

LiberRATE Estimating LiberRATE^{v4}



It thinks like you do!

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Installation and Un-installation Instructions

Please read the section on installation carefully. Incorrect installation may invalidate your licence.

Login

Your system is delivered with the following information set in.

Please change this using the Admin>Authorised Users from the menu if security is an issue.

USER NAME	Superuser
PASSWORD	Demo

Licence

The licence agreement is at the rear of this manual. Use of the system implies your agreement to all copyright conditions and full agreement to the licence conditions for this software.

Support

Support on LiberRATE is available to you on an unlimited basis.

Please call LiberRATE Estimating

Tel +44 + 01252 795030

Email info@libr8.co.uk

FUNCTIONS LIST LIBERATE EDITION 4

Function	
Security	
Login only approved user(s).	✓
User can only access Jobs designated to each user's level i.e. set who can see which jobs as appropriate.	✓
Administrator level can add new users and set who sees what	✓
Set which users can administrate the libraries.	✓
	✓
The Job Screen	
Create a new Job and control all of your resource costs, labour hours and profits from a single easy to use screen	✓
Duplicate any Job and use the duplicate to submit variations on your tender	✓
Change the default labour rate to fine tune tasks that use the default labour rate	✓
Use other labour rates from a library of other labour rates	✓
Get instant feedback on how many man days there are in your Job.	✓
Adjust the "Hours per day" figure to cope with winter or summer, long distance or other difficult working conditions	✓
Set the type of estimating: Normal or frequency based estimating. Frequency based is turned off by default	✓
Backup one or many Jobs to enable portability of Jobs or just to backup for safekeeping	✓
Start new jobs with default mark-ups as set in in the options	
	✓
The Items Screen -Your main Estimating Screen	✓
Create new tasks from first principals using "normal language" You are not tied in to Surveyor speak and can produce quotes and schedules in the jargon appropriate to your clientele.	✓
Take off pads record your measurements and calculations. No limit to the number of takeoff pads you can use in any task. Take off pads can be set against each material resource	✓
Take off pads as above against each plant as well as material resource	✓
Add resources to a task even if the resources do not exist in your library	✓
Save a built up task to your items library to retrieve again in the future. You'll never have to build up the task again - no matter what the size or quantity	✓
VAT. Optionally add VAT to your Job	✓
Find and Replace resource; Replace a resource with another throughout your Job	✓
Spell check at Items level	✓
Items Library	
Select one item at a time from the items library.	✓

Function	
Select multiple items from multiple categories, review a schedule of what you have selected and bring these all into your B/Q at the same time.	✓
Insert Library item at any point on the build up page.	✓
Combine multiple Library items. Select two or more items and combine them into one item. On each item you will be asked for the individual quantity of that item required to make up the quantity of the new item. You would then be able to store the new item back to the library	✓
Import of library item into existing item. This would allow an assistant to type in/scan in/import a list of bill items. The relevant library item would then be retrieved into the current item.	✓
Select items from the library by Category, Code, Original Job or Keyword	✓
Create new categories from your build up page to save directly into the Items library	
Separate program for library administration. The library can be updated in a multi-user environment whilst the estimator works on the pricing	✓
Retrieved items will automatically update with the current library labour rates and resource prices	✓
There are two completely separate library sets; Users can set which library they wish to address. E.g. Building works or Civil Works. You can custom name the libraries as you wish	✓
Resource Libraries	
You have 4 Resource Libraries; Materials Labour Plant Sub Contractor. Each library activated depending on which resource screen you are on	✓
Quick search from hotkey. Type the first few letters of a required resource and the LiberRATE search engine will bring up a list of resources that match.	✓
Change prices in libraries will not automatically update your Job - Update only the Jobs you want to update	✓
Enter Pack size in Library for calculation of full packs required by your Job. LiberRATE will advise you on allowances to make to full pack size. (Material and Plant)	✓
Enter Waste factor in your resource library	✓
Enter Supplier discounts in your resource library	✓
Import electronic supplier lists Next year's import will not overwrite discounts so you can update each year electronically	✓
Search by supplier, category, description or code or a combination to find the resource you require	✓
Update selected resources by a %	✓
Export to an Excel file for updating and re-importing	✓
Automatic date against each resource entered in the resource library. This will enable you to see the date when you last updated this resource. The date update will only change if there are changes to the price of the resource	✓
Item Screen Functions	
Build up the extent of your task – not a single unit. See screenshot for explanation	✓
Add as many different resources into each resource type as you wish to fully describe each aspect of the task. The estimate then becomes the site task schedule when the Job is won	✓
Set header items	✓

Function	
Exclude items in your Bill from the final totals (lets you provide alternatives that don't add in to the final total)	✓
Apply individual mark-ups to resources to exclude them from the global mark-ups	✓
Set any item or resources as a provisional sum to be summarized separately	✓
Undo up to 12 levels of deletions	✓
Bookmark multiple items	✓
Find or Find and replace a resource with another resource in one location or throughout your job	✓
Estimate using the frequency option (This must be switched on from the Job screen)	✓
Multi-user functionality	
Your Jobs and Library database will have multi-user capability. If you are on a network your entire team or organization will be able to use the same library and Jobs databases	✓
	✓
	✓
Bill of Quantities Import	✓
Import Electronic Bills of quantity into the system for pricing in your clients format	
	✓
Master Jobs	✓
A master job will control a number of sub Jobs. This will mean that if a Job is divided into different sections say Earthworks, Pavings, Walls, Water features. Each section will have its own Sub totals and reports. There will also be reports for the Global Job.	✓
	✓
Job Folders	
Jobs stored in a folder system. Folders can be named by yourself e.g. Big Jobs Small Jobs Old Jobs etc. You will be able to have as many folders as you like for storing or organizing your jobs	✓
Frequency Option	
This is a switch able option mostly designed for maintenance estimating where tasks are repetitive over a period such as facilities management ground care or railway maintenance You are get totals and reports on a per occasion or per annum basis or a combination of both.	✓
Overhead and Profit	
Add percentages to 2 decimal places for each resource type globally or at individual task level	✓
Add an overhead % to your Job separately from the profits	✓
	✓
Database Check and Repair	
Accessed from the Admin menu to optimise the database. Should be run frequently to safeguard data	✓

Function	
Reports	
A fully functional set of reports for both issue to client and project management	✓
Reports may be issued with options of "At cost, With profit or even have prices left out	✓
Reports for master jobs and sub jobs using the current set of reports	✓
Reports of required revenues/resources for selected jobs or jobs between selected dates	✓
Project management reports on expenditure to date and required expenditure. Using master job functions	✓
Add logos and standard text your BQ report	✓
	✓
Administrative version	✓
A free administrative version is now available for all multi user systems. This has reduced functionality	✓

INSTALLATION - LIBERATE EDITION 4 - PLEASE READ CAREFULLY

We are assuming that all installation is to the local drive - C:\ Please substitute any other drive if appropriate. The drive must be on your local machine

NETWORKS

LiberRATE is suitable for network installation if you have purchased the multi-user version. A different installation package will be sent to you if you wish to install the network version

Warnings

There are no warnings at the time of publication of this manual.

ACTIVATION

Your Licence must be activated before you can run the program
Please note that this programme has a copy protection facility.
You will need to activate the program before it will run.

INSTALLATION - LIBERATE EDITION 4 - PERSONAL EDITION

1. Close all programmes until you only have your desktop showing on your screen.
2. Use [Start] [Run] and [Browse] to find PSetup.exe If you have downloaded the programme from our website then it will be in a default download directory).
3. Use [Select] when you have located PSetup.exe then [OK] to run the file.
4. Liberate will then begin to load onto your computer.
5. You will be asked to accept our **Licence Agreement**.
6. You will be asked for confirmation to create a Liberate directory on your computer. The default position is on the C drive (C:\Program Files\Liberate) or C:\Program files (x86)/ Liberate - if you would like it created elsewhere then adjust the programme path by using [Browse].
7. If you already have a **Previous Version** of Liberate on your computer this will be automatically detected and you will be given some important information about upgrading
8. (Your existing copy will be left intact and you will have a separate copy of V4 on your machine)
9. The following screen will ask which libraries and jobs databases to install - select [Sample Jobs and Library Databases] and click [Next] to commence the installation.
10. Liberate will install and will indicate when it has been installed successfully (usually takes approximately 1 minute).
11. Close down the installation programme by clicking [Finish]

FILE LOCATIONS

- The program is installed by default to the C:\Program files\ or (Program files X86) directory (You can vary this)
- The Databases are installed to the folder C:\Users\user_name\AppData\Roaming\Liberate (you cannot vary this)
- Note This is a hidden directory and you would need to Use the Windows View Options to show hidden files and folders.
- Please ensure you back up the Jobs and Library folders found as above - regularly
- The licence is installed to the directory C:\ProgramData\JR

ACTIVATION

12. . There will be a "Liberate" symbol shortcut on your desktop:- Or go to the Program Group Liberate PE
 - Click on the Desktop Shortcut and you will be asked if you wish to activate your programme; Follow the procedure through by pressing the OK Button. You will be connected to the internet.
 - Choose **Install as a Trial** if you do not have a licence key or see below if you are an existing user.
 - You will be asked to register and a verification email will be sent to you. Once you have verified your email address by clicking on a link sent to you your program will start. You are now ready to **Login**.
 - Username: Superuser


- Password: Demo

We suggest that you now familiarise yourself with the system and then arrange for free telephone based training at a time and date that is convenient to you.

RE- INSTALLATION FOR EXISTING USERS - LIBERRATE EDITION 4 - PERSONAL EDITION

MOVING LIBERRATE TO ANOTHER COMPUTER

If you are installing to a new computer and you already have a licence key:

- Personal edition -Download the latest Version from our Trials and Downloads page
- Multi –user – Please request the link to the latest version
- Reference your licence key from the information  button which is accessed from the Help menu and then About
- Or ask us to send you your licence key
- Use this licence key to install your system as a Standalone you will not have to reregister.
- Do not use your system more than 3 in any 40 hour period times on your old machine as this will lock up both machines.
- Once you have installed LiberRATE on your new machine transfer the databases from your old machine to your new machine.
- The databases in two folders called Jobs and Library at: -
C:\Users\user_name\AppData\Roaming\LiberRATE\LiberRATE PE.
- Copy the folders from the **old machine** and replace the folders on the **new machine**
- Please be careful not to lose your data and if you are unsure please call us.

Warning

Both versions of LiberRATE (old and new machines must be closed)

You will destroy any data on your new machine once you replace the databases

A short tutorial on how to use LiberRATE is at the back of this manual

NETWORKS

LiberRATE is suitable for network installation if you have been supplied with the multi-user version.

WARNINGS

INSTALLATION FILES

- Please download the latest files from our website using the links given to you. Files which you have downloaded previously may have been updated.

ACTIVATION

- Your Licence must be activated before you can run the program.
- Please note that this programme has a copy protection facility.
- A verification email will be sent to the address you register. If you do not receive this please check your Junk mail box or call us.

OVERVIEW OF PROCEDURE

The multi user version is delivered in two files.

Server installation: This must be installed to a shared drive running Windows software. It is not suitable for installation on attached devices

File 1 is installed as one of two options below

File name: libr_mus_install_4.exe (mus =multi user server)

1A Option A Standard Servers

Read section A below if you will be installing your software onto a standard network server or where you have multiple PCs connected together over a network and a PC is designated as a server. You can ignore Option B

1B Option B Terminal server installation

Users can log in remotely or users working in an office environment will connect to their data over a conventional network with the added benefit of remote login. You must have a Terminal server to use this option. If you are not sure use Option A

2 Client installation for all users.

File name: libr_muc_install_4.exe (muc =multi user client)

File 2 is installed to all machines which will be used by each user to access the LiberRATE Jobs and Library databases.

This is installed on each client PC with its own licence.

Other information before starting

- You may need Administrator rights to install on a network.
- The installation folder for the databases must be set to share
- Read /Write access should be set automatically for the LiberRATE data folders.

CLARIFICATIONS: *(we have mentioned this previously)*

Server

- The server file is installed on the server machine and contains the databases. The Server file should only be installed once initially.
- Any updates issued by LiberRATE are designed not to reinstall the database files but to only update the server software.
- It is however advisable that before reinstalling the Multi user server (MUS) program that the databases are backed up to prevent loss of data.

Client

- Used for all standard installations
- The Client files are installed on each separate client machine and point to the shared databases.
- Each client has a separate licence.

Terminal server installation

1. Where a terminal server is used to login from outside the office environment, a desktop shortcut on the terminal server allows a maximum number of simultaneous licenced users to login.
2. This desktop shortcut is added by the administrator to the libr_mus.exe file installed in the LiberRATE program folder on the terminal server and requires its own licence key if this type of system is being used.

INSTALLATION PROCEDURE – MULTI-USER EDITION FOR NETWORKS

SERVER FILE INSTALLATION

There are two types of installation options.

