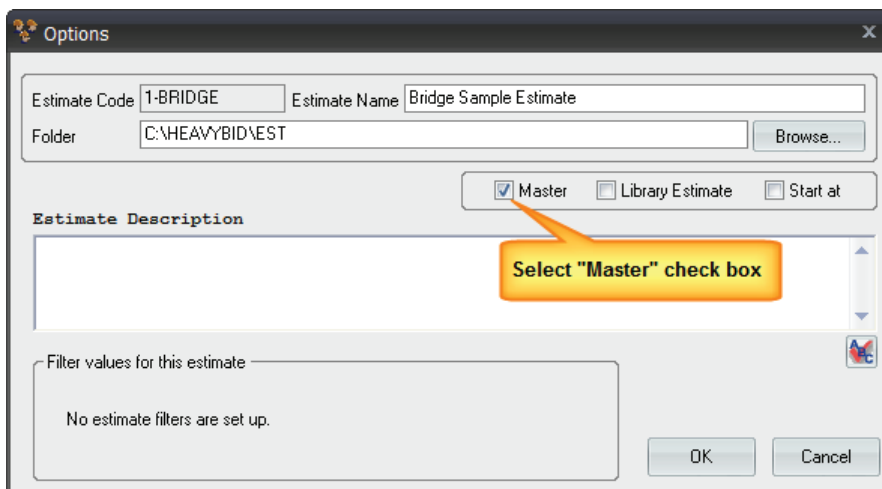
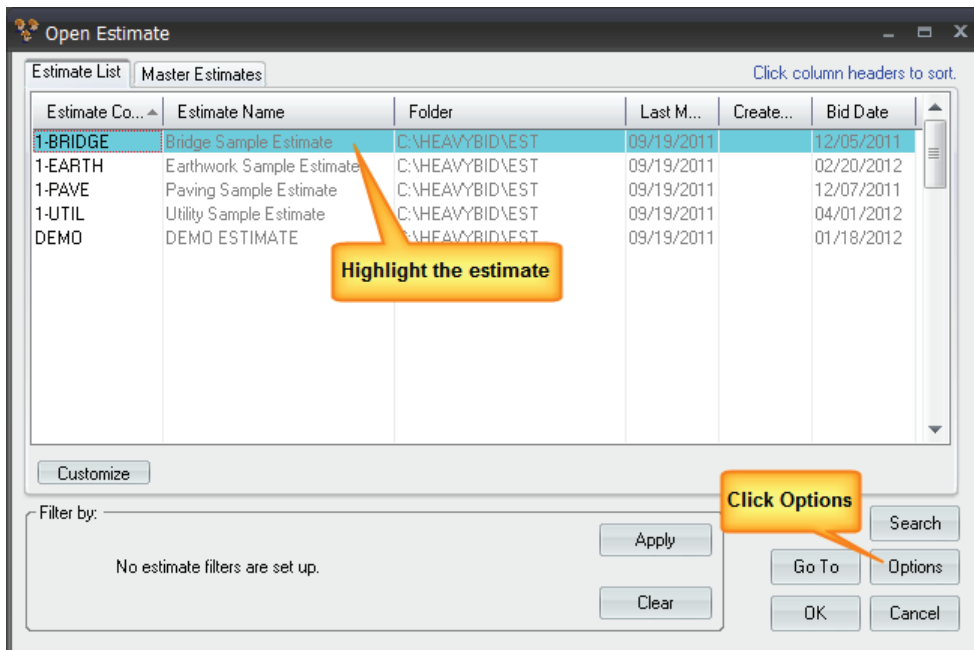


ESTIMATING OVERVIEW

There are two types of estimates in *HeavyBid*: working estimates and master estimates.

- **Working Estimates:** Jobs that you plan to bid on.
 - **Master Estimates:** Templates containing the necessary setup files that your working estimates will be based upon.
- By default, all newly created estimates are listed in the Open Estimate window > Estimate List tab.

To set an existing estimate as a master estimate, do the following:



Labor Setup

Setup tab > Labor



In **HeavyBid**, labor resources are set up to correspond with each specific pay class that your company uses. Typically, specific employees are not set up in **HeavyBid**. Rather, the labor craft is used to estimate the costs of the labor resources. **HeavyBid** allows as many labor resources as desired, but each must be set up individually.

1. On the Setup tab, select Labor. The Labor Setup window opens.
2. Click the Insert Row button, and then enter a labor code that begins with an alpha character.
3. Press the TAB key or use the mouse to move to the Description field. Enter the resource description.
4. Continue in this format to move through the fields and insert the rate, unit (almost always MH for manhours), tax, and fringe. Once these values are entered, tab through the end of the line. When the next line is highlighted, it automatically saves your entered labor resource.

Labor >>	Description	Rate	Unit	Tax % >>	Fringe \$ >>	OT Rule >>	Total
A	ASPHALT LABOR	0.00		0.00	0.000		0.00
ADF	Asphalt Foreman	20.50	MH	19.25	0.000	SAL	24.45
AOP	Asphalt Operator	19.00	MH	19.25	0.000		22.66
ARK	Asphalt Raker	15.50	MH	19.25	0.000		18.48
CA	CARPENTERS	0.00		0.00	0.000		0.00
CARPF	Carpenter Foreman	20.50	MH	19.25	0.000	SAL	24.45
CARPH	Carpenter Helper	16.25	MH	19.25	0.000		19.38
CARPS	Carpenter	18.50	MH	19.25	0.000		22.06
D	DOCKBUILDERS	0.00		0.00	0.000		0.00
DB	Dockbuilder	17.50	MH	19.25	0.000		20.87
DBF	Dockbuilder Foreman	20.00	MH	19.25	0.000	SAL	23.85
FN	FINISHERS	0.00		0.00	0.000		0.00
FNFM	Finisher Foreman	20.50	MH	19.25	0.000	SAL	24.45
FNH	Finisher Helper	15.00	MH	19.25	0.000		17.89

Additional Information on Labor

- Labor is one of the types of resources added into activities when building an estimate.
- In order to be used with crews, a labor craft must use MH (manhours) as its unit.
- By clicking the Tax % and Fringe \$ Headers, you can break out the costs for this burden, or you can simply use a percentage and enter it into the Labor Setup window.
- The estimate’s default overtime rule will be applied for any labor resource that does not have an overtime rule specified. To learn how overtime rules are created and applied, see “Overtime Rule Setup” on page 12.

Overtime Rule Setup

Setup tab > Overtime Rules



Overtime rules are used in **HeavyBid** to create the necessary premium percentage to calculate dollars for overtime hours. Without overtime rule, estimated manhours do not incur overtime costs where applicable. Once an overtime rule is set up and applied to the estimate, **HeavyBid** uses the shifts specified throughout the estimate to help calculate overtime costs in each activity.

1. On the Setup tab, select Overtime Rules. The Overtime Rule Setup window opens.
2. Enter an OT Rule code and a description for the overtime rule.
3. Enter the proper rules for your company's overtime, and then click Save. In the example below, laborers earn time and a half after 8 hours on weekdays, time and a half all day on Saturdays, and double time all day on Sundays.



After clicking Save, your entered information will be cleared from the fields, but it has been saved. To see your entered information again, select the rule from the OT Rule field.

Premium Rate over the Specified Hours per Day.						
	OT Rate 1	Hrs	OT Rate 2	Hrs	OT Rate 3	Hrs
Weekday	1.50	8.00	0.00	0.00	0.00	0.00
Saturday	1.50	0.00	0.00	0.00	0.00	0.00
Sunday	2.00	0.00	0.00	0.00	0.00	0.00

Default Overtime

After creating an overtime rule, specify the default overtime rule used by your company. To do this, select Setup tab > Estimate Information. On the Estimate Information Setup window, select the default overtime rule for your master estimate, and then click Save.

Salaried Overtime

Because salaried employees do not receive compensation for overtime, **HeavyBid** allows you to choose an overtime rule for salaried employees that will adjust their premium percentage, based on the calendar used for the activity.

Additional Information on Overtime Rules

- You can set up as many overtime rules as necessary in an estimate.
- If a labor class does not use the default overtime rule, the correct overtime rule can be selected for the labor class individually from the Labor Setup window.

Calendar Setup

Setup tab > Calendars



For **HeavyBid** to determine overtime hours and shift durations, calendars must be set up and applied to the estimate. **HeavyBid** calculates hours and overtime premiums according to the selected calendar for each activity.

1. On the Setup tab, select Calendars. The Work Week Calendar Setup window opens.
2. Enter a calendar code and a description for the calendar.
3. Enter the total estimated hours worked per shift for each day of the week. This is used in conjunction with overtime rules to calculate the premium percentage for overtime rates.
4. Pay special attention to the Hours/Shift for Production value. Typically, this option is the hour amount for a single shift. It is used to dictate the productivity level of the crew using the calendar. If unsure as to the use of this option, insert the duration in hours of a single shift, as specified in the day table.
5. Click Save. When asked to update estimate with new setup information, select No (this is the master estimate and there is nothing to update).



After clicking Save, your entered information will be cleared from the fields, but it has been saved. To see your entered information again, select the calendar from the Calendar field.

Hours for Premium Calculation							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Shift 1:	10.00	10.00	10.00	10.00	10.00	0.00	0.00
Shift 2:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shift 3:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Additional Information on Calendars

- Calendars are used with overtime rules to calculate overtime premium percentages. This percentage is applied to all hours worked in an activity. A premium percentage is calculated by dividing the number of hours paid by the number of hours worked. The default premium field displays the current premium percentage based on the currently selected overtime rule for the estimate.
- To enter an override premium percentage for use in the estimate, select the Use Override Premium check box. Do not select this option unless it is necessary to change this percentage.
- To compare the premium percentages based on different overtime rules with different calendars, click the Check Premium % button.

