

Estimating & Database Fundamentals and Extended Class

Who: Day one, Estimating Fundamentals, is for new Estimating users and it covers an overview of Timberline Estimating and basic operating procedures. Day two, Database Fundamentals covers Database basics and tools used to modify existing Database information. The third day, Extended, covers shortcuts, additional features and other useful information. Clients may attend all three days, just Estimating Fundamentals, just Database Fundamentals or just Extended.

Content:

Estimating Fundamentals: One day on basic concepts, procedures and topics, including how to create estimates, manipulate spreadsheets, and generate reports.

Database Fundamentals: One day on database concepts and procedures, including creating a new database, adding Phases, Items and Assemblies, and using database tools to manipulate existing database information.

Extended: One day on additional features, including building Crews and Bid Grids, and using Cuts and Adds, WBS Codes, and Estimate Adjustments.

Credit: CPAs successfully completing this course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

Prerequisites: A familiarity with Microsoft® Windows®. We encourage clients to familiarize themselves with the software prior to attending.

Class Rates:

One Day: \$450 1st participant, \$400 each additional
Two Day: \$800 1st participant, \$700 each additional
Three Day: \$1095 1st participant, \$995 each additional

Registration:

Please fax completed registration form to 704-394-0052 or register online at www.cisinfo.com/classroom.htm for more information please call 704-393-0038 x1142

Course Outline

DAY ONE

Estimating Fundamentals

- Estimating Overview
- Set Up an Estimate
- Quick Takeoff
- Perform Item Takeoff
- Assembly Takeoff
- Spreadsheet Layouts
- Sorting the Estimate
- Manipulate the Spreadsheet
- Using Locations
- Using the Totals Page
- Create Reports, Report Options
- Interface w/Job Cost

DAY TWO

Database Fundamentals

- Getting Familiar w/Desktop
- Database Overview
- Using the Database Wizard
- Setting up Items
- Creating Formulas
- Building Assemblies
- Multiple Prices & Productivity
- Estimating Tools
- Create Reports, Report Options

DAY THREE

Extended

- Database Settings for Crews
- Resources and Resource Rate Tables
- Database Crews
- Add Crews to Database Items
- Crew Takeoff, Repricing and Reports
- Create WBS Codes
- Build a WBS Library
- Use and Change WBS Codes in Your Estimate
- Enter Multiple Subcontractor Bids
- Bid Grid Reports
- Cuts and Adds
- Working with Estimate Adjustments
- Adjust Productivity
- Substitute Item
- Adjust Column, Job Total, Job Cost/Unit
- Edit Job Size
- Convert Estimates using Metricon
- Spreadsheet Reports
- Comparison and Variance Reports