- If you are installing a standard Windows server use Option A. (This is the most likely option)
- If to are installing to a Terminal server or a LAN use option B

OPTION A:

For Normal Windows Server installations:

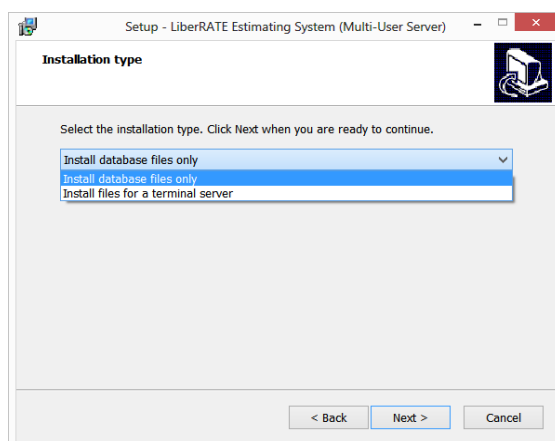
1. The server file must be installed first.
2. Run the file `libr_mus_install_4.exe` at the server machine.
3. You cannot run the server file using an UNC path ([\\Server](#)). You must install at the server or user remote desktop.
4. The Program will be installed by default to `C:\Program Files (x86)\LiberRATE\LiberRATE MUS`. You can vary the default program files path.
5. On the next dialogue you will see a dropdown box "Install database files only". Accept this if you are installing to a normal server.
6. Note for reinstalling: LiberRATE will not reinstall new databases if it detects a Jobs and Library folder. We do suggest however that you make a backup for security of your data if reinstalling
7. The data files containing all user created data will be installed to a folder of the user's choice on the server machine. Its best to pre-create this folder (e.g. LiberRATE V4 Data) but you can make a new folder at this point.
8. Choose empty or sample databases. (Existing databases will not be overwritten but it's best not to take a chance Please make a backup of Jobs and Library folders)
9. The installation will complete.
10. You must now install The Multi user client on each client machine. See below go to Section 2

OPTION B: SKIP IF YOU HAVE USED OPTION A

Only for Terminal server installation or if you have been instructed by LiberRATE to do so. Choose the Terminal server option from the Select database files dropdown when asked.

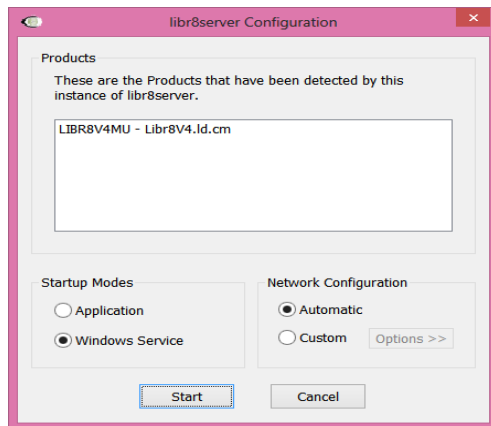
Before installing this option please ensure that we have supplied you with a licence key configured for Terminal servers.

1. Run the file `libr_mus_install_4.exe` at the Terminal server machine.
2. You cannot run the server file using an UNC path (`\\Server`). You must install at the server or use Remote desktop.
3. The Program will be installed by default to `C:\Program Files (x86)\LiberRATE\LiberRATE MUS`. You can vary the default program files path.
4. On the next dialogue you will see a dropdown box "Install database files only". Change this to the "Install files for a terminal server".

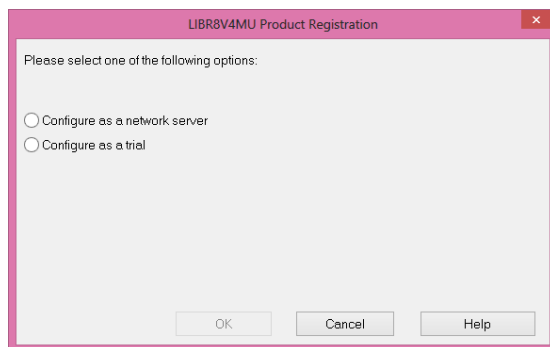


Note for reinstalling: LiberRATE will not reinstall new databases if it detects a Jobs and Library folder. We do suggest however that you make a backup for security of your data if reinstalling

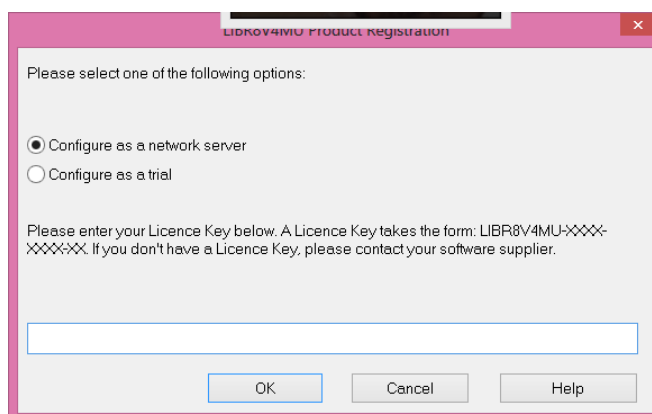
5. The data files containing all user created data will be installed to a folder of the user's choice on the terminal server machine. It's best to pre-create this folder (e.g. LiberRATE V4 Data). You may create a new folder at this point using the New folder button on the dialogue box.
6. Choose empty or sample databases. (Existing databases will not be overwritten if you are reinstalling but its best not to take a chance. Please make a backup of the Jobs and Library folders)
7. The installation will complete.
8. The libr8sever Configuration box will appear with the Start-up mode selected for Windows service and the Network service as Automatic
9. Press "Start"
10. If this does not appear please start this manually from `C:\ProgramFiles\LiberRATE\Server\Libr8server.exe`



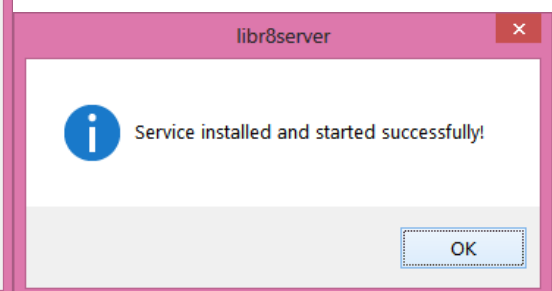
11. You will now be asked to allow the service to automatically configure your firewall. Accept this
12. The LIBR8V4 Product registration dialogue will appear



13. Choose “Configure as a network server” and enter the key which we have given you. (If you don’t have a key at this point please abort and request a key)



Once the Key is entered you will receive this dialogue

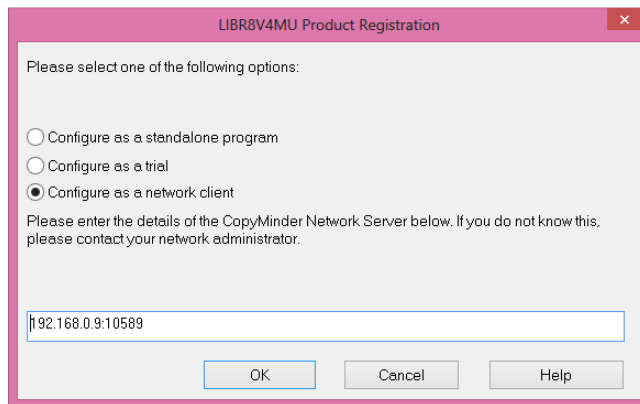


14. Press finish to complete the installation.

If you intend to allow remote login, administrators should now add a shortcut to the desktop of the terminal server pointing to the file “\LiberRATE MUS\libr_main.exe”. (We deliberately do not add this as a default during our installation to prevent unintended use of the server files when installed on a terminal server.)

15. Run the file “\LiberRATE MUS\libr_main.exe:- The following dialogue will appear

- You can run this from The <All Programs> list from the start button
- You should add a shortcut to your desktop for each server user



There are now two options for users:-

Users running from the terminal server

Your licence will have been set for a maximum number of simultaneous users

Users should use the Terminal server desktop created shortcut to start the program

Users logging in to the terminal server should run the program from the shortcut created on the terminal server.

Users working on the local environment should run the program from their client machines.

16. You must now install the multi user client file on each client machine. See below

Firewall notes for Option B only

The installation will configure your firewall and allow access via port 10589 if you have been given a network key for a terminal server. In most cases you needn't need to be concerned with this issue.

If this hasn't been done automatically please allow network traffic at this location.

Sharing (for all installations)

- Shares and read write access should be set up automatically directory where you have installed your data (Jobs and Library databases).

Read Write Access (for all installations)

- This should be set by the program installation but if you are having problems you should check that this is set.
-

SECTION 2 – ONLY IF YOU HAVE INSTALLED OPTION A CLIENT FILE INSTALLATION

To be installed on each PC accessing the shared database.

MULTI USER CLIENT INSTALLATION (MUC)

You will need this file: libr_muc_install_4.exe (MUC = multi-user client file)

Close all programmes until you only have your desktop showing on your screen.

1. Locate the file which you have downloaded
2. If you have downloaded the programme from our website then it will be in your default download directory usually Documents\downloads
3. LiberRATE will then begin to load onto your computer.
4. You will be asked to accept our **Licence Agreement**.
5. The following screen contains **Installation Notes** (see appendix 2).

6. You will be asked for confirmation to create a LiberRATE directory on your computer. The default position is on the C drive (C:\Program Files or (x86)\LiberRATE) - if you would like it created elsewhere then adjust the programme path by using [Browse].
7. You will be asked to identify the folder on your Server where the Multi-User Server database has been previously installed. Use [Browse] (and browse via Network to find this programme and select the LiberRATE MUS folder, click [OK] then [Next].
8. LiberRATE will install and will indicate when it has been installed successfully (usually takes approximately 1 minute).
9. Close down the installation programme by clicking [Finish]. There will now be a "LiberRATE" symbol shortcut on your desktop - Click on this and you will be asked if you wish to activate your licence.

(Alternatively: - Use [Start] > [Programs] > LiberRATE V4 Multi-User Client)

10. You will be asked to choose an installation type
11. Install as a trial and we will upgrade your system before your trial ends if appropriate.
12. If you have supplied with a key or are reinstalling please install as a Standalone and you will be asked for the key. If you don't have your key we will email it to you.

Activation

You will need to activate the program before it will run.

If you are already registered

If you are already registered please request your original key and install as a Standalone when asked.

If you are installing for the first time

If you are installing for the first time please install as a Trial

You will be asked to register and a verification email will be sent to you. Once you have verified your email address by clicking on a link sent to you your program will start. You are now ready to **Login**

LOGIN

To start LiberRATE double-click on the green icon on your desktop. Your system is delivered with the following user information set in so use these to login for the first time.

User Name	Superuser
Password	Demo

You can add yourself or others by this using the Menu [Admin]> [Admin Program] and add/delete authorised users as appropriate from the menu if security is an issue. We would recommend at least having your own login name as it is easier to remember than "superuser"

Check your version

You can check version numbers Installation paths etc via the Help/About accessed from within the program and then the Information button shown on that dialogue.

For further information see [User Levels and Security](#).

Licence agreement

Use of the system implies your agreement to all copyright conditions and full agreement to the licence conditions for this software. A copy of the licence agreement is in the online manual and you agreed to these conditions at an earlier stage of the installation.

SUPPORT

Support on LiberRATE is available to you on an unlimited basis. We can offer support by telephone and online.

Please contact LiberRATE Estimating by:

Tel +44 + 01252 795030
Email: info@libr8.co.uk

A QUICK RUN THROUGH THE SYSTEM

OVERVIEW

See the Tutorial for details

IMPORTANT KEYS

The following are the most commonly used keystrokes. All of the following functions are duplicated in the Menu or by using the Icons. Hover over the Icons on the toolbar to see a description of its use

F12	= Append new record
Insert	= Insert new record
F9	= Retrieves an Item or a resource to the relevant library depending which screen you are on
F10	= Saves an Item or a resource to the relevant library depending which screen you are on
Ctrl+Del	= Delete record
Ctrl+S	= Save your last entry

When the Ctrl key is used this is used, press this simultaneously with the key indicated keeping both keys depressed.

(A record is any new line of information)

A Basic Build-Up

This section provides an overview of the LiberRATE estimating system concept. Please see the Tutorial in the next section for more detailed step by step information

1. Start the program
2. Enter your User name and Password The system is despatched with the following
User name - Superuser
Password - Demo
3. On the Job Screen: Select an existing Job or add a new job (MENU >JOB>Create new empty Job)
4. Set up the default labour per hour rate in the **Labour Rate** box. *This rate will be reflected by default in every labour record in this Job. You can change the default at any time and all labour records will update accordingly. You can use other rates from the labour library as well. These rate will be linked to your library and reflect any changes made in the library when you run connect*
5. Set up the hours per day in the **Hours\Day** Box. *At any stage you will know exactly how many mandays are allowed in your Job*
6. If you want to at this stage, set in the Job mark-ups on the various resource types
7. Press the I Icon to go to the Items screen (Bill of Quantities)
8. Add a new Bill item F12 (to append) or INSERT
9. Add a Description in the Memo Box
10. Add a Code Quantity and Unit

11. Go to any of the resource screens (Materials, Labour, Plant and Sub-Contractor (Click the Tab or the M or L or P or S Icon or press ALT+M (or L or P or S)
12. Add an new line (F12)
13. Add materials as required to build up the item (F9 searches the active Resource Library Br and F9 whist on the material screen would bring up all of your materials starting with Br (such as bricks)
14. Add a quantity or use the take off pad to calculate your take offs and input a quantity for you
15. Go to the other resource screens for this bill item (Click the Tab or the L Icon or press ALT+L
16. Add a new line (record)
17. Add the necessary labour tasks to build he current Item The Default labour Rate is set on the Job Screen but you can use F10 to access the Labour Library and use different rates
18. Go to Plant (Machinery) and Sub-Contractor resource screens in the same way (By Icon or by clicking the tab or ALT+P or ALT+S)
19. Run Connect from the menu or Icons to update your Job with any changes you may have made in the resource library
20. Save the built-up item to the ITEMS LIBRARY to use it in future on another Job.
21. Set or adjust Job Mark-ups on the Job Screen
22. Set or adjust Item mark-ups on the Items screen. if you want to mark this item up individually
23. View profit margins and profit values on screen and adjust as necessary
24. View rounding errors and compensate by increasing the amount of decimal places displayed
25. Print Reports to your printer or direct to your fax (e.g. Travis Perkins collated materials for this Job)
26. Download Reports to your spreadsheet or Word Processor
27. Run a duplicate Job to manage and control the management of your project once you have been awarded the contract
28. Download Reports to your spreadsheet or Word Processor
29. Run a duplicate Job to manage and control the management of your project once you have been awarded the contract.