Notes

Equipment Setup

Setup tab > Equipment



Equipment Setup is used to set the rental rates, fuel rates, and other operating expenses for equipment. Equipment should be set up similarly to labor in that actual equipment pieces do not need to be entered here, but rather classes of equipment. If you have multiple types of the same piece of equipment (e.g., a D5 dozer), you do not need to insert the equipment in multiple times unless the rental rate for the pieces is drastically different.

1. On the Setup tab, select Equipment. The Equipment Setup window opens.
Equipment resource codes must begin with “8”, after which you can use any alphanumeric combination. As labor must use a unit type of MH (manhours) to be used in a crew, equipment must also use a unit type of HR (hour) to be used in a crew.
2. Link an operator to the piece of equipment. An operator from the labor setup can be specified for a piece of equipment by clicking on the Operator >> column header as you create each new equipment resource.
3. Enter an hourly rental rate and fuel rate. These are broken apart here so you can categorize the dollar amounts correctly.
4. For a more advanced breakdown of equipment operating expenses (EOE), click the Rent Breakdown and EOE Breakdown tabs (Advanced and Comprehensive Systems only).

Equipment >>	Description	Unit	Type	Operator >>	Rent Rate >>	EOE Rate >>	Total Rate
8AC	AIR COMPRESSORS				0.000	0.000	0.000
8AC185	Air Compressor 185 cfm	HR	Inside		15.000	5.000	20.000
8AC365	Air Compressor 365 cfm	HR	Inside		20.000	5.000	25.000
8AP	ASPHALT				0.000	0.000	0.000
8AP1	Asphalt Paver (LG)	HR	Inside	OP3	85.000	34.600	119.600
8AP2	Asphalt Paver (SM)	HR	Inside	OP3	35.000	16.420	51.420
8APBS	Sweeper	HR	Inside	OP5	7.000	2.000	9.000
8APLANT	Asphalt Plant & Equipment	HR	Inside	OPLNT	0.000	0.000	0.000
8APPRW	Road Widener	HR	Inside	OP4	45.000	7.000	52.000
8APPSB	Shuttle Buggy	HR	Inside	OP3	90.000	5.000	95.000
8ARC	Asphalt Reclaimer (w/Teeth)	HR	Outside	OP3	125.000	90.000	215.000
8ARS	Roadway Saw (w/Blades)	HR	Inside	LS	2.500	12.500	15.000
8B	BARGES				0.000	0.000	0.000
8BC050	Crane Barge - 50 Ton	HR	Inside	OP1	71.840	7.430	79.270
8BC100	Crane Barge - 100 Ton	HR	Inside	OP1	112.070	14.310	126.380
8BC200	Crane Barge - 200 Ton	HR	Inside	OP1	204.020	18.430	222.450
8BFD1000	Flat Deck Barge - 1,000 Ton	HR	Inside	OP1	22.990	0.000	22.990
8BFF71020	Flexifloat - 7' x 10' x 20'	HR	Inside		3.160	0.000	3.160
8BFF71040	Flexifloat - 7' x 10' x 40'	HR	Inside		5.750	0.000	5.750
8BH	BACKHOES				0.000	0.000	0.000
8BH416	CAT 416 Backhoe	HR	Inside	OP3	14.200	4.250	18.450

Additional Information on Equipment

- Use a consistent numbering scheme for your equipment codes. For example, use the same starting characters for similar kinds of equipment so that they group together in equipment lists (e.g., 8D for dozers, 8L for loaders, 8E for excavators). This will organize your equipment selection lists.
- The Rent Rate and the Fuel Rate are added together into the Total Rate. If you have additional operational expenses, simply add them into the Fuel Rate value or use the EOE Breakdown tab to break these costs into sub-categories.

Crew Setup

Setup tab > Crews



Crews are one of the most powerful tools in *HeavyBid*. By using crews, you can increase efficiency by minimizing the need to build labor and equipment combinations. Prepare them in advance so that when you begin estimating, you can quickly input labor and equipment cost.

1. On the Setup tab, select Crews. The Crew Setup window opens.
2. In the Crew field, enter a code up to six characters in length.
3. In the Desc field, enter the crew description.
4. Click the Equip and Labor buttons to select labor and equipment resources for this crew.

If you select an equipment piece with an attached operator, you will be prompted to pull in the operator as a labor resource, thereby minimizing the time required to build a crew.

5. To attach a subcontractor resource to the crew, click the Resource column header and select the resource from the list.

Resource >>	Description	Pieces	Rent %	EOE %	Hour A...
8D6	CAT D6 Dozer	1.00	100	100	0.00
8D8	CAT D8 Dozer	1.00	100	100	0.00
8EX350	Cat 350 Excavator (28)	1.00	100	100	0.00
8LT953	CAT 953 Track loader	1.00	100	100	0.00
8TDD	Truck dump 16 CY dbl axle	3.00	100	100	0.00
8TPU	Pickup truck	1.00	100	100	0.00
LF	Labor Foreman	1.00	0	0	0.00
LG	General Laborer	2.00	0	0	0.00
OP1	Operator - Crane, Exc	1.00	0	0	0.00
OP4	Operator - Dozer, Ldr	3.00	0	0	0.00

Additional Information on Crews

- When used in an estimate, crews allow you to modify hours and productivity for several pieces of labor and equipment at once.
- Only create your most commonly used crews. It is not necessary to create a crew for every possible crew combination because you can modify any crew for specific use in a single activity. This benefit allows flexibility and creativity when working to build your estimate.
- Labor and equipment must be set up before crews can be created.

Worker's Comp Setup

Setup tab > Worker's Comp



Use the Worker's Comp Setup window to enter the worker's comp codes and percentages that you need for your estimates. These codes can later be assigned to activities in the estimate. The worker's comp cost, calculated based on the labor cost in the activity, will then be included in the total cost for that activity.

1. On the Setup tab, select Worker's Comp. The Worker's Comp Setup window opens.
2. For each worker's compensation code that you need to account for, provide its code, description, and the percentage defined for the worker's compensation.
3. A field for a marine upshift factor is available here as well, giving you further flexibility to designate specific activities in the estimate as marine work and increasing the worker's compensation by this factor.

WC Code...	Description	Percent
TX5222	Bridges / Concrete	18.550
TX5403	Carpentry	20.130
TX5606	Supervisors	4.140
TX6210	Paving	8.250
TX6217	Grading	13.630
TX6229	Drainage	13.340
TX6319	Water & Sewer	14.400

Insert Row Delete Row

Marine Upshift:

Although not mandated, the ideal code structure is the following: Enter the two letter state/province abbreviation followed by the appropriate state/province WC code of up to 4 characters.

Close

Completion of the Master Estimate

Once all items are entered into the master estimate, it is automatically saved and ready for immediate use. New estimates are now created based on the data entered into the master estimate, eliminating multiple instances of entry into the system.

After the master estimate setup is complete, it typically is not modified unless a change needs to be made to the setup information. Changes that should be made in the master estimate include rate increases for labor and equipment and crew restructuring. Never create biditems, activities, or other types of estimate-specific information in the master estimate unless that information will be used in all future estimates.

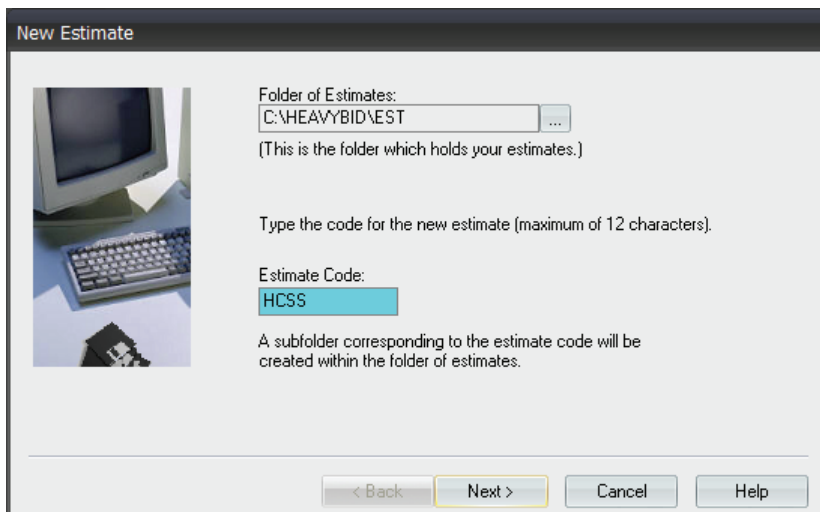
Note that if you create estimates and then modify the master estimate afterwards, your changes do not affect existing estimates. Your changes only affect future estimates that are created from the master. If you need to make mass changes to rates, crews, labor, equipment, etc., call your HCSS Support Team for assistance.

Creating a New Estimate

Now that the master estimate is established, new working estimates can be created. Working estimates are defined as actual estimates that contain cost and price information that will be submitted to an owner.

1. On the File tab, select New > New Estimate. The New Estimate wizard opens.
2. Enter an estimate code of up to eight characters. This is the code *HeavyBid* uses to sort estimates; therefore, we recommend that you establish a coding method in order to best define your estimates.

In almost all instances, you should *not* change the Folder of Estimates. This changes the directory in which estimates are stored and can cause much confusion and problems if used incorrectly. The default location should be used at all times except in extremely rare instances.



New Estimate

Folder of Estimates:
C:\HEAVYBID\EST ...
(This is the folder which holds your estimates.)

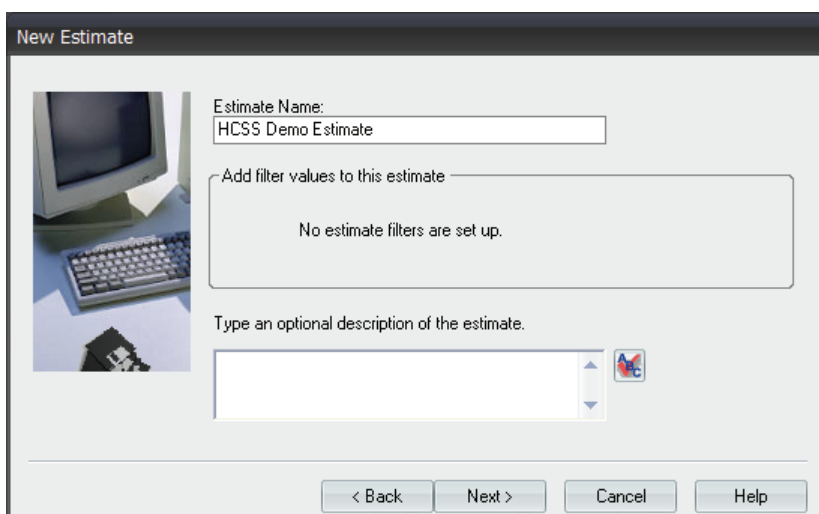
Type the code for the new estimate (maximum of 12 characters).