GLOSSARY OF TERMS USED IN THIS MANUAL

Append	Add to the end of
Insert	To place between.
Field	A single box for inserting or displaying information on a record e.g. Description or Quantity or Unit
Record	A row of information consisting of a number of fields
Database	A collection of records
Tab	The key on your keyboard with the opposing Left right arrows. Next to the Q
Build-up	The process of adding resources to a task in order to define all of the requirements to do that task
Resource	Materials Labour Plant or Sub contract details required to perform a task
Item	A collection of resources
Mark-up	The percentage which is applied to the cost to arrive at the sell price for the job
<input type="checkbox"/> MCD <input type="checkbox"/> Main Contractors Discount <input type="checkbox"/> MC Disc	This allows for main contractors discount. It adds on a specified amount which will later be deducted as a discount

CONVENTIONS USED IN THIS HELP

The following terms are used:

Mouse:	Use your mouse to perform this function
Keyboard	Use your keyboard to perform this function
Ctrl+Key	Press Control+Key simultaneously on your Keyboard e.g. Ctrl+Delete
Menu>Jobs>Delete/Reorder Jobs	This means:- from the menu bar ,Select <i>Job</i> >Then Select the Jobs option> then select the Delete/reorder Jobs option
MLP and S	Materials, Labour Plant and Sub-Contractor
Resources	Materials, Labour, Plant, Sub-Contractor
MENU >	Access the command through the menu bar
Ctrl + Key	Use these keys simultaneously keeping the Ctrl Key (or Alt or Shift key depressed whilst the other key is depressed.
RUN:	<p>This means that you should either:-</p> <ul style="list-style-type: none"> ✓ Press your Start Button ✓ Select Run ✓ Browse and select the appropriate drive (e.g. D:\Setup.EXE) or ✓ Locate the file referred to using Windows Explorer. With the required file highlighted, press Return or double click the file with your mouse. <p>The above for installation purposes only</p>
RUN	Whilst in the program means that you should Run a pre-set menu command from the LiberRATE menu
<Enter>	Press your Enter or Return key
<u>Underlined text</u>	Refer to more detailed help elsewhere in the manual on the underlined subject

CUSTOM VIEWS

This feature allows you to reorder any of the grids and see information most useful to you at the time. It also applies to the forms from which you are selecting or changing jobs and the library forms

You can set up custom views on all of the screens using the procedures below

Procedure to reorder the grids

1. Place your mouse onto the column heading
2. Click and hold your left mouse key
3. Drag the heading to the desired position

Procedure to make the columns wider or narrower

1. Place your mouse cursor at the top of the screen over the column headings
2. As the cursor passes over the divider line the cursor will change to <||>
3. At this point, drag the column widths.

You can view the screens with or without colours

Menu>File>Options>Select the Colour coding check box

On the Items screen you can set the horizontal and vertical splitter bars to allow more space/less space for the resource screens

You can widen or make narrower the Items grid and description box

To change these views move your mouse slowly over the sections that divide the various parts of the screens. When your cursor changes to <||> or =^=, drag the splitter bar to the required position.

You can reset the views to LiberRATE defaults using Menu>View>Default layout

WHAT TO DO IF...

A Job is not visible to you.

- ✓ *Your user level may be below the level for that Job. Reset the user level of the Job or request the user with access to that Job to reset the user level to your level*

Your screens are larger than your computer screen and you have to use scroll bars to see the LiberRATE Screens.

- ✓ *Reset your screen resolution to 800 x 600 minimum. This can be done in control panel or by right clicking on your desktop and selecting properties.*

You cannot find where you stored calculations on a take-off pad

- ✓ *Preview or print the report that provides this information*

You imported a Job but the resources do not have a Y set against them

- ✓ *These resources are not found in your library in the same format as the library from which you exported the Job.*
- ✓ *You can save each individual resource to your library*

You have changed details of a resource in the resource library but the details of that resource have not updated in your Job

- ✓ *Run Connect from the Library Menu to update the current Job only*

You don't like the order of the grids on any forms

- ✓ *Reorder the grids using your mouse. Set up the title positions and the widths*

There is a difference shown in the difference box on the Job screen

- ✓ *Increase the decimal places of the Money Using File>Options>Money Tab until the difference is minimised*

You see that the Total as shown on in the resource totals box on top of the items screen is different from the total in the Totals field for that resource.

- ✓ *Increase the decimal places as above*

You want to display the currency symbol

Set the currency symbol in the options box. The default setting as taken from your Control panel International settings is displayed

You need to rearrange the order of records on the Job list

- ✓ *Use the reorder function from the Job screen Job menu*

You need to rearrange the order of records on the Items list

- ✓ *Use the vertical arrows at the bottom of the Items or resource screens*

You need to rearrange the order of records on any resource section

- ✓ *Use the vertical arrows at the bottom of the Items or resource screens*

You saved an Item to the items library but can't remember under which category you saved it.

- ✓ *Use different search filters. Try searching by description. And enter any Keyword that may be in the description line for that item*
- ✓ *The forms all seem too big for the screen*
- ✓ *Your screen resolution is set to less than 600 x 800. Set your screen to 600 x 800 using your right mouse from your desk top or from control panel*

You want to navigate back to the description on the Items screen without using your mouse:

✓ *Alt+D*

You wish to mass delete a list of resources from the library.

✓ *From Admin> Resource Library: Search the library by Category or by Supplier. Hold down your Ctrl+Delete Key and the list will delete record by record. It is fast though.*

SAVING

YOUR LAST ENTRY OR EDIT IS NOT SAVED AUTOMATICALLY.

- ☐ Newly created records are automatically saved on creation of the next record. (A record is any new line of information on any screen.)
- ☐ If you wish your information to update before you create the new record press Ctrl + S
- ☐ If you wish information to update immediately press Ctrl +S
- ☐ In order to save the last record press Ctrl + S
- ☐ Each time you create a new record, the previous record is automatically saved.

THE JOB SCREEN

This is the information screen that is displayed on entering the system and contains information about the current active Job

- ✓ Select Alt+I or the I icon to see the items that make up this Job
- ✓ Change to or create another Job using the Menu>JOB from this screen

Parts of the Job Screen

This screen provides you with information about the current selected Job.

The Icon Toolbar and Menu.

Allowing your mouse pointer to rest over an Icon will bring up a description of the Icons function. Further information is simultaneously displayed on the status bar at the bottom of your screen. Menu functions may be accessed through the keyboard by pressing ALT+UNDERLINED LETTER e.g. ALT+F will open the File menu.

(Most other Job screen functions are accessed from the Menu under the Job section Menu function. See below for further information.)

The screenshot displays the 'Job Screen' interface with the following sections:

- Job Description & Details:**
 - Job Name: Landscape construction sample
 - In Folder: \SuperUser\External Works Sample
 - Start Date: [] Level: 5
 - End Date: [] Status: []
 - Comments: [] 1 Change...
- Job Settings:**
 - Mark-Up:
 - Materials: 20% Plant: 20%
 - Labour: 25% Sub-Cont: 10%
 - Overhead: [] Discount: []
 - Labour Settings:
 - Hours/Day: 8 Labour Rate: 20.50/Hr
 - 2 Job Options... 3 Change...
- Job Totals:**

	Cost	Profit on Res. with Job MkUp	Profit on Res. with Item MkUp	Sell
Materials	97,653.77	19,530.75	0.00	117,184.53
Labour	27,674.98	6,918.74	0.00	34,593.72
Plant	4,470.99	894.20	0.00	5,365.19
Sub-Cont	4,000.00	400.00	0.00	4,400.00
All Resources	133,799.74	27,743.70	0.00	161,543.43

Provisional Sums: 15,000.00 15,000.00

Cost Total: 148,799.74 Sell Total: 176,543.43

Overhead Value: 0.00 Discount Value: 0.00

Items Total: 176,543.37 Difference: 0.06

Grand Total: 176,543.43

Total Man-Days: 168.75

This job was created on 30/03/2013 by Sam.

Description of Job Screen Components

THE JOB DESCRIPTION BOX

This shows the active and currently selected Job

JOB DETAILS

The Details shown relate to the selected Job only.

Start Date and End Date

This is user driven information that may be used as reminders or tracking information

THE DEFAULT LABOUR RATE

The value that is set in this box is the labour cost per hour that will be brought down by default into each new labour record. See detailed notes in the Labour and Labour Library sections of this manual

HOURS /DAY

The figure that is set in this box will have an impact on the total Man Days report Box on the Job Screen. The Hours per day can be changed to accommodate for travelling time or seasonal work.

THE MARK-UP % BOXES

Tab or mouse click to the boxes on the Left hand half of your screen

Set a value in each of these boxes

You can set multiple decimal places to fine tune your final sum

If there is not a value in the box the value will be 0%

OVERHEAD

Adds overhead as a % of resources cost

Resources in your job that are individually marked up are excluded from overhead. You should make any adjustments as necessary to cover these excluded items

Example

If a value of 30 is placed in your labour mark-up box (i.e. you wish to mark up the labour in your Job by 30 %)

All labour resources in the job EXCEPT those flagged individually for item mark up or provisional sums will be subjected to the following:

$$\text{Labour Resource Totals} + \frac{(30 \times \text{Resource Totals})}{100}$$

or

$$\text{Resource Totals} \times 1.30$$

MCDisc%

Main contractors Discount %

This allows for main contractors discount. It adds on a specified amount that will later be deducted as a discount

Comments

Type in any comments you wish regarding this Job

JOB TOTALS

Cost

The cost of all the resource types in this Job

MkUp%

The average percentage mark-up on this resource type. This may be influenced if you have individually set some resource types as provisional sums or flagged a resource for Item mark up. Please see detailed information on these features

There is a report that allows you to analyse these details

Profit

This shows you the profit that you are making on this Job

Sell

The Cost plus the profit

RESOURCE TOTALS

This shows the total cost and marked up value of the resources in your Job

PROVISIONAL SUMS

Resources flagged in the Item resource screens for "None" mark-up are classified as Provisional sums. These are not subjected to mark-up or discount and are added on with their nett values a collection of all of the Provisional sums in your Job

Total

Costs + Provisional sums

Sell + provisional sums

With Discount

If there is a figure in the discount box (MCDisc %) - The Job Value + The discount value of the Job is shown in this box.

Items Total

LiberRATE calculates in a unique way to allow accuracy for those trades which may be working with very high quantities at very low rates. (Grounds maintenance for example)

This facility allows you to compensate for rounding differences that may occur

This box reflects the total of the bill of quantities items added together.

There are 2 calculations taking place at any time:

The Materials + Labour + Plant + Sub-Contractor

and

The total of the Items on the Items screen

This system highlights any rounding differences that may be occurring

So let us assume that in a build up

Quantity = 10000

Materials = 50.00 Labour = 600.00 Plant = 300.00

The Resource Total is 950.00

If the decimal places on money are set in your Options to 1.00, (2 decimal places) then your items total will read:-

$950.00/10000 = .09$ and then $.09 \times 10000 = 900.00$

There is a 50.00 rounding error which is shown in two places

- 1 The totals box at the top of your items screen will not = the Items total for that item
- 2 There will be a difference shown in the Difference box on the Job screen which will include the 50.00 rounding errors. (Other rounding errors may compensate for this error)
- 3 To correct or compensate simply increase the Decimal places shown under money in your Options Menu (File >Options) to an amount which minimises the difference.

DIFFERENCE

This box reflects the difference described in the section above titled Items Total. The value in this box should be as low as possible. Adjust this value by increasing the number of decimal places under Money in the Options box.

To correct or compensate simply increases the Decimal places shown under money to an amount which minimises the difference.

DEFAULT LABOUR RATE

1. The default labour rate is the rate that is used whenever you create a new labour record.
2. Every labour record must have a default labour rate or a library labour rate.
3. The default labour rate is set in on the Job screen
4. When you change this value on the Job screen all of your labour items using the default labour rate will update to the new default labour rate.
5. The default labour rate shows up as (Job) in the code column of the labour Resource
6. screen.
7. Any other labour rate will show up with its library code.
8. You therefore have a reference on every rate used.

If you prefer to set Days instead of Hours as your default labour Rate

Set your day rate in the Default labour rate box on the Job screen

Set the Hours per day value to 1

The unit on your Job screen will still read hours but the man-day count will be correct.

Using the Labour Library

See Labour resource library

OTHER FUNCTIONS ACCESSED FROM THE JOB SCREEN

CREATE NEW EMPTY JOB

1. On the Job screen
2. Menu>Job>Create new empty Job
3. Choose A Normal Job (see below for Master Jobs)
4. Press finish
5. Place a title in the description box and your mark-ups /labour rates etc by pressing buttons 1,2,3 and begin work on the new Job
6. Note: Your default labour rate may be set up Via the Options button accessed from the Job screen.

MASTER JOBS AND SUB JOBS

A master job is simply a file which holds a number of sub-jobs. The reports produced by the master job enable you to see the resources for a number of jobs together or issue a B/Q of a number of collated sub-jobs.

1. Create your sub jobs and then create a new Master Job
 2. Sub Jobs e.g. Preliminaries, Earthworks, Concrete, Brickwork, Soft Landscape etc
- or
3. All jobs currently out on tender (so that you can assess your workload)
- or
4. All won jobs for the next month. (so that you can assess your Material , Labour, Plant requirements for next month)
5. You can then run reports to ascertain your total requirement on say bricks or labour or hired plant for the period chosen.
 6. Please note that you cannot alter information in a master job. You have to open the sub job to alter or amend information.
 7. We strongly suggest that if after making alterations you wish to refresh the master job that you use the Refresh Master Job function found on the Job menu under File in the master Job.

Procedure for creating a Master Job

On the Job screen:-

1. Menu>Job>Create new empty Job
2. Choose A Master Job (see below for Master Jobs)
3. Press finish
4. Place a title in the description box and your mark-ups /labour rates etc by pressing button 1.
5. Now simply add the sub jobs to the master Job by pressing the “3” button and “Add”
6. The sub jobs will be added in the order you select them.
7. You can change the order of the sub jobs by using the yellow up/down reorder arrows whilst in the “Change” Jobs dialogue (button no 3)
8. It may be useful to note that a sub job can be part of more than one Master Job scenarios

RE-ORDER JOBS

You may have a high number of Jobs on your Job list and wish to see those with a higher priority or in a different order on the list

Procedure

Select Menu>Job>Delete/Reorder Jobs

1. If the screen is not maximised it use the Maximise button at the top right of the screen
2. You can then see information about each Job which will allow you to select the Job or Jobs you require effectively See also [Custom views](#)
3. On the Delete/Re-order Jobs screen a grid is shown. Information provides is as follows:
 - ☐ Description
 - ☐ Level
 - ☐ Start date

- ☐ End date
 - ☐ Comment Created on
 - ☐ Created by
 - ☐ Last modified on
 - ☐ Last modified by
4. You can set up this grid in terms of grid width and column position by dragging the column widths or reordering the column titles at the top of the screen.
 5. Use the blue vertical arrows in the bottom right of the screen to move a selected Job to a higher or lower place on the Job list.
 6. Press Ctrl+J or the J button to return to the Jobs screen

CREATE A DUPLICATE JOB

You can copy an existing Job and make a duplicate of it.

This allows you to leave your original estimate intact and make any changes in the new copy

Procedure

From the Job screen

1. Menu>Job>Create Duplicate Job
2. Select the Job you want to duplicate (see also Custom views)
3. You can view more lines of text by selecting the Double Height button on the bottom right of the screen
4. You can see more of the details of the original Job by sizing the columns or reordering the columns of the grid on the Choose a Job screen See Custom Set-up
5. You can see more of the details of the original Job by sizing the columns or reordering the columns of the grid on the Choose a Job screen See Custom Set-up
6. Double click or press OK
7. You will be prompted to rename the Job
8. Rename the New Job in the Description Box.

DELETE JOBS

Deleting cannot be undone. We recommend you **Export** to a backup before deleting Jobs

Procedure

From the Job screen

Menu>Job>Delete/Reorder Jobs

1. Select the Job or Jobs you want to delete
 2. You can view more lines of text by selecting the Double Height button on the bottom right of the screen
 3. You can see more of the details of the original Job by sizing the columns or reordering the columns of the grid on the Choose a Job screen See Custom Set-up
- ☐ Description
 - ☐ Level
 - ☐ Start date
 - ☐ End date
 - ☐ Comment Created on
 - ☐ Created by
 - ☐ Last modified on
 - ☐ Last modified by

4. Double click or press OK
5. You will be prompted to confirm the delete
6. Press Ctrl+J to return to the Job Screen

JOB MARK-UP

1. Job Mark-up refers to overall mark-ups as set in on the Job screen
2. Items are marked up by the percentage as set in on the Job screen in the Mark-up box.
3. You must set a percentage against each resource on the Job screen. Leaving the box blank will default that resource to a 0% mark-up.
4. Items can also be marked up individually at Item level. Any item that is individually marked up is excluded at resource level from the Job mark-up.
5. If an Items resources are individually marked up, only those items are excluded from the Job mark-up.

Please see the Notes in the Items screen section for *Item Mark-up*
 You can get an analysis of this by printing the report titled Item mark-up.

MAN-HOURS AND MAN-DAYS

A man-day is a collection of man-hours

The amount of man-hours in a man-day is dependent on the Hours per day you have set in on your Job screen.

This is a useful tool for evaluating how long a Job will take to do.

The figure shown in the man-days box on the Job screen is inversely proportional to the Hours/day.

As the amount of hours in a day increases the man-days for the Job or the Item will decrease

The man-hours are the amount of hours x the number of men

Man-hours are shown at the Resource level e.g. 2 men for 3 hours = 6 man-hours

Man-days are shown at:

The Items level: This collates all of the man-hours on the labour resource screen for that Item and shows the total amount of man-days

The Job level: This collates all of the man-days in the individual Items and shows the total man-days for the Job.

Example

You have a Job where you have set in the amount of hours per day at 8 hours.

The Total man-days reported on the Job screen is 100 days (800 hours based on all of the individual labour resource hours).

Due to a change in programme of the Job you will now be doing the Job in Winter where there are fewer working hours in the day.

Change the Hours/Day to 6.5 (and press Ctrl+S) to save the change

The Total man-days will now report 123.08 days (800/6.5)

Note

If you prefer to work in Days rather than hours:

On your Items screen to can set the Default labour rate to a day rate

Set the hours per day to 1

The labour resource screen will still report the unit as hours however, but the unit at Items and Job level will be correct.

BACKING UP YOUR DATA

IMPORT AND EXPORT YOUR JOBS DATA

BACKUP DATABASES

SHARING FILES WITH OTHER USERS

DATABASE MAINTENANCE

Please note on the personal edition your data is held in two folder called Jobs and Library

- The Databases are installed to the folder C:\Users\user_name\AppData\Roaming\LiberRATE (you cannot vary this)
- LiberRATE must be closed when you move or back up this data
- If you are moving your data from Personal to Multiuser, this is the only data you require once you have completed the installation

You can use Import and Export to move Any Job, a selection of Jobs or all Jobs to a backup file for safe storage or to Import the Job or Jobs onto another computer.

We strongly suggest that you backup regularly especially whilst working on large projects to safeguard your work and prevent loss of data from possible file corruption or hard disk failure.

Method 1

Using the LiberRATE Internal Backup System.

This will back up your Jobs and remove any errors from your files. This is the safest backup system. It will not backup your library. Use method 2 below for Library backup

On the Job Screen /Job>Export Jobs or Export All Jobs

Export Jobs

You can export **One** or **Many Jobs** in a particular folder - You cannot export many jobs in different folders.

Export All Jobs

Exports all jobs on you current system (You lose your folder structure in the back up file but all jobs are backed up)

Backing up does not modify any of your data in your databases – It just makes copies

To Export specific Jobs or Jobs in a single folder

1. From the Job Screen/ Menu/ Job: Select Export Jobs
2. Choose the Job or Jobs that you wish to export.
3. A dialogue will appear prompting you to name a file
4. Type a file name in the name box. (example:-14February or JobName)
5. Select a location for the export. (My Documents or Desktop etc.)
6. Press Save
7. Your Job(s) will be exported to a new file with the name that you selected and an lji extension e.g. 14Feb.lji
8. You can also export directly to a memory stick the Save In box at the top of the Export file dialogue and specifying the USB or drive with your memory stick as the location for saving your file.

To Export all of your Jobs

Note: This operation will back up to a single file. The file will not preserve the folder structure as existing in LiberRATE.

You will not lose or alter the information in LiberRATE but when you do re-import the Jobs they will all be in one folder.

Procedure

1. From the Job Screen/ Menu/ Job: Select Export **All** Jobs
2. Proceed as per items 2-8 above

To Import Jobs

1. You can Import from a back-up (Export file) on your local drive, CD or a backup on a network
2. You can Import from a CD or memory stick.
3. You can import from another machine on the network.
4. We always recommend that you create a new folder for your imported jobs. You can then use the Jobs Organiser to re-order your imported jobs.
5. When importing you will be given an opportunity on the Import dialogue to create a new folder.

Notes

1. Imported Jobs are automatically connected to your library unless the Jobs were created on a different LiberRATE Installation
2. LiberRATE will check to see if the resources in each job are found in the library with the same identifier as the source library of the Job.
3. If the identical item is found the resources will connect to the library.
4. If the Job cannot find the exact correct library item it will notify you when you open the Job
5. At this point you can run the connect function from the menu to reconnect the Job the Item, or the Resource back to the library.
6. If you connect to a library and the resource is priced a different price in the new library from the original library, the value of your Job may change.
7. You can duplicate a job on your system using duplicate functions in LiberRATE and then compare the connected Job to the disconnected Job
8. You will receive a report of which resources have not managed to connect. At the end of the import you will receive a report which tells you which of the resources in the imported Jobs were not found in the library. This information can be successively copied to the clipboard. **See below**

If you have exported your Job from one machine and are importing it to another machine the only way you can connect is if the libraries on both machines are the same. There is no way within LiberRATE of copying libraries. You must use Windows File copy functions for this.

You may however copy one computers library database to a second computer.

Be careful. You will overwrite all existing information in that machines library. Please call us for advice.

Method for Importing previously backed up LiberRATE Jobs

1. From the Job Screen: Select Import
2. Use the "Look in" dropdown box to go to the location of your previously exported files or you're a drive or the drive on your network which contains the exported file
3. A dialogue will appear prompting you to select a lji file from the list.

4. Select a file name in the name box. (example:-14February.lji or JobName.lji)
5. Press Open
6. A dialogue will appear showing you which jobs are contained in the backup file. You cannot choose one or many from the list. The whole list of Jobs will import
7. You can create a new folder to import the Jobs to and then use Jobs/ Jobs organiser to move/delete jobs.
8. The Jobs will be imported and you can access your revised list of Jobs through Menu>Job>Open Job.
9. Your Job(s) will be imported and appended at the bottom of the list of existing Jobs on your system.
10. The date of the import will appear alongside the imported file for reference.
11. Imported files will not overwrite existing Jobs with the same name.
12. On opening an imported file you must run the connect function on the items menu if you want to update any resource price changes in the Job.
13. You can reorder the grid on the Select Job screen which shows your Jobs by dragging the titles
14. You can size each individual column by dragging the width of the column at the vertical line which separates the titles of the individual columns.

COPY TO THE CLIPBOARD

**When you IMPORT from an EXPORT file you may get a messages alerting you that some resources are no longer connected to your library
This means that these resources will not automatically update if you change details about them in your library and run CONNECT**

Copying this to the clipboard allows you to store this information on a text or word processor file for later use

The clipboard is essentially your computers short-term memory

When you copy to the clipboard you are telling your computer "Remember this for a while, I'm going to ask you about it in a few minutes"

You ask your computer about what's in its memory by pasting its memory onto your word processor or Notepad

Every time you copy additional information to the clipboard, the previously copied information is overwritten

You must therefore Paste (Ctrl+V) the current information into your text document before you copy further information to the clipboard.

Open WordPad, Notepad or your word processor

Use that applications paste functions to paste the clipboard contents

You can now copy further information to the clipboard and paste below the information you have already pasted.

Remember that any further Copy to Clipboard commands will overwrite the current contents of your clipboard. We therefore recommend that you Paste the clipboard immediately if you wish to keep a record.

METHOD 2 - USING MY COMPUTER

BACKUP YOUR DATA FILES – THIS IS IMPORTANT. DO IT REGULARLY

- Backup your Jobs and Library regularly using Windows File Explorer. Simply make a copy of the folders on another drive or a CD. This method takes you entire Jobs and Library databases as they are at the time and allows you to store them.
- The easiest way is simply to make a copy of the folders below and store them in a separate directory.

LiberRATE must be closed when you do this.

RESTORING OLD DATABASES FROM A SERVER.

1. Replace the Jobs and Library folder in the locations as shown above but this will overwrite and you will lose your existing data.
2. LiberRATE will only read folders called "Jobs" and "Library"
3. If you wish to temporarily restore an old back-up, rename your current folders to (for example) Jobs 1 and Library 1. They then become invisible to LiberRATE.
4. Paste the old Jobs and Library
5. Get the information you require and export it using the LiberRATE internal Export Jobs functions.
6. Restore the current data folders by renaming them back to Jobs and Library respectively. You will also have to rename or remove the recently restored data files.
7. Import the exported data into your current file list.

LiberRATE must be closed when you do this

FILE LOCATIONS

Personal Edition

- The program is installed by default to the C:\Program files\ or (Program files X86) directory (You can vary this)
- The Databases are installed to the folder C:\Users\user_name\AppData\Roaming\LiberRATE (you cannot vary this)
- Note- This is a hidden directory and you would need to Use >Windows View Options>Show hidden files and folders.
- Please ensure you back up the Jobs and Library folders found as above - regularly
- The licence is installed to the directory C:\ProgramData\JR

Multi-user Edition

The path to the databases is user selected and may have been renamed from the defaults on installation

The default path for the data files is either:

\Server Name\ LiberRATE \LibV4MUS\Library
\Server Name\Program files\LibV4MUS\Jobs

It is highly likely that on installation you changed the default location so:-

If you are not sure where the server files are stored, you can see this by starting LiberRATE and looking in Help/ About.

Press the blue i button and look down the list for these paths.