Estimate Code:
HCSS

A subfolder corresponding to the estimate code will be created within the folder of estimates.

< Back Next > Cancel Help

3. Click the Next button to proceed.
4. Enter an estimate name to provide a better description of your estimate, and then click Next.



New Estimate

Estimate Name:
HCSS Demo Estimate

Add filter values to this estimate

No estimate filters are set up.

Type an optional description of the estimate.

< Back Next > Cancel Help

Estimate Entry – Tree View

Estimate tab > Tree View

The Estimate Entry – Tree View screen is the recommended method of cost entry for practicality and ease of use. A list of biditems, activities, and resources are available on the left side, while specific activity and resource details can be entered at the right. This layout makes the Tree View screen a very powerful element in *HeavyBid*.

Tree View Overview

In the Tree View, you can do the following:

- Create biditems on the fly by right clicking on the left pane and selecting Add Biditem option.
- Create activities directly on the screen or by clicking the Add Activities button at the bottom-left.
- Add resources directly into the Resource Detail tab, or click the Select Labor/Equipment/Material icons at the right to pull in resources.



The costs within biditems are contained within activities. A biditem can contain as many activities to break down the work of the biditem as necessary. Within each activity resides the actual resources, which are the cost of the estimate. Therefore, creating and using activities is the way to build cost within the estimate.

View of Estimate

- HCSS Demo Estimate
 - 10 : MOBILIZATION
 - 20 : INSTALL & MAINTAIN EROSION
 - 30 : CLEAR & GRUB SITE
 - 100002 - Clear & Grub - Medium
 - 100003 - Clear & Grub - Light
 - 40 : ROCK REMOVAL
 - 50 : REMOVE & STOCKPILE TOPSOIL
 - 60 : REMOVE UNSUITABLE CLAY & D
 - 70 : BULK EXCAVATE & PLACE AS FIL
 - 80 : EXCAVATE RETENTION POND
 - 90 : REPLACE TOPSOIL & ROUGH GR
 - 100 : RC PIPE (CL IV) (24 IN)
 - 110 : RC PIPE (CL IV) (30 IN)
 - 120 : RC PIPE (CL IV) (36 IN)
 - 130 : FLARED END SECTION - ALL DIA
 - 140 : INLET (COMPLETE) (TY A)
 - 150 : INLET (COMPLETE) (TY C)
 - 160 : FINE GRADE & FINISH SUBGRAD
 - 170 : INSTALL 9" CRUSHED STONE BA
 - 180 : MILL & REMOVE EXISTING A/C
 - 190 : HOT MIX ASPHALT PAVING
 - 200 : PAVEMENT MARKINGS

Biditem Information

Biditem	Description	Takeoff Quantity	Unit	Cost
30	CLEAR & GRUB SITE	38.750	AC	\$69,739.18
Client#	105 2010	Est. Init.	Type D	Bid Quan 38.750
			U.Cost	\$1,799.721

Activity Information

Activity	Description	Quantity	Unit	Cost
100002	Clear & Grub - Medium	38.75	AC	\$51,732.31
			U.Cost	\$1,335.027

Activity Productivity Information and Options



Crew	CLM	Desc	Medium Clearing Crew	Cal	510	WC	TX6217
Prod	US	Rate	2.5000	Eff%	0.00	Crew Hrs	155.0000
				Hrs/Shift	10.00		
Manhours	1,085.000	Units/Hr	0.2500	Un/Shift	2.5000		<input type="checkbox"/> Unreviewed
Unit/MH	0.0357	\$/Unit	1,335.0274	Shifts	15.5000		<input type="checkbox"/> Non-Add
							<input type="checkbox"/> Marine

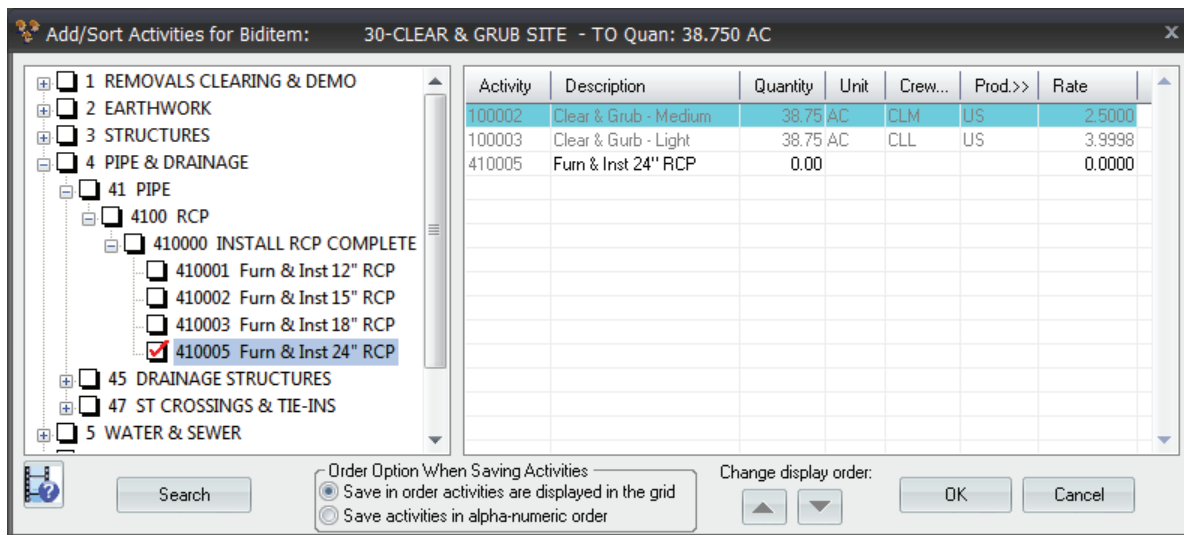
Resource Detail

Resource>>	Description	Quantity	Unit	Unit Cost	%	Pcs/Wste	Total
8D6	CAT D6 Dozer	155.00	HR	36.1200	100.00	1.00	\$5,598.60
8LT953	CAT 953 Track loa	155.00	HR	40.6700	100.00	1.00	\$6,303.85
8TDD	Truck dump 16 Cy	310.00	HR	36.1000	100.00	2.00	\$11,191.00
8TPU	Pickup truck	155.00	HR	5.6600	100.00	1.00	\$877.30
LF	Labor Foreman	155.00	MH	18.0000	100.00	1.00	\$4,304.11
LG	General Laborer	310.00	MH	11.5000	110.00	2.00	\$6,397.65
OP4	Operator - Dozer, L	310.00	MH	16.0000	110.00	2.00	\$8,417.68
TDH	Truck Driver - Hea	310.00	MH	16.5000	110.00	2.00	\$8,642.12

Add/Sort Activities

To add or sort activities, right-click on a biditem or click the Add Activities button at the bottom-left. In the Add/Sort Activities screen, you can do the following:

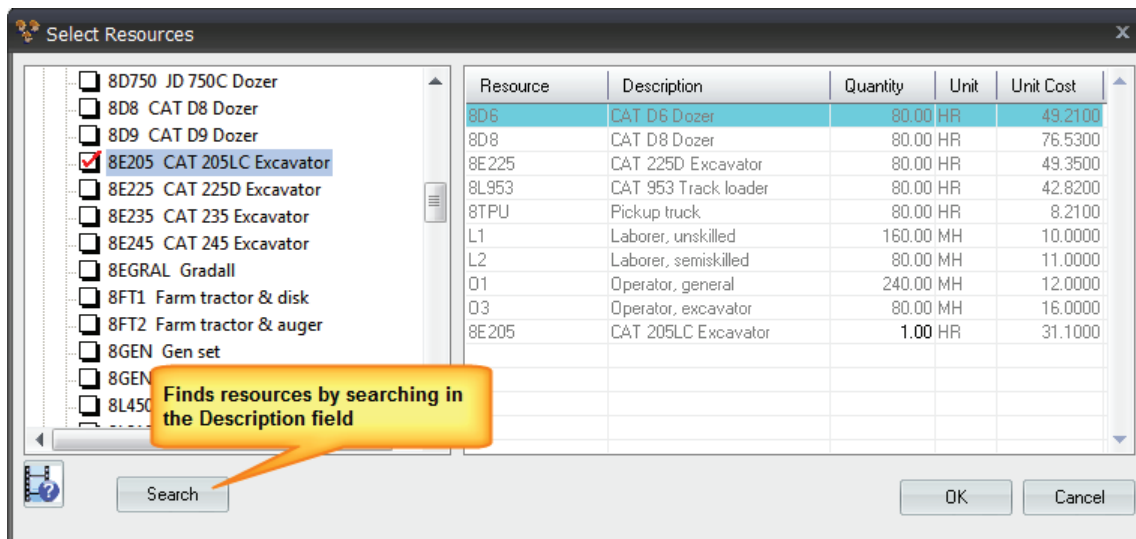
- Create multiple activities on the fly or pull them in from the activity codebook.
- Change the order of activities. To change the order, do the following:
 1. At the bottom of the screen, ensure the “Save in order activities are displayed in the grid” option is selected.
 2. In the grid, click on the activity that you want to reorder.
 3. At the bottom of the screen, click the   arrow buttons to reorder the highlighted activity.