See also Import and Export

THE ITEMS SCREEN

This section contains an initial overview. Detailed explanations follow

Summary boxes for this item

Resource Totals M: 1,141.70 L: 1,698.46 P: 0.00 S: 0.00 All: 2,840.16

Task description
Quantities and costs

Code	Quantity	Unit	Rate	Total	Man Days	No
6.4	20.00	m	53.72	1,074.40	1.52	41
6.5	5.60	m	30.10	168.56	0.43	42
6.6a	49.00	m2	134.75	6,602.75	16.90	43
6.6b	3.90	m2	130.00	507.00		44
6.7	34.00	m2	83.53	2,840.02	10.31	45
7						46

Re-order/ bookmark

Materials (5) Labour (4) Plant (0) Sub-Cont (0)

Description	Quantity	Unit	Waste %	Qty.i.Wst	Rate	Total	Lib	Comments
Brick PC 600/1000	404.00	nr	5	424.20	0.60	254.52	✓	Edge
Brick PC 600/1000	1,077.00	nr	5	1,130.85	0.60	678.51	✓	Infill
Mortar pointing BoE 215 (.0083m3/m2)	0.04	m3	10	0.05	120.00	5.61	✓	
Cement 25 Kg	36.72	bags		36.72	3.89	142.73	✓	
Sand Soft	3.09	tonne		3.09	19.50	60.33	✓	

Resource Screens
(Materials only shown here)
Tabs show Labour Plant and sub-contractor resources for this item

Mark-Up: Job (20%) 1 Change...

Item Mark-up

External Works

This is where all of your Job build-up will take place

The Item screen consists of 2 basic parts

The Items Screen; This is your Bill of quantities on the top half of the screen and consists of one or many Items each with one or many resources

The Resource Screens: The four possible resources that make up any Item.

Materials

Labour

Plant (Machinery)

Sub-Contractor

These four resources are found in the bottom half of the screen on separate tabs.

Click a tab to view the contents of the resource screen

Additionally there is a tab for Item Mark-up. This will exclude the resources selected from any Item Mark-up as indicated on the Job screen.

SET UP PREFERENCES

You may customise your screen using the horizontal and vertical splitter bars under the items section.

You may set up the individual columns on the Items and Resource screens by dragging the column headings to the order of your choice.

See Custom Views

These set-ups will remain in place until you run Menu >View>Restore Default layout.

NAVIGATION

F12 to append a new record

INSERT to insert

Ctrl+Delete to delete a record

Use tab or Return (Enter) to navigate

Use Alt +D to return you to the Description box

BOOKMARKS

Use the bookmark function at the bottom of the Items section of the Items screen to bookmark an Item.

Once you have book marked an item the Jump to bookmark icon lights and using this you can jump from any item to the book marked item

REORDER ITEMS

Use the vertical arrows at the bottom of the screens to re-order any item or resource.

INDIVIDUAL MARK-UPS

You can set individual mark-ups for this item if you wish to vary the mark-up for this Item only. The global mark-up is set in on the Job screen.

SPELL CHECK

This is found under the Edit menu or Control+ F7

MATERIALS

Alt+M

- ☐ To add materials to your materials list F12 to create a new record
- ☐ Type a description
- ☐ Type a quantity
- ☐ Type a unit
- ☐ Type the default waste
- ☐ Optionally add this new material resource to the materials library F10

USING THE MATERIALS LIBRARY

1. You can retrieve materials directly from the materials library. F9
2. Type the first few letters of the materials description and press F9
3. or press F9 to search on a blank description and then use the library filters.
4. Materials retrieved from the materials library will be linked to your Job from the library. If you update details about the material in the library all instances of the material in your Job will update WHEN YOU RUN THE CONNECT FUNCTION.
5. You can see if a material is connected to the library. If it has a Y in the Lib (library) field. having a Y would not necessarily mean that the resource has updated only that it has the ability to update if you want it to.
6. If you open older Jobs that used the same material resource, these can optionally be updated to the new library details by running CONNECT from the menu
7. Always run CONNECT before submitting your final quotation
8. You can enter resources and not save them to the library.

Notes

- ☐ Materials are one of four possible resource types in any Item build-up .
- ☐ Once you have created an Item, select the materials screen for that item and input the materials required.
- ☐ You can type the required materials directly onto the form,
- ☐ Materials that are retrieved or saved to the library will have a Y symbol in the lib field on the form to indicate that they are a library resource.
- ☐ Updating the resource details in the library will update all usage's of that material in your job once you have run the Connect function from Menu>Library>Connect and Disconnect
- ☐ You can reorder the materials on the form using the vertical arrows on the bottom of the form.
- ☐ You can assign an item mark-up to all of the materials in an item which will exclude those materials from the Job mark up and subject them to your chosen mark-up
- ☐ You can also select No mark-up which will designate the materials as a Provisional sum
- ☐ You can get printed reports of your materials for a Job.
- ☐ The "materials by supplier" report will only show materials that have a supplier name against them

LABOUR

Alt+L

The labour screen works slightly differently to the other resource screens.

Labour must either be a default labour rate record or a library linked labour rate

You cannot enter labour rates directly into the labour resource form

Labour rates are connected to the default rate and will update when you change the default rate on the Job screen

Labour rates from the labour library are connected to the library rate and will only update when you run CONNECT from the Library menu (if you have changed details of a labour resource in the labour library).

- ☐ To add labour to your labours form F12 to create a new record
- ☐ Type a description
- ☐ Type a quantity for the amount of men to do the task
- ☐ Type a quantity for the amount of Hours to do the task

TO USE MINUTES INSTEAD OF HOURS

Minutes must be expressed as parts of an hour. If for instance you are doing an ITEM build up and you wish to calculate for one unit so that the build up can be saved to the Items library and reused for any amount of Units in the future:

- ☐ Increase the decimal places for the number and money using the Options menu
- ☐ For 5 minutes: Type in the units as Men [1] - Hours [.0833]

LABOUR RATES AND THE LABOUR LIBRARY

USING THE LABOUR LIBRARY

If you do not wish to use the default rate on the Job screen

1. You can retrieve labour directly from the labour library. F9
2. Type the first few letters of the Labour description and press F9
3. or press F9 to search on a blank description and then use the library filters.
4. Labour retrieved from the Labour library will be linked to your Job from the library. If you update details about the labour in the library all instances of the labour in your Job will update WHEN YOU RUN THE CONNECT FUNCTION.
5. You can see if a labour is connected to the library by checking if it has a Y in the Lib (library) field. Having a Y would not necessarily mean that the resource has updated only that it has the ability to update if you want it to.
6. If you open older Jobs that used the same labour resource, these can optionally be updated to the new library details by running CONNECT from the menu
7. Always run CONNECT before submitting your final quotation
8. You can enter resources and not save them to the library.

Notes

- ☐ Labour are one of four possible resource types in any Item build-up.
- ☐ Once you have created an Item, select the Labour screen for that item and input the Labour required.
- ☐ You can type the required Labour descriptions but not the rates directly onto the form,
- ☐ Labour that is retrieved from the library will have a library code against it in the lib field on the form to indicate that that labour resource is a library resource and not a default labour item. The code also helps you to identify which labour resource type you have used.

- ❑ Updating the resource details in the library will update all usage's of that labour in your job once you have run the Connect function from Menu>Library>Connect and Disconnect
- ❑ You can reorder the Labour on the form using the vertical arrows on the bottom of the form.
- ❑ You can assign an item mark-up to all of the Labour in an item which will exclude those Labour from the Job mark up and subject them to your chosen mark-up
- ❑ You can also select No mark-up which will designate the Labour as a Provisional sum

You can get printed reports of your Labour for a Job.

PLANT (MACHINERY)

Alt+P

- ❑ To add Plant to your Plant resource form F12 to create a new record
- ❑ Type a description
- ❑ Type a quantity
- ❑ Type a unit
- ❑ Optionally add this new Plant resource to the Plant resource library F10

USING THE PLANT RESOURCE LIBRARY

1. You can retrieve Plant directly from the Plant resource library. F9
2. Type the first few letters of the Plant resource description and press F9
3. or press F9 to search on a blank description and then use the library filters.
4. Plant retrieved from the Plant library will be linked to your Job from the library. If you update details about the Plant resource in the library all instances of the Plant resource in your Job will update WHEN YOU RUN THE CONNECT FUNCTION.
5. You can see if a Plant resource is connected to the library. If it has a Y in the Lib (library) field. having a Y would not necessarily mean that the resource has updated only that it has the ability to update if you want it to.
6. If you open older Jobs that used the same Plant resource, these can optionally be updated to the new library details by running CONNECT from the menu
7. Always run CONNECT before submitting your final quotation
8. You can enter resources and not save them to the library.

Notes

- ❑ Plant are one of four possible resource types in any Item build-up.
- ❑ You can type the required Plant directly onto the form,
- ❑ Plant that is retrieved or saved to the library will have a Y symbol in the lib field on the form to indicate that they are a library resource.
- ❑ Updating the resource details in the library will update all usage's of that Plant in your job once you have run the Connect function from Menu>Library>Connect and Disconnect
- ❑ You can reorder the Plant resource on the form using the vertical arrows on the bottom of the form.
- ❑ You can assign an item mark-up to all of the Plant resource in an item which will exclude those Plant resource from the Job mark up and subject them to your chosen mark-up

- ❑ You can also select No mark-up which will designate the Plant as a Provisional sum
- ❑ You can get printed reports of your Plant resources for a Job.

SUB-CONTRACTOR

Alt+S

- ❑ To add Sub-Contractors to your Sub-Contractors form F12 to create a new record
- ❑ Type a description
- ❑ Type a quantity
- ❑ Type a unit
- ❑ Optionally add this new Sub-Contractor resource to the Sub-Contractors library F10. At the time of saving select one of your previously registered sub-contractor suppliers from the drop down list of previously registered suppliers

USING THE SUB-CONTRACTORS LIBRARY

1. You can retrieve Sub-Contractors directly from the Sub-Contractors library. F9
2. Type the first few letters of the Sub-Contractors description and press F9
3. or press F9 to search on a blank description and then use the library filters.
4. Sub-Contractors retrieved from the Sub-Contractors library will be linked to your Job from the library. If you update details about the Sub-Contractor in the library all instances of the Sub-Contractor in your Job will update WHEN YOU RUN THE CONNECT FUNCTION.
5. You can see if a Sub-Contractor is connected to the library. If it has a Y in the Lib (library) field. having a Y would not necessarily mean that the resource has updated only that it has the ability to update if you want it to.
6. If you open older Jobs that used the same Sub-Contractor resource, these can optionally be updated to the new library details by running CONNECT from the menu
7. Always run CONNECT before submitting your final quotation
8. You can enter resources and not save them to the library.

Notes

- ❑ Sub-Contractors are one of four possible resource types in any Item build-up.
- ❑ Once you have created an Item, select the Sub-Contractors screen for that item and input the Sub-Contractors required.
- ❑ You can type the required Sub-Contractors directly onto the form,
- ❑ Sub-Contractors that are retrieved or saved to the library will have a Y symbol in the lib field on the form to indicate that they are a library resource.
- ❑ Updating the resource details in the library will update all usage's of that Sub-Contractor in your job once you have run the Connect function from Menu>Library>Connect and Disconnect
- ❑ You can reorder the Sub-Contractors on the form using the vertical arrows on the bottom of the form.
- ❑ You can assign an item mark-up to all of the Sub-Contractors in an item which will exclude those Sub-Contractors from the Job mark up and subject them to your chosen mark-up

- ❑ You can also select No mark-up which will designate the Sub-Contractors as a Provisional sum
- ❑ You can get printed reports of your Sub-Contractors for a Job.

SAVING OR CANCELLING CHANGES

Save Changes Press Ctrl+S

Saves changes to your current record. Information is updated as soon as a save is performed.

If you wish to view the effects of changes you are making to a record save the changes to update the information

All information is automatically saved as you create a new record

Cancel Changes Ctrl+Backspace

You can cancel any changes made to the record that you are working on.

Changes are only saved once a new record is created or when you have saved the record using Ctrl+S.

Once a new record has been created you cannot undo the changes.

To cancel changes to the record you are working on.

IMPORTING A BILL OF QUANTITIES TO THE ITEMS

You can import a Bill of quantities directly to your LiberRATE Items. This is useful if you receive a schedule or Bill of quantities in any electronic format.

You can also scan a paper bill to an electronic format and then import it to LiberRATE

NOTES

- Note the target Bill must be in Excel Format
- The column order must be in the order specified in the wizard.
- The wizard will look at the Excel sheet and import all active cells. If any formatting exists in the cells it will assume that the cell has data. It is therefore a good idea to delete all rows after the required information to be imported otherwise LiberRATE will look for information possibly right up to row 1048000 (the current excel spreadsheet size). This can obviously be very time consuming.
- Excel cells can be active even if there appears to be nothing in them. This is caused by number formatting or borders which have not been used and may have been selected by the Excel author.
- Word tables and scanned documents may be converted to Excel format. Some excel knowledge is required.

METHOD OF IMPORT OF B OF Q

1. Ensure that the target Excel sheet is closed
2. From the Job screen in LiberRATE select Import BoQ
3. Follow the instructions of the wizard

THE TAKE OFF PAD



This feature allows you to record measurements or calculations

- ❑ Access the take off pad using the Icon on the tool bar whilst you are on any materials resource
- ❑ The take off pad is available against each record of material resources
- ❑ There is no limit to the amount of pads you can have in an item
- ❑ The pad calculations are stored for future reference
- ❑ You can place comments against any measurement within the pad by using ! (Exclamation mark) or ; (semi colon) to separate the comments from the calculations.
- ❑ You may use brackets as you would in any arithmetical function
- ❑ The total of the pad calculation is reflected in the material quantity field once you close the pad.
- ❑ You can overwrite this total and still retain the total inside the pad itself
- ❑ If you do not have a material resource against the calculation you should simply write a note to yourself against the pad quantity to remind you where the measurement is located.
- ❑ Example: "Volume of new driveway excavation"
- ❑ You can then place a unit but omit the rate.
- ❑ There is also a report to print pad measurements
- ❑ The pad measurement note will also appear in the Items details reports as a material if you have labelled it as such.

A typical pad calculation may look like this:

0.5*10*20 ! Top area
5+12-(3*1.2) ;Bottom area

Or, for example, if you are doing soil volumes and wish to use a bulking factor of 20% or a waste factor

12*3*1.2 or 12*3*(20/100) is not equal to 12*3*20/100

The following operators are supported

Addition	+
Subtraction	-
Multiplication	*
Division \	
Pi	Pi

LIBRARIES OVERVIEW

You have 5 libraries:

1. A built-up "Items" library
2. A Materials library
3. A Labour library
4. A Plant (machinery) library
5. A Sub-Contractors library

Function keys to use:

F10 To save into any library from the items or any resource screen **OR** use the *save to library* icon on your toolbar.

F9 To retrieve or lookup from any library from the items screen or any resource screen **OR** use the *retrieve to library* icon on your toolbar. Note that you will always be taken into the library for whichever screen you are currently in, for example:

F9 from the Materials screen will automatically look up the Materials library;

F9 from the Items screen will automatically look up built-up Items in the Items Library;

Etc. To amend and update the libraries use Admin and choose the appropriate library

See detailed descriptions below

THE ITEMS LIBRARY

Your cursor must be on the Items section of the screen to access the Items library. If your cursor is on a resource screen pressing F9 or F10 will access the resource library of the resource type that is active.

To save a built-up item to the items library press F10

To select a built-up item from the items library press F9

SAVING BUILT UP ITEMS TO THE ITEMS LIBRARY:

1. Whilst on the Items screen and on the item that you wish to store to the library:
2. Press F10 (or select Menu>Library>Save to Library)
3. A dialogue box appears with the details of the description, the Rate, The Original Job and The date.
4. You now select a category using the drop down box and selecting the First letter (then the second letter and so on until the desired category is located) of the required category - or
5. You scroll down through the available categories: or
6. You add a new category
7. Press the Save to Library button

SELECT ITEMS FROM THE ITEMS LIBRARY

To select a previously stored Item from the Items Library into your Job

(NB. You can set up the screen so that you can see the columns in any width or any order - please see Custom Views).

1. Whilst on the Items screen: Press F9 (or Menu Library>Select from Library)
2. Use the filter(s) - single or a combination - at the bottom of the screen to find the item you are looking for as follows:

- a. **The category:**

Type the first letter e.g. B (for Brick Paving). If you are then faced with too many categories starting with B, type the 2nd letter to narrow down the search and so on.

Select the category required and the items in that category only will show.

- b. **The Original Job**

You can also search by "The original job". The original Job information is automatically stored to the library when you store the Item

- c. **Code**

If you have given the Item a code you can use this to search.

- d. **Description**

You can also search by description by typing a key word that may be contained in the description of the required item. The keyword can be anywhere in the Item description and need not necessarily be at the beginning of the description.

Filters can be saved and used again for further selections.

3. Multiple selections can be made
4. Once you have a selection you may use the double or triple height feature to see more of the text for that item
5. Once you have decided which item you wish to use press Retrieve into Job Button.
6. You will be shown the original quantity and be prompted for the new quantity
7. Press OK
8. The new item may now be amended with a more appropriate description and individual resource quantities edited.
9. If the resource exists in the Resource Library the resources will be updated with the current value of the resource.
10. The labour rate will reflect the current default labour rate.

Labour library resources will be shown as the current rate as contained in the current labour resource library for that labour code. If a resource has been used to build the item that was previously found in the resource library, and is no longer present in the resource library, you will get a message concerning the

status of this item or items. You can copy this to the clipboard and paste this information to Notepad /WordPad /Your word processor etc.

ITEMS LIBRARY CATEGORIES

1. Create categories to save your library items to using the Menu >Admin>Item Library.
2. Once in the Item library you may create additional categories using Menu>Record>Show Categories(F7)
3. From here you may Add, Delete or Edit Category names.
4. You can also create a category at the time of saving the built-up item to the item library by typing in the category name in the blank field on the drop down box.

MAINTAINING THE ITEMS LIBRARY

You can access the Items Library for maintenance and this can be done as a separate function to a costing exercise (i.e. an administrator can be updating libraries whilst estimators work on quotes).This is done through >Menu>Admin> Items Library

You have access to, and can amend, the description, category,, original job, code and unit – you cannot alter resource details.

To view the resource details use **F6**.

If you want to alter the resource details of an Item Library record:

1. Retrieve the item into a Job
2. Amend the details
3. Re-save the Item to the Item library

Delete the original from the Item Library (Ctrl+DELETE) whilst in the Item Library Maintenance form which you will access again via ADMIN>ITEM LIBRARY and then perform a category search

THE RESOURCE LIBRARY

OVERVIEW

ACCESS

- a. F9 F10 and Menu>Library>Select from Library or Save to Library will access the Resource Library if you are a resource screen.
- b. If you are on the Items screen these keys and menu commands will act on the Items Library
- c. Updating the resource library has the option of updating your current Job. You must run **Connect** to complete the process. LiberRATE has been designed in this way because we assume that when you change resource details in the library, these resources may have been used in Jobs that have already been submitted and where updating is not permitted.
- d. Updating is therefore only performed when the **Connect** function is performed
- e. Menu>Library>Connect

Overview

The resource library consists of four separate libraries namely

- ✓ Materials
- ✓ Labour
- ✓ Plant
- ✓ Sub-Contractor

3 WAYS TO ACCESS THE RESOURCE LIBRARY FOR EACH RESOURCE

1. To select resources F9 From a resource screen

- | | | |
|-----------------------------|-----|-----------------------------------|
| 2. To save resources | F10 | From a resource screen |
| 3. To maintain the library. | Add | Delete or change resource details |

GENERAL NOTES

1. Unlike many other estimating systems, resources do not have to exist in the library for you to use them in your build-up. You have the option of typing the resource directly into your build-up and saving the resource to the library from there.
2. Except for labour resources, you can also type resources into your build-up without saving them to the library at all. Labour Resources must either come from the default labour rate on the Job screen or from the labour library if you do not wish to use the default labour rate
3. You must be on a resource screen to save and retrieve resources from and to any Item in your Job
4. F9 Accesses a resource library to retrieve information
5. F10 Accesses a resource library to save information
6. You can also access the resource libraries through the Menu >Admin>Resource Library. This mode of access is for inputting information which is not emanating directly from the Job at build up stage.
7. Resources which exist in a resource library will optionally update the Item. This means that if for example you created a bid and then some time later received information about a price being updated by one of your suppliers. Obviously you would wish to have the current price in your library.
8. Any Jobs resource values will only be updated if you run the Connect function to update the Job. This means that you can keep a submitted bid intact should you not have the option to submit updated prices since submitting the original bid.
9. You can adjust the values of a selection of resources in the library.

HOW TO USE THE RESOURCE LIBRARY

There are two library forms. They look almost exactly the same **but:**

- ❑ **The Admin Library form:** Allows you to input and edit each of the libraries only.
- ❑ **The Select and Save to Library Forms:** Allow you to select and save to the libraries from any of your resource screens and has buttons at the bottom of the form. This form is only accessed from one of the resource screens.

SAVING RESOURCES TO THE RESOURCE LIBRARY

You can save to the resource library as part of library administration
(Menu>Library>Admin>Resource Library)

You can also save to the resource library directly from your build-up.

1. Whilst on any resource screen
2. Create a new record F12
3. Type the description of the resource as you would like it to appear on your build-up, in the library and on your reports. e.g. Excavator 3 ton Hitachi
4. Press return and enter the Quantity, the Unit and the Rate
5. Double click the comment to enter a comment about the resource though this will not be saved to the resource library.
6. Press F10
7. A form will appear showing the details which have been taken from your resource form
8. Select a code if you wish

9. Select a category using the drop down box and typing the first few letters of the category you require or scroll down to the required category.
10. Add a new category if the required category does not yet exist
11. Select or add a Supplier as per the category selection above.
12. Press the Save to Library button.
13. The resource will now show a Y in the Lib field of your resource screen to indicate to you that it is connected to the library.

IMPORTING ELECTRONIC LIST INTO THE MATERIALS LIBRARY

A Materials list on an MS Excel spreadsheet can be imported into the Materials Library. From the upper menu select >Record>Import List to start the import wizard. The data in the spreadsheet must be held in strict column order (and with no header row) as specified below:

Column	Data
A	Description
B	Code
C	Unit
D	Rate
E	Pack size

You will be invited to specify the Category and Supplier for the data. If these are left blank the data will simply be added into the library even when similar data is already present. However if the wizard finds an exact match of Description, Code, Category and Supplier in the library then these matched records will be updated. Note that discount and waste percentages are not overwritten by the update.

All records have a date stamp indicating when they were created and last modified. Note that the creation date will be the date of upgrade from LiberRATE Edition 2 to Edition 3 and NOT the date of entry into the Edition 2 library.

From this dialog box you will be asked to select a supplier and a category.

Unlike saving from the Items screen you cannot create categories and suppliers here. These must be pre-created at from the Library Admin menu as follows

Supplier : Library admin> View > Suppliers

Category: Library admin> Record> Categories

If these items did not exist previously they will now appear on the drop down list.

Tip

Take some time to organise your descriptions on the spreadsheet

Example

If you have received a supplier list as such.

X4z16P 150 x 50

You may wish to amend this to something a bit more friendly such as

Timber prepared 150 x 25

You can use the code in the code column for searches and automatic updates of your materials lists

Notes on Electronic Import

LiberRATE will only find information in the front Excel tab

LiberRATE will only look in the columns shown above

LiberRATE will not recognise any characters in the numeric (quantity or price columns except numbers and decimal points

Notes

In order to prevent duplication, you cannot save the exact same resource to the library twice. You will get an error message warning that this is being attempted.

You can create an identical resource and save it to the library once the resource has been disconnected first. The library will tell you that a resource of that name already exists and give you options to connect to the original resource or save as a new resource. You can choose to Include Near Matches for the description of the resource.

Choose the appropriate option. You may wish to have the same resource in the library at different prices or with minor variations.

SELECTING RESOURCES FROM THE RESOURCE LIBRARY

There are a few ways to query the resource library and to find and select resources to build up an Item

Default Description search

1. Whilst on any resource screen
2. Create a new record F12
3. Type the first few letters of the resource e.g. Br (for bricks) and press F9
4. A list of all your resources starting with Br will appear
5. Select one or many of the resources from the list with your mouse or cursor keys and spacebar
6. Press the retrieve into Job Button
7. The resources will be brought into the active resource screen
8. Add a quantity for each resource

You can also search without first typing the first letters into the description field

1. Whilst on any resource screen
2. Create a new record F12
3. Press F9 to access the resource library
4. Search using the filters – combinations can be used - at the bottom left of the resource library screen.
5. To clear a Filter use the dropdown in “1 Filter” and select <All Records>> or simply delete the text previously input into the box for Description, Code, etc.

Description search

Type some characters of the resources description

Code search

Type a known code. This is for often used for resources where you find it useful to remember or place a code against each resource

Category search

The category box activates with a drop down arrow.

Scroll down or type the first letters (and second and third if necessary of the required category.

Select the required category.

Resources previously stored under the selected category only will be displayed.

Supplier search

As for category but select the supplier filter button

In all cases where a resource has been used from the library the letter Y will be displayed in the Lib field to show you that the resource is a library resource.

If you adjust the price of a resource in the library the price will update when you run connect.

THE LABOUR RESOURCE LIBRARY

The workings of the Labour resource library are slightly different from those of the other resource libraries

- ☐ The labour resource library allows you to use library labour rates rather than the default labour rate as set in on the Job screen.
- ☐ Every labour library record must have a code set in, in the library
- ☐ The code that is inserted in the record in the Code field will indicate to you which library resource you have used.

- ☐ Press F9 to retrieve Labour from the Labour resource library. If you have a description in the description box the your search will be based on the description
- ☐ If the description field is blank when you press F9 you will access the entire labour library.
- ☐ Select one or many of the labour resources from the library
- ☐ Add the description and quantities in the normal way
- ☐ Run Connect if you have made any changes to the resource library

See detailed notes in the Items Screen section for Labour:

MATERIALS RESOURCE LIBRARY

Whilst on a materials resource screen:

- ☐ press F9 to retrieve materials from the materials resource library
- ☐ press F10 to save materials from the materials resource library

See detailed notes: Items Screen – Materials

PLANT RESOURCE LIBRARY

Whilst on a Plant resource screen:

- ☐ press F9 to retrieve Plant from the Plant resource library
- ☐ press F10 to save Plant from the Plant resource library

See detailed notes: Items Screen - Plant

SUB-CONTRACTOR RESOURCE LIBRARY

Whilst on a Sub-Contractor resource screen:

- ☐ press F9 to retrieve Sub-Contractor from the Sub-Contractor resource library
- ☐ press F10 to save Sub-Contractor from the Sub-Contractor resource library

See detailed notes: Items Screen – Sub-Contractor

CONNECT AND DISCONNECT

(For ensuring that the resources of your Job match those in the Various resource libraries)

Menu>Library>Connect

When you retrieve or save resources to a resource library the resources used in your Job remain connected to your Job (indicated by the Y in the lib column of your resource screen)

Any change to the description or price details in the resource library will update all occurrences of that resource in your Job – **Only when you run the CONNECT Function**

OPENING A JOB FROM YOUR JOB LIST

LiberRATE assumes that Jobs in your job list may have already been submitted and that any changes you make to the resource library may not be admissible in already submitted Job.