Select Resources

To select resources for an activity, select the activity in the left pane. At the right, click the Resource >> column header on the Resource Detail tab. In this screen, you can do the following:

- Pull in multiple resources at once.
- Select from local or system-wide resources, as well as resources already used in the estimate.



Modify Crew



Use the Modify Crew screen to customize the crew in a specific activity. It is accessed by clicking the crew icon at the right.

Modify Crew for Activity 30 100002 - Clear & Grub - Medium

Crew	Description	Labor	Equip.	Actv Quan	AC
CLM	Medium Clearing Crew	7.00	5.00	38.75	
Productivity Rate	Crew Hours	Calendar	Hrs/Shift	Percent	Cost/Unit
US	2.5000	155.0000	510	10.00	0.00
					Weeks
					3.1

Full Crew

Resource >>	Description	Pieces	Rent %	EOE %	Hour Adj.	Base Rate
8D6	CAT D6 Dozer	1.00	100	100	0.00	36.1200
8LT953	CAT 953 Track loader	1.00	100	100	0.00	40.6700
8TDD	Truck dump 16 CY dbl axle	2.00	100	100	0.00	36.1000
8TPU	Pickup truck	1.00	100	100	0.00	5.6600
LF	Labor Foreman	1.00	0	0	0.00	18.0000
LG	General Laborer	2.00	0	0	0.00	11.5000
OP4	Operator - Dozer, Ldr	2.00	0	0	0.00	16.0000
TDH	Truck Driver - Heavy	2.00	0	0	0.00	16.5000

Buttons: Insert Row, Delete Row, Copy to Crew Setup, Close

Changes here only affect the crew in the current activity, not crews in other activities.

In the Modify Crew screen, you can do the following:

- Use the Pieces column to add, delete, or modify the number of crew resources.
- Change the productivity type, productivity rate, and crew hours. Doing so automatically recalculates all of the crew's resources' quantities.
- Use the Hour Adj. column to change labor resources without affecting the productivity rate. For example, use it to add an extra hour at the end of each shift for your foreman to complete paperwork.

Notes

Handling Material and Subcontractor Quotes

Subsystems tab > Quotes



Use the Quote Subsystem to track all material and subcontractor quotes you receive during the bidding process. For companies that choose to track quotes outside of *HeavyBid*, see “Changing Subcontractor & Material Costs Without Using the Quote System” on page 32.

To properly use the *HeavyBid* Quote system, you must complete the following steps:

1. Add quote folders
2. Add resources to quote folders
3. Add vendors to quote folders
 - a. Enter vendor prices
 - b. Select a vendor

Add Quote Folders

1. In the Quote Summary screen, click the Quote Sheet link at the right. The Quote Sheet window opens.
2. In the Quote Folder field, enter a new quote folder code.
3. Tab to the next field, and then enter a description for the quote folder.
4. Select whether the quote folder will contain subcontract items or materials.
5. Click in the grid. The quote folder is now added to your estimate.

The screenshot shows the 'Quote Sheet' window with the following fields and annotations:

- Quote Folder:** ASPHALT (with a callout: **Type a folder code**)
- Description:** Asphalt Folder (with a callout: **Type a description**)
- Estimator:** (empty)
- Vendor:** (empty)
- Material Selection:** Radio buttons for Subcontract and Material (with a callout: **Select "Subcontract" or "Material"**)
- Selected Vendor:** (empty)
- Price Options:** Radio buttons for Extended Prices and Both Prices
- Grid:** A table with columns: Resource >>, Description, Quan, Unit, Plug UP. The first row has values 0.00 and 0.0000.

TIP To see other ways to add quote folders, press the F1 key while in a quote sheet. In the How To section, select the “Adding Quote Folders to an Estimate” option.

Notes

Add Resources to Quote Folders

1. In the Quote Sheet window, select a quote folder in the Quote Folder field.
2. Click the Add Resources to Quote Folders link to open the Select Resources for Quote Folder window.
3. Click the box to the left of the desired resource(s). This places a check mark next to the resource and pulls every occurrence of the selected resource in your estimate into the folder.
 - To pull every occurrence of a resource only within specific biditems, click [+] at the left of the desired resource to expand the tree, and then click the boxes of desired biditems.
 - To pull every occurrence of a resource only within specific activities, click [+] at the left of the biditem to expand the tree, and then click the boxes of desired activities.
4. Click OK.

Quote Sheet

Quote Folder: ASPHALT | Asphalt Folder | Estimator: | Subcontract | Selected Vendor: | Material

Note: | Add Resources to Quote Folder

Resource >> | Description

Click "Add Resources to Quote Folder" link

Option 1: Select all instances of this resource to add to the folder

Resource	Quantity	Unit	Unit Price
MATERIALS	1,400.00	LF	\$0.000
2AC030 Ty C Asphalt	47,895.00	TON	\$21.880
65 HOT MIX ASPH (TY D) (BASE)	35,450.00	TON	\$21.880
661201 Furnish & Haul A/C	35,450.00	TON	\$21.880
66 HOT MIX ASPH (TY C) (SURF)	12,445.00	TON	\$21.880
661501 Furnish & Haul A/C	12,445.00	TON	\$21.880
2AC040 Ty D Asphalt	47,895.00	TON	\$20.560
65 HOT MIX ASPH (TY D) (BASE)	35,450.00	TON	\$20.560
661201 Furnish & Haul A/C	35,450.00	TON	\$20.560
66 HOT MIX ASPH (TY C) (SURF)	12,445.00	TON	\$20.560
661501 Furnish & Haul A/C	12,445.00	TON	\$20.560
2DUMP DUMP FEE	4,950.00	CY	\$8.000
4GRASS Grassing Sub	88,398.00	SY	*****
hour	28.14	HR	\$50.000

Option 2: Select individual instances of the resources to add to the folder

@ = In Current Folder | * = In Another Folder | Go To | Clear Selections | OK | Cancel

Extended Prices | Both Prices | Pull In (Multiple Vendors)



To see other ways to add quote folders, press the F1 key while in a quote sheet. In the How To section, select the "Adding Quote Folders to an Estimate" option.

Notes

Add Vendors to Quote Folders

1. In the Quote Sheet window, select a quote folder in the Quote Folder field.
2. In the Vendor field, you can either create a new vendor or select an existing one.

Create a New Vendor

1. Enter a code of up to 12 characters for the vendor (e.g., "ACMEPAVE01" for Acme Paving)
2. Click the Add Vendor button to add the vendor to the grid below.



Be consistent with your naming conventions. This will make it easier to find the vendor later when performing searches. This is especially important if you plan on later making this vendor a system-wide one using the Copy Local Vendors to System-Wide Vendors option.

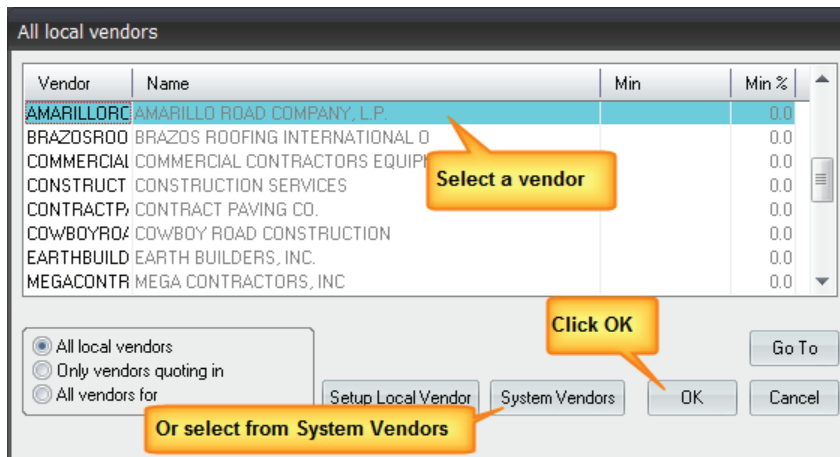
Add an Existing Vendor

1. In the Quote Sheet window, select a quote folder in the Quote Folder field.
2. Click the [...] selection button in the Vendor field to select from a list of vendors.

For those using the Advanced and Comprehensive versions of **HeavyBid**, this opens the System-Wide Contacts window by default. Either select from this list or click the Local Vendors button.

For people using the Basic version of **HeavyBid**, this opens the All Local Vendors window.

3. Click on the desired vendor, and then click OK to pull it into the folder and return to the Quote Sheet screen.



Notes

Add Multiple Vendors at Once (Advanced and Comprehensive Only)

1. Click the Pull In Multiple Vendors link.
2. In the Add column, select the check box of each desired vendor. Or to select all vendors, click the Select All button.
3. Click OK.



To narrow down the selection list, select a Product or Region code in the Optional Filters section. (You must first have Product/Region Codes set up in order to filter to them.)

4. Add the vendor prices in the appropriate fields.
5. Click the “Select the Vendor” check box for the desired vendor.

Click "Pull in Multiple Vendors"

Select vendors you want to add

Click OK


Add	Region	Code	Name	City	Min	Vendor Type ...
<input type="checkbox"/>		4XEINC	4XE INC.			
<input type="checkbox"/>		AAMISSILDI	A. A. MISSILDINE			
<input checked="" type="checkbox"/>		AARONCONCR	AARON CONCRETE CONTRAC			
<input checked="" type="checkbox"/>			DUCTIC			
<input type="checkbox"/>			AND S			
<input type="checkbox"/>		ACMEBRIDGE	ACME BRIDGE COMPANY, INC.			
<input checked="" type="checkbox"/>		ADMIRALCON	ADMIRAL CONSTRUCTION CO			
<input type="checkbox"/>		AJCOMMERC	AJ COMMERCIAL SERVICES, IN			
<input type="checkbox"/>		AKGILLIS&S	A. K. GILLIS & SONS, INC.			
<input type="checkbox"/>		ALAMOCONST	ALAMO CONSTRUCTION			
<input type="checkbox"/>		ALHELMCAMP	A. L. HELMCAMP, INC.			
<input checked="" type="checkbox"/>		ALLAMERICA	ALL AMERICAN SERVICES			
<input type="checkbox"/>		ALLCOLTD	ALLCO, LTD.			