If you want any resource library changes to take effect, Run connect to update the resources

In all cases you can run connect on the levels as shown in the menu

Connect	Current Job
	Current Item
	Current Resource
	All Materials, or Labour or Plant or Sub-Contractor

You can also disconnect a resource if you do not want it to update

RESOURCE LIBRARY MAINTENANCE

You can save into and retrieve from the libraries directly from your Job. Resources that have a “Y” in the Lib column cannot be edited except by administrating the Library. Changes only take effect when you run ‘Connect’

- ☐ Maintaining the Resource library is done via Admin on the Menu
 - ☐ From there choose the resource library that you wish to work on
 - ☐ From there you can perform the following functions
1. Set up a list of your most commonly used Resource Categories in each resource section. ADMIN>RESOURCE LIBRARY> *Choice of Library*>Resource. You can also create new resource categories when you save a resource to a library from a resource screen using the Icon or F9
 2. Once these are set up you can easily select a category for future storage of a resource.
 3. You do not have to have a category set against a resource but it is recommended as the category search helps you find a required resource quickly.
 4. Set up a list of your most commonly used Suppliers in each resource section.
 5. Once these are set up you can easily select a category for future storage of a resource.
 6. You do not have to have a supplier set against a resource but it is recommended as the supplier search helps you find a required resource quickly. There are also reports which collate materials by supplier and would allow you to send buying lists directly to a supplier. These reports depend on the resource having a supplier set against them in the library.
 7. If you are working from a list and wish to save resources to the library, Use Menu> Admin Resource Library>Materials, Labour, Plant and Sub-Contractor.
 8. Once you have chosen a library add resources as follows:
 9. INSERT a new record (INSERT KEY)

10. Add the description (we suggest **Brick Red** rather than **Red Bricks**). When searching at estimating time you will be able to do a search on all resources starting with Br and bring up a list of all of your bricks.
11. Tab or Enter to reach the other fields on this form.

Code

This is an optional field for finding a resource by code. Use this only for your most commonly used resources e.g. Cem1 = 25 kg bag of cement.

Unit

Any text description

Kg, m, bags

Rate

The supply rate per unit, If you wish you may add in a waste factor at this stage.

CATEGORY CREATION ON THE RESOURCE LIBRARY FORMS

You cannot add delete or edit Resource categories from the drop down box on the Library Admin screen.

You **can** create Resource categories when you are on a resource screen and you are saving a resource to the library directly from your build-up. the Save to Library Form

If you wish to add delete or edit categories:- Menu>Resource>Show Categories **(F7)** See [Resource categories](#)

EDITING AN EXISTING RESOURCE

If you amend details of an existing resource, these amended details can optionally be updated in all Jobs that use the resource. Multiple records can be amended by Enabling Multi-Select and choosing the required records. You must run connect to update a Job of you have changed resource details.

We strongly recommend that you run connect before submitting any Job unless you specifically do not wish to update the Job with new resource information.

You can also disconnect a resource in a Job

See Connect and Disconnect

MASS UPDATE RESOURCES BY %

You can increase or decrease a selection of resources in the resource library.

Example

ABC Supplies Ltd issues a 5% increase on all of its products.

1. Whilst in Menu> Library>Admin>(Resource type)
2. Using the search tools select the resources you wish to update (Search by Supplier ABC Supplies or Search by category (Timber)
3. You now have a selection on a form
4. Menu>Record> Adjust Rates and enter the percentage increase or decrease.
5. The selected resources will be adjusted.

Note: you can adjust rates on more than one record by selecting the Enable Multi-Select box and choosing the required records. All selected records will be adjusted accordingly.

SUPPLIER LIBRARY

- ❑ Create a list of suppliers though you may add suppliers to this list at the time of saving the resource from one of your resource screens
- ❑ Menu>Admin>Supplier Library:
- ❑ Use Insert to add new suppliers and tab or mouse click to add database information regarding the supplier.

This information will show on your reports especially the materials report which you can fax directly to your supplier if you have a fax modem.

You cannot add delete or edit Suppliers from the drop down box on the Library Admin screen. You can create Suppliers when you are on a resource screen and you are saving a resource to the library directly from your build-up - the Save to Library Form

If you wish to add delete or edit Suppliers:- Menu>Resource>Supplier Library

It is advised to have a supplier against a resource as you can use this as a search filter.

The supplier details also appear on some of the reports. Resources can be collated by supplier and this report can be faxed directly from LiberRATE to the supplier.

CREATING DEDICATED LIBRARIES

LiberRATE is supplied with sample databases and libraries that can be used and amended to suit your needs.

It is also possible to create new set(s) of libraries to hold Items, Resources and Suppliers dedicated to a particular purpose.

1. From either the Job or Item screen, select menu [Admin]> [Library Sections] (or use the Icons at top right of the menu bar) and the Library Administration screen will open.
2. The box that appears contains a list of libraries and indicates which one is currently "active". The default library is "Main" and if this is a new installation it will be the only choice.
3. To create a new library click [Add].
4. Enter the name of your new library and click [OK].
5. The new library has now been created but is not yet active.
6. To make a library active select from the list and click [Make Active].
7. The active library will now be indicated above the list of libraries – note that this shows the active library for administration purposes ONLY and not necessarily the active library that will be in use when you return to the Items screen.

IMPORTANT

If you have multiple libraries be aware that you MUST ensure that you have selected the appropriate "active" library when in the Items screen by menu [Library]> [Set Active Library]> then select the required library.

8. Select a resource library by clicking on the icons in the menu bar above – note that if this is a new library there will be no Items, Resources nor Suppliers listed. Alternatively you can return to the Job or Item screen by using the appropriate icon on the menu.
9. A newly created library will have neither Resources nor Categories. These must be added as described above using the [Library Administration](#) programme.

MARK-UPS PROFIT OVERHEAD AND DISCOUNT

JOB MARK-UP %

Definition:

1. Mark-up is the value added on as a percentage of the cost of each resource. The mark-up is shown as a percentage on the **Cost**.
2. The Cost + Mark-up is the selling price
3. If main contractors discount is to be allowed, the selling price is the Cost + Mark-up + Allowance for discount .
4. Note that the mark-up percentages shown on the Job screen are the Global mark-ups only. You have other options to mark up each individual resource type at Item level. These details are dealt with under the title Individual Mark ups

HOW TO MARK-UP YOUR JOB

Insert the Percentages by which you wish to mark up the Costs of the Current Job The resources will be marked up by the percentage shown on the job screen.

E.g. If the materials total for a given item is £100.00 and the Mark-up is 10% the selling price is

Materials $£100.00 \times 10\% = £10$ +(the Materials) $100.00 = £110.00$

Any Items with an ITEM Mark-up will be excluded from this percentage. See below

DEFAULT MARK-UPS

You can insert default mark-ups in the User preferences so that all new jobs start with the defaults

ITEM MARK-UP %

EXCLUDING INDIVIDUAL RESOURCES FROM THE GLOBAL MARK-UP

The Individual Resources of any Item may be marked up individually.

1. Allocating an Item Mark-up Excludes the marked up resources from the Job Mark up
2. On the Items Screen locate the Tab in the Bottom Half of the Screen which says Item Mark-up
3. Next to each Resource (Materials, Labour, Plant, Sub-Contractor) is a box. The following actions have effect:
4. JOB: Leaving the setting on this will mark the resource up by the Job mark-up as set in on the Job screen
5. ITEM: Setting the drop down box to ITEM will activate the box to the right. Insert the desired percentage to mark up the resource.
6. NONE: This will exclude the resource from any mark-up. This is useful for provisional sums
7. Items mark ups will be reported in the Mkup% box on the Job screen and shown as an average for that resource type
8. You can get a full analysis of the mark-up % for the whole job by printing the report titled
9. "Item Mark-up"
10. You may also use print to file to print this (and all reports) to a spreadsheet or word processor document.
11. Totals displayed in a print to file report are not calculated. If using in a spreadsheet please add in the formula for the columns and the total at the bottom of the report.

COST INFORMATION AND PROVISIONAL SUMS

The following information is displayed

1. **Cost** - The totals of all the resources for the current job at cost
2. **Mark-up %** -The percentage mark-up against each resource type. This is shown as an average and will reflect an average if any items are marked up individually at items level.
3. **Profit** - The profit value against each resource type. This includes the value if any items are marked up individually at items level.
4. **Sell** - The Cost + The Profit

Provisional Sums

Any resources in any items which are flagged for NO MARKUP at items level in the individual resource screens are shown as a collection in the Provisional sums box. Provisional sums are set using individual mark-up on the Items screen

Totals

Cost Total

The totals of the: Costs of the resources + Provisional sums

Sell Total

The total of the Marked up resources + Discount if applicable + Provisional sums

Items Total

This is a unique feature of the LiberRATE Estimating system to ensure the highest degree of accuracy in submitting bids and quotations

This box allows a comparison between the following items

The Materials, Labour, Plant and Sub-Contractor Resources + Profit (+ Provisional Sums) (+Discount if applicable)

and

The sum of the individual items on the items screen.

- ☐ The purpose of this comparison is to highlight any rounding differences.
- ☐ Rounding differences may occur especially with high quantities at very low rates where a fraction of the currency unit occurs.
- ☐ In these cases a rounding difference will be shown
- ☐ Rectify the difference by increasing the amount of decimal places shown on the Options menu (>File >Options>Money) until a minimal rounding difference is achieved.

PROVISIONAL SUMS

LiberRATE has a facility to flag items set as provisional sums so that they are not subjected to mark-up.

- ☐ A provisional sum is a sum set provisionally set aside for works that will be required but has not been fully defined as yet.
- ☐ Provisional sums are not usually subjected to mark-up or discount.
- ☐ As with Item Mark-ups, you may individually mark up a collection of resources within an Item at the bottom of each resource screen
- ☐ You have 3 options within each resource type for any Item
- ☐ At the bottom of each resource screen you will find 3 check boxes headed

"Mark-up for all resources in this Item"

1. Job:- This is the default and will subject these resources to the mark-up as set in on the Job screen.

2. None:- Selecting this option will subject **this set of resources to No mark-up** or discount .The value of these resources will be shown in the provisional sums box on the Job screen. There may be other Provisional sums in the Job. In this case the Provisional sums box will show a collection of these sums.
3. Item:- This allows you to set a value against this set of resources only and will exclude these resources from the Job Mark-up

If there are other resource types within this item you should set them if you do not wish them to be marked up by the Job mark-up.

For example if you place a None mark-up against materials but there are labour and plant resources in this item, they will still be subjected to the Job mark-up unless you set their mark-up status to none as well. Provisional sums are however usually placed against only once resource type.

OVERHEAD

Adds overhead as a % of resources cost

Resources in your job that are individually marked up are excluded from overhead. You should make any adjustments as necessary to cover these excluded items.

Example

If a value of 20 is placed in your labour mark-up box on the Job screen (i.e. you wish to mark up ALL the labour in your Job by 20 %) the formula is as follows:

Labour total x 1.10 = Selling Price of Labour

If in addition to this you have an overhead on the Job of 10 %, then the costs of the labour will be marked up x 10% and added to the % mark-up on the labour as follows:

Labour cost total x 1.10

+

Labour cost total x 1.05 = Selling Price of Labour

Important: Items with Item mark-up (as opposed to Job Mark-up)

If a resource or set of resources has an **Item** Mark-up on it then this item will be EXCLUDED from any overhead mark-up. You will have to adjust the item mark-up to compensate for this.

So if the Item mark up is 20% and the Overhead is 10%, the Labour on this item will only be marked up by the Item mark up of 10%.

Provisional sums and Overhead

As above any item set with an Item mark-up of "None" will be excluded from the Overhead % as set in in the Overhead box

All labour resources in the job EXCEPT those flagged individually for item mark up or provisional sums will be subjected to the following:

Selling Price = Labour Resource Totals + $\frac{20}{100} \times \text{Resource Totals}$

or

Resource Totals x 1.30

Discount

This is main contractors discount (MCD) and allows the addition of a discount for deduction at a later stage.

This is a figure to be allowed on the value of the Job which will be deducted at a later stage usually where the party submitting the bid is a subcontractor to a main contractor

Discount is calculated as follows:

$$\frac{(M+L+P+S)+\text{Profit}}{(1-\text{discount}\%)}$$

e.g. The Job value with profit is £10000.00
The Discount allowance is 2.5%

$$\frac{10000.00}{1-(2.5/100)} = 10256.41 \text{ so that}$$

$$10256.41 - 2.5\% = 10000.00$$

We recommend that discount only be added at submission of the Job as any figure in the discount box may distort your analysis of Mark-up percentages and Profit values.

VAT

You can display your Bill of Quantities report with VAT. To activate the VAT function use the **2 Job Options** button on the job screen. The Vat rate may be varied under the program options button from the toolbar.

FIND AND REPLACE

If you have used a particular resource through your estimate and wish to replace that resource with another resource you can use the Find and Replace Resource function.

Example

You have quoted using Brick Type A at £800.00 /1000 but the job is over budget.
You have been instructed to replace the Brick at 800/1000 with a brick at £500.00/1000

The find and replace resource will replace all instances of a particular Library resource with another chosen library resource.