The quote subsystem can be automated to create folders, add resources, and pull in vendors instantaneously. For more information, press F1 for HeavyBid help, or call HCSS Technical Support.

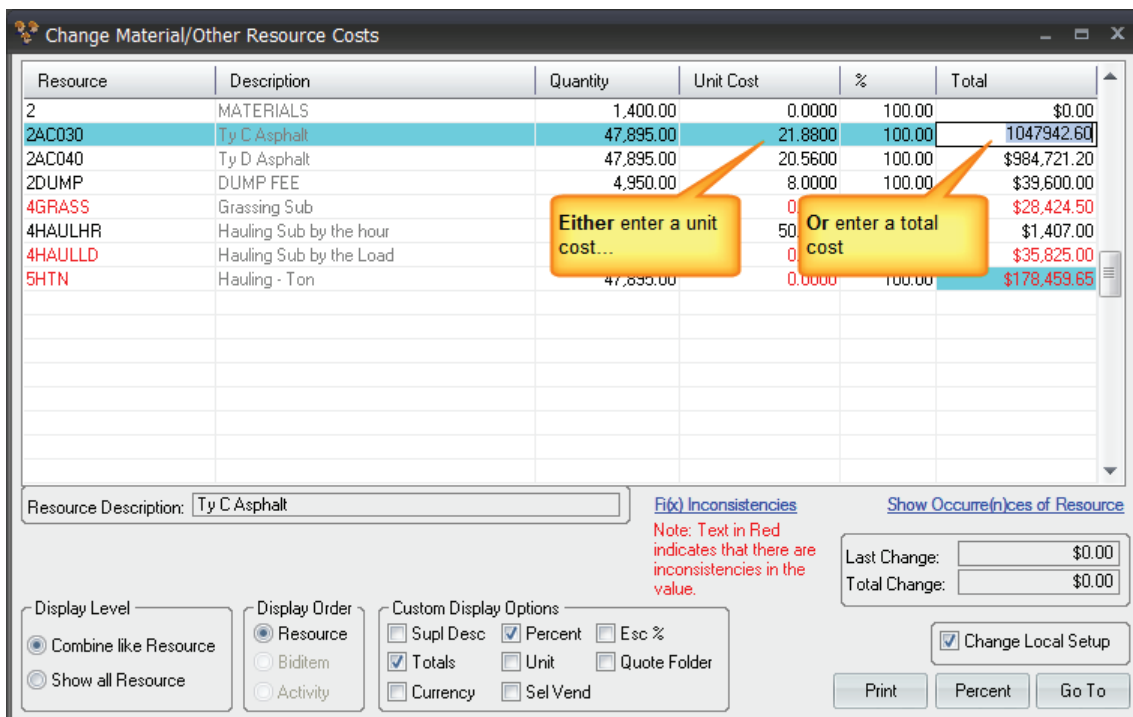
Changing Subcontractor & Material Costs Without Using the Quote System

Edit tab > Change Estimate Data > Change Material/Other Resource Costs

Use the Change Material/Other Resource Costs window to review and modify costs for materials and other resources within the estimate (not including labor or equipment resources). Access the window through the Edit tab or by clicking this  icon on the *HeavyBid* toolbar.

You can change the cost of material/other resources in a variety of ways:

- Directly change the unit cost
- Directly change the total cost
- Change the sales tax percentage (the % column)
- Click the Percent button to change the unit cost by a specific percentage



Resource	Description	Quantity	Unit Cost	%	Total
2	MATERIALS	1,400.00	0.0000	100.00	\$0.00
2AC030	Ty C Asphalt	47,895.00	21.8800	100.00	1047942.60
2AC040	Ty D Asphalt	47,895.00	20.5600	100.00	\$984,721.20
2DUMP	DUMP FEE	4,950.00	8.0000	100.00	\$39,600.00
4GRASS	Grassing Sub	0	0		\$28,424.50
4HAULHR	Hauling Sub by the hour	50	0		\$1,407.00
4HAULLD	Hauling Sub by the Load	0	0		\$35,825.00
5HTN	Hauling - Ton	47,895.00	0.0000	100.00	\$178,459.65

Resource Description: Ty C Asphalt

Fix Inconsistencies
Note: Text in Red indicates that there are inconsistencies in the value.

Show Occure(n)ces of Resource

Last Change: \$0.00
Total Change: \$0.00

Display Level: Combine like Resource Show all Resource

Display Order: Resource Biditem Activity

Custom Display Options: Supl Desc Percent Esc % Totals Unit Quote Folder Currency Sel Vend

Change Local Setup

Print Percent Go To

Notes

Summarizing Costs and Finalizing Prices

Bid Summary

Summary tab > Summary



Markup, addons, bonds, and indirect spreads are handled in the Bid Summary screen. Access this screen by selecting Summary tab > Summary or by clicking the summary icon on the toolbar.

- On the initial Totals tab, markup can be applied globally to the estimate based on cost type.
- Addons and bonds have their own respective tabs that allow you to set up and apply them in different ways.
- The Spread Overrides tab provides many different methods to change the way **HeavyBid** spreads costs across direct biditems.

Bid Summary is one of the most important features in the system because it summarizes all cost in the estimate and then creates markup to spread back to direct biditems. It also spreads all other costs not categorized as direct cost and generates a balanced bid price for the estimate.

It is important to understand that by default, **HeavyBid** creates the totals in this screen based upon takeoff quantity in the estimate. This is the true cost in the estimate, and therefore is used as the basis for all markups, addons, bonds and indirect spreads. As a result, the total dollar amount shown in the lower right is based on takeoff quantity.

	Cost Basis	Markup %	Markup
Labor	352,112	9.71	34,190
Burden	181,620	9.71	17,635
Perm Matl	192,231	9.71	18,666
Const Matl	46,588	9.71	4,524
Sub	897,047	9.71	87,103
Eq Op. Exps	143,632	9.71	13,947
Co Equip	441,125	9.71	42,833
Rented Eqp	8,143	9.71	791
Trucking	128,066	9.71	12,435
Misc2	0	9.71	0
Misc3	0	9.71	0
Overrides	0	0.00	0
Use Avg:	2,390,564	9.71	232,124

	Cost	Markup	Total
Direct	2,390,563	232,124	2,622,687
Indirect	0	0	0
Addons	83,670	0	83,670
Bond	13,133	0	13,133
SubTotal	2,487,366	232,124	2,719,490
Pass Through	0	0	0
Total	2,487,366	232,124	2,719,490

Additional Information on Bid Summary

- Use this screen to set the markup for labor, equipment, materials, etc. in the bid and decide how the markup, indirect costs, and addon/bond costs are spread.
- On the Totals tab, use the Standard Spreads section to select the method for each type of spread for indirect, markup, and addon/bond dollars. This becomes the basis upon which **HeavyBid** spreads those costs.
- After making changes to the cost in the bid, it is important to rerun the bid summary and/or spread. The Run Bid Summary and Run Spread buttons are bolded when a rerun is required.

Standard Markup in Bid Summary

- The Cost Basis, Markup %, and Markup amounts are displayed for each type of cost and for the entire job.
- You can change the Markup % as necessary.

	Cost Basis	Markup %	Markup
Labor	352,112	9.71	34,190
Burden	181,620	9.71	17,635
Perm Matl	192,231	9.71	18,666
Const Matl	46,588	9.71	4,524
Sub	897,047	9.71	87,103
Eq Op. Exps	143,632	9.71	13,947
Co Equip	441,125	9.71	42,833
Rented Eqp	8,143	9.71	791
Trucking	128,066	9.71	12,435
Misc2	0	9.71	0
Misc3	0	9.71	0
Overrides	0	0.00	0
Use Avg: <input type="checkbox"/>	2,390,564	9.71	232,124

Standard Spreads in Bid Summary

- Spread instructions specify how to distribute indirect, markup, and addon/bond costs.
- Summarizing and spreading determines the “balanced” prices for the bid.
- These defaults can be overridden in the Spread Overrides tab. Biditems that do not have their spread instructions overridden follow the instructions set here with the remaining dollars.

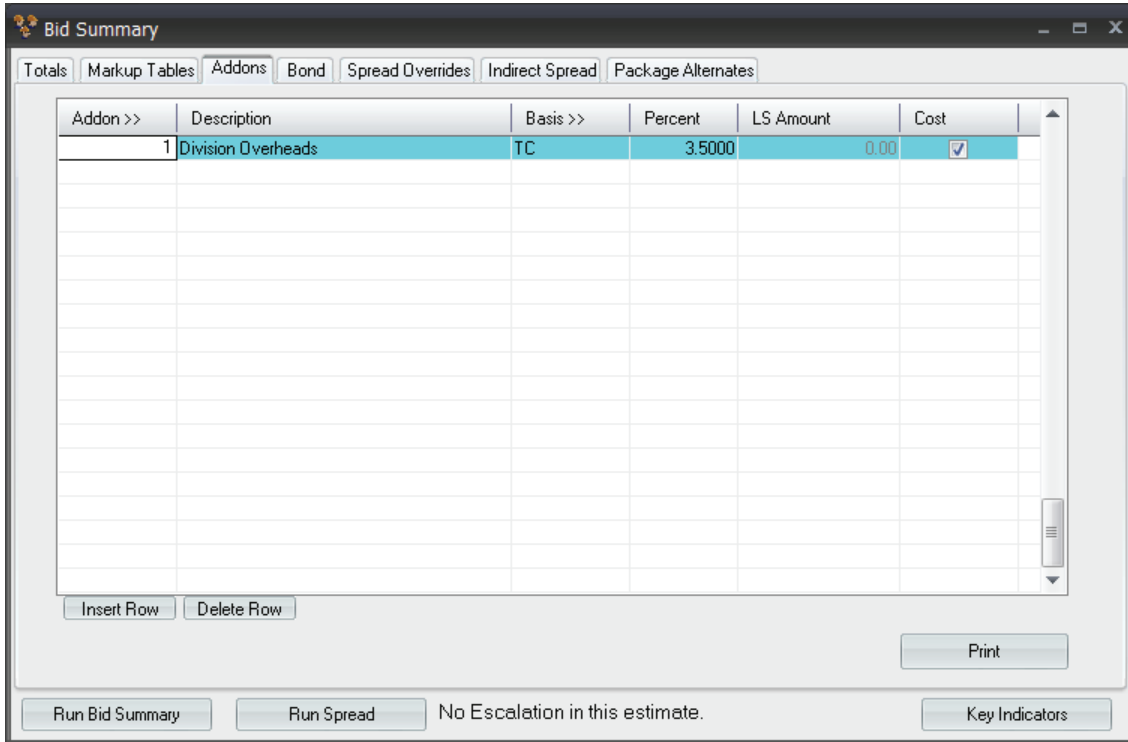
Standard Spreads	
Indirect Spread:	Total
Markup Spread:	Markup%
Addon/Bond Spread:	Total

For details and examples of each standard spread option, press F1 to open *HeavyBid* help and search for “Standard Spreads” on the Index tab.

Notes

Addons Tab in Bid Summary

- Addons are used to add miscellaneous cost or markup to the bid based upon all or part of the dollars in the estimate. Click the Basis >> column header to specify the basis for the addon.
- To record the addon as cost for reporting purposes, select the Cost check box; otherwise, the additional dollars are recorded as markup.



Notes

Bond Tab in Bid Summary

Use the Bond tab to do the following:

- To create a new bond table, enter the name in the Table field and provide bond table information.
- To view or modify an existing bond table, enter the name in the Table field or click the [...] selection button to pull from a list. Modify the description and Bond Table information as necessary.
- In the Selected Bond Table field, click the [...] selection button to choose a table. Your selection will also appear at the bottom-left of the Totals tab.
- To spread the bond to a single biditem, select the biditem in the Bond Item field.



The bond table displayed in the Bond tab may not be the selected bond table; rather, it is the current bond table that is open for editing.

Bid Summary

Totals Markup Tables Addons **Bond** Spread Overrides Indirect Spread Package Alternates

Table: [...]

Desc:

Bond Table	
	Rate per 1000
First: <input type="text" value="100,000"/>	<input type="text" value="6.00"/>
Next: <input type="text" value="400,000"/>	<input type="text" value="5.25"/>
Next: <input type="text" value="2,000,000"/>	<input type="text" value="4.75"/>
Next: <input type="text" value="2,500,000"/>	<input type="text" value="4.25"/>
Next: <input type="text" value="2,500,000"/>	<input type="text" value="4.00"/>
Remainder:----->	<input type="text" value="4.00"/>
Time Threshold 1 <input type="text" value="24"/>	Extended Time % 1 <input type="text" value="1.0000"/>
Time Threshold 2 <input type="text" value="0"/>	Extended Time % 2 <input type="text" value="0.0000"/>

Selected Bond Table: [...]

Bond Item: [...]

Job Length (Months)

Run Bid Summary Run Spread No Escalation in this estimate. Key Indicators

Notes

Bid Pricing

Summary tab > Pricing



After summarizing the estimate in Bid Summary, **HeavyBid** takes the totals and provides a place to make final changes to the bid prices in the Bid Pricing Screen. Access this screen by selecting Summary tab > Pricing or by clicking the Bid Pricing icon on the tool bar.

Here, an estimator can review and change bid prices, make last minute adjustments, review statistics of the estimate, and much more. The dollars spread by the bid summary process can be changed and re-spread manually in this screen per the estimator’s liking.

The screenshot shows the 'Bid Pricing' window with the following data:

Biditem >>	Description	Bal Price	Bid Price	Bid Total	Status >>
10	MOBILIZATION	176,886.60	178,564.29	178,564.29	U
20	INSTALL & MAINTAIN EROSION CONTROL	22,501.73	22,501.73	22,501.73	
30	CLEAR & GRUB SITE	2,047.35	2,047.35	79,334.81	
40	ROCK REMOVAL	18.67	18.67	474,404.70	
50	REMOVE & STOCKPILE TOPSOIL	2.66	2.66	33,117.00	
60	REMOVE UNSUITABLE CLAY & DISPOSE	7.71	7.71	172,973.85	
70	BULK EXCAVATE & PLACE AS FILL	2.32	2.32	474,440.00	
80	EXCAVATE RETENTION POND	4.20	4.20	316,680.00	
90	REPLACE TOPSOIL & ROUGH GRADE	2.73	2.73	33,988.50	
100	RC PIPE (CL IV) (24 IN)	32.14	32.14	11,570.40	
Totals:				2,721,376.26	

Summary Statistics:

- Client #: 000 1000
- Biditem: 10
- Bid Quan: 1.000 LS
- T.O. Quan: 1.000
- Dir UCost: 155,491.910
- Markup% (Cost): 10.369
- Estimated Cost: 2,487,366.02
- Pass Through Cost: 0.00
- Balanced Total: 2,719,489.72
- Adjustments: 0.00
- Pass Through Adj: 0.00
- Desired Bid: 0.00
- Actual Markup (Bid): 234,010.24
- Markup% on Sales (Bid): 8.60
- Markup% on Cost (Bid): 9.41
- Actual Markup (TO): 234,010.24
- Markup% on Sales (TO): 8.60
- Markup% on Cost (TO): 9.41
- Selected Bond Table: A
- Minority Goal: 19.00% \$ 517,061.49
- Minority Current: 15.69% \$ 427,066.97
- Bid Total: 2,721,376.26
- Net Diff from Balanced Bid: 1,886.54

Bid Pricing Status Types

The status column indicates the current bid pricing status for each biditem. The different status types are as follows:

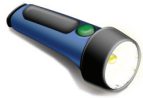
- Unbalanced (U):** The bid price is different than the system-generated balanced price.
- Frozen (F):** The price is “frozen” and cannot be changed. Freeze by entering “F” in the Status column, or unfreeze by deleting the “F”. You can also click the Freeze button to freeze and unfreeze items.
- Closing Account (C):** The biditem is a closing account and can receive adjustment amounts. Set a biditem to a closing account by entering “C” in the Status column or by clicking the Closing button.

Reviewing the Estimate

Once the cost entry portion of building the estimate is complete, it is important to review the estimate to verify the data in the estimate. This can be performed in multiple ways, including the use of exhaustive reports and checks. One detailed area of review is the Estimate Review screen.

Estimate Review

Query tab > Estimate



The Estimate Review screen provides many different checks on different levels throughout *HeavyBid*. Biditems, activities, and resources are all examined in detail to provide you with the most accurate and beneficial information.

By default, *HeavyBid* alerts you to items that may be a problem by highlighting the respective field with a yellow background. This does not always indicate a problem, but indicates an item that is worth investigating to make sure the estimate contains the data you need.

To view the details of any indicator on the Estimate Review screen, do the following:

1. Click the selection button next to the indicator to view a list of items and their locations in the estimate.
2. On the list, click the Create CheckList and Review Items button. This creates a checklist to analyze the details within the Estimate Entry – Tree View. You can cycle through the list using the Next button on the toolbar.

The screenshot shows the 'Estimate Review' window with the following data:

Category	Value	Category	Value
Labor:	352,111.60	Total Labor:	533,731.48
Burden:	181,619.88	Total Man Hours:	17,850.98
Perm Matl:	192,230.55	Total Equipment:	592,900.44
Const Matl:	46,587.50	Total Tax:	0.00
Sub:	897,047.10	Total Escalation:	0.00
Eq. Op Exp:	143,631.65	No Escalation in this estimate.	
Co. Equip:	441,125.49	Holding Accounts:	
Rented Eqp:	8,143.30	Total:	0.00
Trucking:	128,066.40	Calculated:	0.00
Misc2:	0.00	As Of Summary:	0.00
Misc3:	0.00		
Cost Total by adding			
Resources:	2,390,563.47	Bid Summary Cost Total:	2,390,759.51
		Difference:	196.04

Summary Last Run on 03/04/2008 at 12:26 AM

Tab Last Computed on: 09/19/2011 3:28 PM

Buttons: Recompute, Print

Reports

Reports tab



HeavyBid provides many reports based on cost data, price data, estimate setup information, or all of these items together. Versatile reporting options give you the ability to view the information that helps you estimate more precisely. Most reports can be accessed on the Reports tab.

HeavyBid reports are grouped as follows:

- Cost Reports
- Summary Reports
- Quote System Reports
- Cash Flow Reports
- Vendor/Business Contact Reports
- Estimate Resource Reports
- System Resource Reports

Examples of two major reports are shown here.

Bid Pricing Report

01/16/2008	19:10				
000002	HCSS DEMO ESTIMATE				

		BID TOTALS			
<u>Biditem</u>	<u>Description</u>	<u>Quantity</u>	<u>Units</u>	<u>Unit Price</u>	<u>Bid Total</u>
10	MOBILIZATION	1.000	LS	127,067.00	127,067.00
20	INSTALL & MAINTAIN EROSION CONTROL	1.000	LS	30,056.24	30,056.24
30	CLEAR & GRUB SITE	38.750	AC	2,462.70	95,429.63
40	REMOVE & STOCKPILE TOPSOIL	12,450.000	CY	2.00	24,900.00
50	REMOVE UNSUITABLE CLAY & DISPOSE	22,435.000	CY	16.68	374,215.80
60	ROCK REMOVAL	25,410.000	CY	35.37	898,751.70
70	BULK EXCAVATE & PLACE AS FILL	204,500.000	CY	5.21	1,065,445.
80	EXCAVATE RETENTION POND	75,400.000	CY	7.82	589,628.00
90	REPLACE TOPSOIL & ROUGH GRADE	12,450.000	CY	9.15	113,917.50
100	RC PIPE (CL IV) (36 IN)	116.000	LF	92.38	10,716.08
110	RC PIPE (CL IV) (30 IN)	220.000	LF	123.49	27,167.80
120	RC PIPE (CL IV) (24 IN)	360.000	LF	87.55	31,518.00
130	FLARED END SECTION - ALL DIAMETERS	1.000	LS	57,107.05	57,107.05
140	INLET (COMPLETE) (TY A)	12.000	EA	5,010.50	60,126.00
150	INLET (COMPLETE) (TY C)	8.000	EA	5,759.11	46,072.88
160	FINE GRADE & FINISH SUBGRADE	57,930.000	SY	0.63	36,495.90
170	INSTALL 9" CRUSHED STONE BASE	21,725.000	TON	28.47	618,510.75
180	MILL & REMOVE EXISTING A/C	28,950.000	SY	2.50	72,375.00
190	HOT MIX ASPHALT PAVING	9,450.000	TON	46.88	443,016.00
200	REFL PAV MRK TY I (W) (4") (SLD)	7,500.000	LF	1.93	14,475.00
210	REFL PAV MRK TY I (W) (4") (BRK)	5,000.000	LF	1.65	8,250.00
220	REFL PAV MRK TY I (W) (ARROW)	10.000	EA	275.79	2,757.90
230	REFL PAV MRK TY I (W) (SYMBOL)	8.000	EA	193.05	1,544.40
240	REMOV TRAF BAR (WOOD POST & CABLE)	5,000.000	LF	2.21	11,050.00
250	METAL TRI-BEAM GUARD FENCE (12 GA)	7,500.000	LF	4.69	35,175.00
260	CHAIN LINK FENCE (4')	5,000.000	LF	8.83	44,150.00
Bid Total =====>					\$4,839,918.63

Direct Cost Report

H.C.S.S.

DEMO

DEMO ESTIMATE

Page 1

01/16/2008 19:06

DIRECT COST REP

Activity Resource	Desc	Quantity Pcs	Unit	Unit Cost	Perm Labo	Const Mater	Equi Mat/E	Sub Ment	Total
-------------------	------	--------------	------	-----------	-----------	-------------	------------	----------	-------

BID ITE : 10 Land Item SCHEDUL1 100
 Description CLEAR AND GRUBB Unit = ACR Takeoff Quant^{*****} Engr Quant^{*****}

A	CLEAR AND GRUBB	Quan: 40.00 AC	Hrs/Shft: ~	Cal40 W	TX0001
CH	Heavy clearing	80.00	CH	Prod: 4.0000 US	Lab Pcs: 7.00 Eq Pcs: 5.00
8D6	CAT D6 Dozer	1.00 80.00	HR	49,210	3,937 3,937
8D8	CAT D8 Dozer	1.00 80.00	HR	76,530	6,122 6,122
8E225	CAT 225D Excava	1.00 80.00	HR	49,350	3,948 3,948
8L953	CAT 953 Tract lo	1.00 80.00	HR	42,820	3,426 3,426
8TPU	Pickup truck	1.00 80.00	HR	8,210	657 657
L1	Laborer unskilled	2.00 160.00	MH	10,000	2,366 2,366
L2	Laborer, semiskill	1.00 80.00	MH	11,000	1,289 1,289
O1	Operator general	3.00 240.00	MH	12,000	4,342 4,342
O3	Operator, excavat	1.00 80.00	MH	16,000	1,900 1,900
\$27,986.84	14.0000 MH/ACRE	560.00	MH	[166]	9,897 18,090 27,987
0.5000 Units/	4.0000 Un/Shift*	0.0714 Unit/		247.43	452.24 699.67

B	DEBRIS REMOVAL AND HAULING	Quan: 1.00 LS	Hrs/Shft: ~	Cal40 W	TX0001
2DUMP	DUMP FEE	3,000.00	CY	8,000	24,000 24,000
4HAULLD	Hauling Sub by t	180.00	LOAD	125,000	22,500 22,500
\$46,500.00				[]	24,000 22,500 46,500
				24,000.00	22,500.00 46,500.00

====Item Tot 10 - CLEAR AND GRUBB
 \$74,486.84 4.0000 MH/ACRE 560.00 MH [166] 9,897 24,000 18,090 22,500 74,487
 1,862.171 40 ACRE 247.43 600.00 452.24 562.50 1,862.17

BID ITE : 20 Land Item SCHEDUL1 100
 Description REMOVE OLD CONCRETE Unit = SY Takeoff Quant^{*****} Engr Quant^{*****}

A	REMOVE SIDEWALK	Quan: 1.0000 LF	Hrs/Shft: ~	Cal40 W	TX0001
TLC	Track loader crew	30.68	CH	Prod: 242.0587 US	Lab Pcs: 1.00 Eq Pcs: 1.00
8L963	CAT 963 Loader	1.00 30.68	HR	65,520	2,010 2,010
O1	Operator general	1.00 30.68	MH	12,000	555 555
\$2,565.21	0.0219 MH/LF	30.68	MH	[0.263]	555 2,010 2,565
45.6323 Units/	365.0587 Un/Shift*	45.6323 Unit/		0.40	1.44 1.83

B	DEBRIS REMOVAL AND HAULING	Quan: 1.00 LS	Hrs/Shft: ~	W	TX0001
2DUMP	DUMP FEE	1,000.00	CY	8,000	8,000 8,000
4HAULLD	Hauling Sub by t	45.00	LOAD	125,000	5,625 5,625
\$13,625.00				[]	8,000 5,625 13,625
				8,000.00	5,625.00 13,625.00

APPENDIX

Quick Reference Guide

Most Commonly Used Navigation Techniques

Scan Records

- Click arrow icons on tool bar
- Click arrows at edges of tables
- Press CTRL+END and CTRL+HOME keys
- Press PAGE UP and PAGE DOWN keys
- Press F7 and F8 keys
- Press UP ARROW and DOWN ARROW keys

View Selection Lists

- Click selection button in a data field
- Press F4 key while cursor is in a field that has a selection button

Save Records

- Click disk icon on tool bar
- Press CTRL+S keys
- Press F2 key

Delete Records

- Click [X] delete icon on tool bar
- Press CTRL+D keys
- Press SHIFT+F2 keys

View Help

- Press F1 key
- Select HELP tab > HeavyBid Help F1

Exit

- Click [X] close button at top-right of window
- Press ESC key
- Click Cancel button (where available)

Cost Entry

Estimate Tab (ALT+T)

- Tree View: Enter costs in an easy-to-read view that displays the estimate in a tree format.
- Spreadsheet View: Enter activities in a spreadsheet format (particularly excellent for changing crew productions).
- Single View: Enter costs into the estimate, one activity at a time.
- Quick Sub/Material Entry: (Optional) Enter and analyze a large number of subcontract or material items.
- Copy Biditems/Activities: Copy items within and among estimates.
- Spreadsheet Links: (Optional) Link costs and quantities to spreadsheets.

Cost Editing

Edit Tab (ALT+E) > Change Estimate Data

- Change Biditem Data: Change selected data in selected biditems.
- Change Activity Data: Change selected data in selected activities.
- Change Material/Other Resource Costs: Review and change resources throughout the estimate.
- Change Sales Tax / Escalation: Change taxes and escalation throughout the estimate.

Setup Tab (ALT+S)

After changing any item that has been used in the estimate, the estimate can be updated with the new rate.

Typical Steps in Creating an Estimate

A. One-Time Setup

1. Select the \ESTMAST estimate (Master Estimate).
2. Set up overtime rules.
3. Set up calendars.
4. Set up worker's comp rates.
5. Set up typical labor crafts.
6. Set up typical equipment.
7. Set up typical crews.
8. Set up typical markup %, addons, and bond tables (on Bid Summary screen).
9. Set up default Estimate Information Data, including Sales Tax, DBE codes, and default values (e.g., calendars, work rules).

B. Create Estimate

1. Select File tab > New > New Estimate.
2. Enter an Estimate Code, and then click Next.
3. Enter the Estimate Name, and then click Next.
4. Select \ESTMAST as Source Estimate (or select another estimate), and then click Finish.

C. Modify Resources

1. Change any estimate value (e.g., tax rates, bond tables).
2. Modify any resource (e.g., labor, equipment, crews, materials).
3. Set up Biditems (or equivalent).

D. Enter Estimate

1. Use options on Estimate tab to enter activities, crews, and cost resources into the estimate.
2. Use options on Query tab to check your work with Biditems, Activities, etc.

E. Print Estimate

Select Reports tab > Cost Report to print a copy of the estimate.

F. Summarize Estimate

1. Select Summary tab > Summary to open the Bid Summary window.
2. Click the Run Bid Summary and Run Spread buttons if they are bolded.

G. Add Markup, etc.

1. Specify or change the markup percentage.
2. Add or change addons as necessary.
3. Ensure Bond has been set up and selected if desired
4. Specify Spread Overrides to set up alternate Markup, Indirect, and/or Addon/Bond.

H. Compute Bid

If bolded, click Run Spread button to spread all Markup, Indirects, etc., and to generate the balanced bid prices.

I. Print Summary Reports

Select Summary tab > Summary Reports to print Bid Summary Reports if desired.

J. Review Bid Pricing

Select Summary tab > Pricing to modify bid prices if desired. The Bid Total is highlighted in yellow.

K. Make Changes

1. Make changes to cost resources as better prices come in.
2. Use the Edit tab to access special change routines.
3. After any changes to cost, return to "Summarize Estimate" step and repeat remaining steps as necessary.

L. Review Estimate

Always review your estimate (Query tab > Estimate). The Estimate Review lists over 60 information about the estimate that may help you avoid an error.

Cursor Movement

Mouse

- Select tabs and menu options
- Click icons and buttons
- Click in a field to move cursor there

Function Keys

- F1** Open help
- F2** Save
- F4** Open selection list for current field (where applicable)
- F5** Clear fields on screen
- F6** Move cursor to next field
- F7** Find previous record
- F8** Find next record
- F11** Insert new row in table (grid)

ALT Keys

Press and hold the ALT key, and then press the underlined letter in a word to perform that function. You can also use ALT keys to open the menu tabs:

- ALT+F** File tab
- ALT+E** Edit tab
- ALT+S** Setup tab
- ALT+T** Estimate tab
- ALT+Q** Query tab
- ALT+R** Reports tab
- ALT+U** Summary tab
- ALT+Y** Subsystems tab
- ALT+O** Tools tab
- ALT+H** Help tab
- ALT+F4** (Exit *HeavyBid*)

CTRL Keys

- CTRL+A** Insert a new line in tables
- CTRL+C** Copy data to clipboard
- CTRL+D** Delete current record
- CTRL+O** Open estimate
- CTRL+P** Print report
- CTRL+N** New estimate
- CTRL+R** Abandon changes rather than saving
- CTRL+S** Save current record
- CTRL+V** Paste copied/cut data from clipboard to the cursor location
- CTRL+X** Cut data to clipboard
- CTRL+Z** Clear field
- CTRL+END** Find last record
- CTRL+HOME** Find first record
- CTRL+F4** Escape from current screen
- CTRL+F6** Move from screen to screen

Other Keys

- TAB** Move cursor to next field
- SHIFT+TAB** Move cursor to previous field
- ENTER** Move cursor to next field (exception: if a button is highlighted, it executes the button like a mouseclick)
- ESC** Exit current screen
- PAGE UP** Scan table backwards
- PAGE DOWN** Scan table forwards
- UP ARROW** Move up one line in tables
- DOWN ARROW** Move down one line in tables

Code Structure

HeavyBid uses a cost code structure that allows each cost resource to be identified by a unique code:

BIDITEM + ACTIVITY + RESOURCE

Biditem

The code for a group of costs. The code is 10 digits and we recommend it be the sequential item number times 10 or 100. A separate 28 character field is available for the owner's code number.

Biditem Codebook

A database of state codes and descriptions to quickly set up bid items for state work; it can also be used for private work.

Biditem Types

- "D" Direct cost category.
- "I" Indirect cost category. All costs here must eventually be spread to the Direct cost categories.
- "N" Non-additive items which do not add into the estimate totals. These are typically used as alternates or cost workups you do not want to delete.
- "H" Holding Account. Costs in this biditem are spread to other biditems in the estimate, through Holding Account Entry.
Available in Advanced and Comprehensive systems.
- "E" Equipment Account. Costs in this biditem are used to calculate the rental rate for a piece of equipment in Equipment Setup.
Available in Comprehensive systems.

You can change the items from one cost type to another at any time.

Activity

A task that is performed within a biditem. You can think of it as a verb, such as "Drive Piles" or "Buy Structural Steel." Activity codes can be up to 12 characters, but we do not recommend using that many. There can be as many activities in a biditem as necessary.

Activity Codebook

A standardized activity structure that can be customized to any type of work. Enables you to standardize your activities and offers many additional features to automate your estimating.

Resource

The cost resources required for an activity. Resource codes can be up to 12 characters, but we recommend you use 6 or less. There can be as many resources in an activity as necessary.

The first character of the resource code indicates the type of cost as follows:

- "A-Z" Labor
- "2" Material
- "3" Expenses
- "4" Subcontracts
- "8" Equipment

Material, expense, and subcontract resources are selected from the "System-Wide" Material/Other Resources codebook. As they are used, they are copied into the "Local Material" file (local to this estimate). So if you take this estimate home or send it to someone else, all material used in the estimate appear as resources.

Cost Code Examples

- 10 CLASS A CONCRETE 2110 CY (Biditem)
- A Set & Strip Forms 48000 SF (Activity)
- 2FM7 form matl (Resource)
- 2RE60 grade 60 rebar (Resource)

- 8HCR 25 t. hydra crane 1.00 (Resource)
- 8WLD welding machine 1.00 (Resource)
- CF carpenter foreman 1.00 (Resource)
- CJ carpenter journeyman 3.00 (Resource)
- LC laborer-common 6.00 (Resource)
- OC operator-crane 1.00 (Resource)

"10 A CF" is the unique cost code that indicates a Carpenter Foreman is used in activity A, in biditem 10. All cost codes in activity A are summed to give totals for activity A. All activities in biditem 10 are summed to give a total for biditem 10.

Folder Organization

\HEAVYBID is the main folder

\EST contains estimates

\ESTMAST is the master estimate

\DEMOMAST is the demo master data when installed

\9701 might be the code of an estimate

\9702 might be the code of another estimate

\HCSS contains System-Wide Data

\BIN contains **HeavyBid** Programs

Types of Data

System-Wide Data

Data available from any estimate. These files are:

- Material/Other Resources Codebook (except Labor & Equipment)
- Metric Conversion Rate
- Directory of Estimates / Estimate Management
- Biditem Codebook
- Activity Codebook
- User Setup
- Report Heading Setup
- System-Wide Quote Folders

Estimate-Specific Data

Data stored in your particular estimate and not available in other estimates (except when using the Copy Activity function). These files are:

- Estimate Information
- Labor
- Calendars (for labor premium)
- Labor Work Rules (for premium)
- Workers' Comp Rates
- Equipment
- Crews
- Local Material/Other Resources
- Biditems
- Activities
- Cost Resources
- Markup, Addon, and Bond Information

Information that is repeated across estimates should be set up in the Master Estimate so that it is copied into each new estimate.

Master Estimates

In *HeavyBid*, estimates are created by copying from an existing estimate. Estimates that are used regularly for this purpose are called master estimates. When the system is installed, there are two master estimates:

- ESTMAST: Intended to be your master estimate. When HCSS refers to the master estimate, this is the estimate being referred to.
- DEMOMAST: Contains HCSS-supplied data that you can copy to quickly make test estimates.

A master estimate typically contains resources, but no biditems, activities, or cost detail. In other words, it is an empty estimate but one with resources ready for estimating. You can have multiple master estimates; they are identified as masters when the estimate is created and when you open them in the Open Estimate window.

Managing Estimates

Create Estimate (CTRL+C)

On the File tab, select New > New Estimate. Typically, an estimate code and estimate name are the only required information.

Open Estimate (CTRL+O)

- To open any estimate, select File tab > Open. In the Open Estimate window, note that master estimates are listed on a separate tab.
- To open a recent estimate, select File tab > Recent.

You can open another estimate at any time. For example, while you are in the Bid Pricing screen and closing out three estimates, you can alternately open each estimate without leaving the screen.

Delete Estimate

This always requires a password. If the estimate does not have a password, use the standard password: "DOZER".

Back Up Estimate

Data is saved onto your hard disk as you work and it is rare that you can lose more data than is on your screen at the time of a power failure or other problem. However, it is prudent to back up your data every few hours of heavy entry. Use the Backup option on the File tab.

Carry an HCSS support card with you wherever you estimate. It contains our 24/7 support number as well as home phone numbers in case of an estimating emergency.

Glossary

activity

A function of work that must be completed to make up part or all of a biditem. There can be one or more activities per biditem.

bid quantity

The quantity on the bid proposal or the document submitted to the owner.

biditem

An item required by the client to be performed by the contractor. It is part of the basis on which the contractor is paid. In *HeavyBid*, it can be a payitem, a place to put overhead costs, or it can represent a line of text on a bid proposal.

burden

All additional costs that are incurred over and above the actual base rate for a particular labor craft. This includes, but is not limited to, workers' comp., fringes, taxes, and per diem cost.

child biditem

An item that has activities and resources, but sums up with other child items to a "parent" item. Child items do not show on a bid form.

client number

The owner's official number for a particular biditem.

construction material

Material that is used on a project and is destroyed during construction or removed when it is finished (e.g., formwork, traffic barricades).

crew

Typically, a grouping of labor and equipment that work together in an Activity. The crew has an associated production type and rate that calculates the hours that generate the costs.

direct biditem

A biditem that you will be directly paid for; a bid proposal item.

equipment account

A biditem used to generate the rent of an equipment piece in the estimate. An equipment account biditem must be used in conjunction with an Alternate Rent Calculation.

fuel rate

The dollar value cost of fuel to run equipment per unit. In Basic systems and below, this value is typically used for all equipment operating expenses (EOE) equipment setup.

holding account

A biditem where cost is gathered in order to spread back to specific biditems, based on quantity of units in each item.

indirect biditem

A biditem that collects all costs that need to be in the estimate, but you are not being directly paid for. These costs will be spread back to the direct biditems at the end of the estimating process based on spread instructions. These biditems do not appear on the bid proposal.

inside rent

The cost of ownership per unit for a piece of equipment.

local

Data or resource exists and can be changed only in the current estimate.

library biditem

A biditem that resides in a library estimate. This item typically has more than one activity and is completely worked up with all crews, production rates, materials, and subs necessary to complete the item. That item is then linked to an associated biditem codebook item as a default.

library estimate

An estimate containing a list of frequently used biditems that already contain costs (activities and resources) that you can copy into another estimate. You can only have one library estimate per system.

master estimate

A template of information that is common throughout all estimates. This information includes, but is not limited to, labor costs, equipment costs, crews, and taxes. The master is used as a basis for creation of all other estimates. You can have as many master estimates as necessary. One of the main reasons to have more than one master estimate is having more than one set of labor rates.

non-additive biditem

A biditem that does not add into the total cost of the estimate.

outside rent

The cost of renting the equipment per unit.

parent biditem

A pay item that is very broad in scope. It requires subdividing into two or more child items in order to thoroughly estimate the value. The parent item shows on a bidform and is a sum of all the child items under it.

permanent material

Material that is used on the job and remains in place (e.g., aggregates, asphalt, different types of pipe).

rent rate

The dollar value cost of ownership or rental cost per unit for equipment.

resource

Can be a labor craft, piece of equipment, material, or subcontractor. It is the lowest level of detail in the estimate and includes costs.

self-performed work

Refers to the cost of work you will perform, as compared to the cost of the same work if performed by a subcontractor.

system-wide

Data and settings that are not specific to one estimate.

takeoff quantity

The quantity you actually expect to get paid for rather than the quantity that you are quoting.