Find Resource and Replace resource are accessed from Edit whilst on the Job screen

REPORTS (SEE ALSO PRINT TO FILE)

OVERVIEW

- ✓ Reports are generated from the reports button on the Menu
- ✓ There are a number of pre-set reports which will be fully explained later in this section
- ✓ You can generate the reports directly from LiberRATE or you can export reports to your spreadsheet or word processor.
- ✓ All reports are set for A4 paper in the UK
- ✓ You may fax your reports to a recipient if you have fax software installed or generate reports to PDF

HOW TO GENERATE REPORTS TO YOUR PRINTER

1. Reports may only be generated from the active Job
2. Select Reports from the Menu on either the Job or Items screen
3. Select the report you require
4. Select the options you require by placing a tick in the appropriate box.
5. The report will appear for viewing on your screen
6. Use the icons at the top of the reports screen to enlarge or reduce the screen view of each report.
7. Use the arrows to view each successive page or first and last pages of the report
8. Press the Printer Icon on the top left
9. The printer dialogue box will appear
10. If required change or set up your printer
11. If required select the pages that you wish to print.
12. If required select your fax printer driver if you wish to fax a report directly to a fax recipient
13. Select OK

Note

Any last minute changes or additions you have made in your Job may not appear in your latest report until that change is saved by either pressing the green tick on the taskbar or switching to another screen.

LiberRATE saves your last entry as follows:

1. When you create a new record
2. When you flick to another screen
3. When you exit
4. When you press Ctrl+S

PRINTING REPORTS TO A FILE (PRINT TO FILE)

OVERVIEW

The recommended format is Excel

You can generate different reports and combine them together in Excel

You can export your report to a Spreadsheet, Word processor, or Text file

This enables you to edit the presentation of your document or work with the data.

Data edited in other programs is not saved back to LiberRATE.

The following steps will show you how to export your data. We assume that you have some knowledge of the software system you are exporting to.

This help will not guide you through working with the data in the new environment.

Important

When you print to file the totals of a report will not be calculated totals.

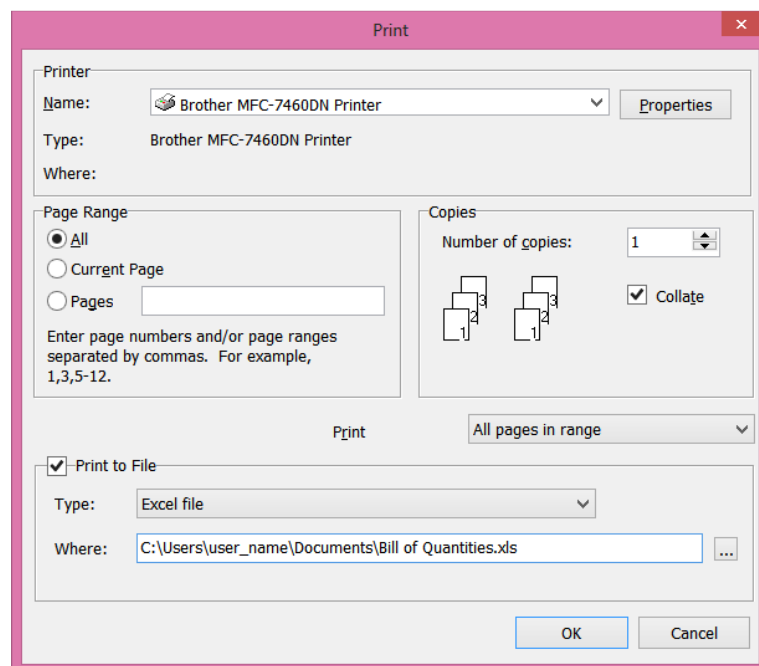
There are no formulae in a report sent to a file.

You should reset the formulae to verify the correct totals of columns and dependants.

Print to file is not a perfect report export. Some of the data will be transposed to other columns or rows in a spreadsheet.

You will have to move some of the data around to get a perfect report in this format. You will also have to set column widths and text wraps in Excel

(It's still easier than retyping a whole report into a spreadsheet.)



Follow steps above of the instructions above "How to generate Reports to your printer"

To print to a File

Generate the report from the Reports menu

Once you see the report on screen click the printer icon on the top left

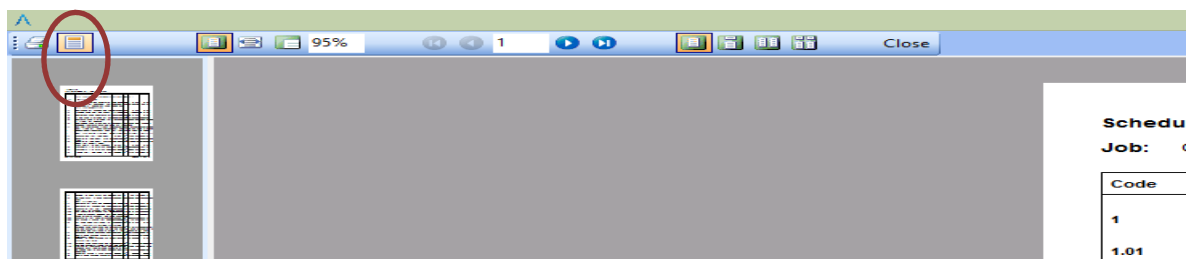
1. Tick the print to file box as shown below and select the type of file you require select the file type from the drop down box of the file that you wish to export to (Excel file or RTF PDF etc.)

2. Adjust the Where: box to set your location
3. Press OK
4. Choose the location using the browse box (with 3 dots) and rename the report if necessary
5. Each report will by default have the same name. You should rename your reports if you do not wish them to overwrite previously generated reports of the same name.
6. Select **Save** if you have changed the file name and you will revert back to the **Print to File** dialogue box
7. Press OK and the report will generate to the file name that you selected in the location that you selected or set up.
8. Open the file using your Word processor or spreadsheet or PDF application.

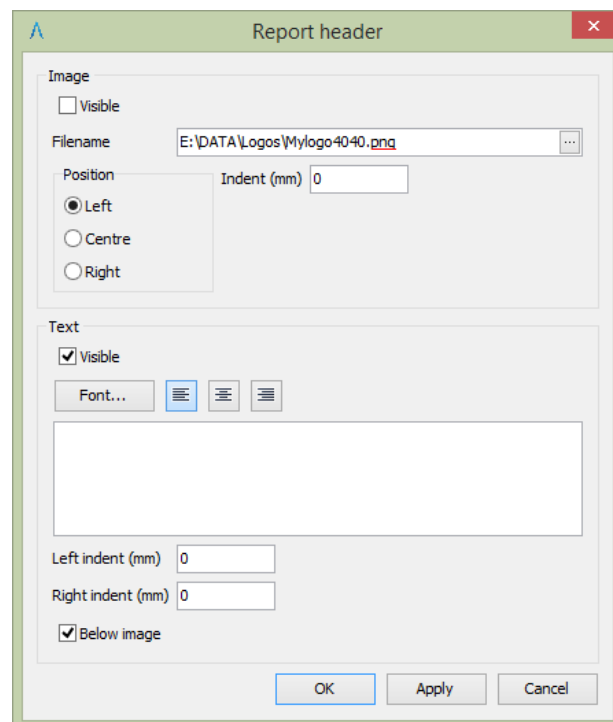
INSERTING A LOGO OR CUSTOM TEXT INTO THE REPORT

Generate the report to your screen

At the top left you will see a button to add the logo



You will see browse buttons and boxes to place your desired text



- Ensure that your logo is preformatted to fit into the available space.
- You cannot resize your logo from within LiberRATE
- Your logo should be the right size to fit in at the top of your report and should be **approximately 350 x 80 pixels**.
- You can use "Paint" which comes as part of Windows or any other graphics program to check the properties of your logo and to resize it to
Add in the desired information
 - Filename of the logo
 - The text you wish to insert
 - Tick the "Visible" buttons to toggle the logos on and off

SECURITY PASSWORDS ACCESS AND LEVELS

Notes

LiberRATE is issued universally with the Username and Password as Superuser /Demo

You cannot delete the Superuser account but we strongly recommend that if security is an issue that you change the Superuser password.

Tender security

If data security is an issue in your organisation you should consider using the security features in LiberRATE

There should be a minimum amount of people in any organisation who are set as Admin users

Only Administrators can add other users and change passwords

Administrators are all set at Job level 5.

If an Administrator sets a user with a level below 5 (or 4 or 3 etc.,) users with level restrictions will not be able to view jobs that are above their designated level.

If your staff have an opportunity to pass your information on to competitors, you should strongly consider managing your security as follows.

- Change your Superuser password from the Issued Demo
- Ensure that a record of this password is kept as we will not be able to assist you with lost passwords at the Superuser level if this is lost.
- Make sure all your new users are registered as level 4 or below
- You will then change the access level of tendered jobs to allow access to lower level users once the tender security is no longer an issue for any selected Job.

User Levels

Each Job can have a user level assigned to it.

Users can only access Jobs that are their password level or below.

Only the user with Level 5 password may access the users and password screen.

User levels are adjusted on the drop down on the Job screen.

You can set a Job to a lower user than yours but not a higher one.

If a Job is not visible to you ask a higher level user to set it to your user level for access.

PASSWORD

Once you have started LiberRATE you will see a password screen.

The user name is Superuser and the password is Demo. Enter these and press *Login*

If you have set up passwords you will need to enter your user name and password to enter the system.

Ensure that the cursor is flashing in the User field. Use your tab key (␣) to navigate

The password administration function is only available to level 5 users

If you have set up passwords you must use these User names and passwords in conjunction with each other

There are five password levels numbered 1 to 5

1. These are found under the menu item **Admin**, which can be accessed from the Job screen
2. A user does not have to have a password but must have a user name
3. The User field cannot be blank
4. 5 is the highest level
5. The level 5 users may add and allocate users and passwords
6. Your system is delivered with Superuser as the level 5 user with DEMO as the password (Not case sensitive)
7. You cannot delete Superuser although you may (and it is suggested that you do) change the password.

8. There may be multiple users on each level
9. Only level 5 users have access to the password administration box.
10. On setting up a new user the password administrator may allocate whether the new user has access to maintaining the libraries by placing a check mark in the **Lib Maintainer** check box

NAVIGATION

USING THE KEYBOARD

To go to...

The Items screen	>Alt+I
The Job Screen	>Alt+J
Materials	>Alt+M
Labour	> Alt+L
Plant	>Alt+P
SubContractor	>Alt+S

To navigate your cursor to the description box on the Items screen Alt+D

USING ICONS

There are a number of Icons at the top of your screen. Click the following icons to navigate in LiberRATE

To go to...

The Items screen	I
The Job Screen	J
Materials	M
Labour	L
Plant	P
SubContractor	S

The Tool bar and Icons

The tool bar contains Icons for the most commonly used tasks

You can remove or set the tool bar using Menu>View >Toolbar

Holding your mouse cursor over any icon will display a brief description of the Icons functions

More detailed description is shown simultaneously at the bottom of the screen on the status bar.

The following Icons are available

- ☐ **J I M L P S** Navigation to Items Job Materials, Labour, Plant and Sub-Contractor screens
- ☐ Insert a new record
- ☐ Append a new record
- ☐ Duplicate a record
- ☐ Save Changes
- ☐ Cancel changes
- ☐ Delete the current record
- ☐ Select from Library (Items if on the Items screen or resource from resources screens)
- ☐ Saves to the Library (Items if on the Items screen or resource from resources screens)
- ☐ Connect
- ☐ Disconnect
- ☐ View Marked up Totals
- ☐ Displays the Take-off pad whilst on a materials screen
- ☐ Activates the Resource library maintenance screen
- ☐ Activates the Items library maintenance screen
- ☐ Activates the Supplier library maintenance screen
- ☐ Displays the Options dialogue
- ☐ Exit

USING THE MENU BAR

The above commands are available by using the menu bar.

To select a menu item:

either Mouse click the menu item

Use ALT+ The underlined letter on the menu bar. e.g. ALT+F will activate the file menu.

Select the desired function.

From the File Menu Select Items Materials Labour Plant and SubContractor Screens.

HOTKEYS

❑ F2 All screens	Edit text
❑ F4 Items/Resource	Copy record
❑ F5 Items	Shows the Rates and Totals with mark-up
❑ F7 Resource screens	Brings up the Comment box from a resource screen
❑ F7 Library Categories	Shows the library categories whilst in library Admin
❑ F9 Items screen	Select from Items Library if on Items
❑ F9 Resource screens	Select from Resource Library if on Resources
❑ F12 Items/Resources	Adds a new record
❑ Insert Items/Resources	Inserts a new Record
❑ Ctrl+Del	Deletes the current record

MENU COMMANDS

The following commands and explanations of their functions are available through the Menu.

<u>F</u> ile		Keyboard Short Cut
Job	<i>Takes you to the Job Screen</i>	<i>Alt+J</i>
Items	Takes you to the Items screen	Alt+I
Materials	Takes you to the Material screen	Alt+M
Labour	Takes you to the Labour screen	Alt+L
Plant	Takes you to the Plant screen	Alt+P
Sub-contractor	Takes you to the Sub-contractor screen	Alt+S
Options	Allows you to set the following options:	
Money	Currency symbol and number of decimal places. The currency symbol is the default windows symbol as shown in the International folder under Windows Control Panel	
Number	Sets the decimal places for the quantity	
Labour	Sets the default labour rate for new Jobs Sets the number of hours per day to calculate the total mandays on the Job	
Colours	Allows optional use of colours for the various screens	
Reports	Sets the target printer from the printer list in your Windows printers folder. Sets the directory for reports that you prefer to export to your word processor or spreadsheet	
Exit	Exits the system	(Alt+X)

Edit	The edit menu offers text editing functions for text only in any field	
Cut	Cuts selected text for pasting elsewhere	Ctrl+X
Copy	Copies selected text	Ctrl+C
Paste	Paste cut or copied text to a desired text location	Ctrl+V
Select All	Selects editable text in a text field	Ctrl+A

View		
Toolbar	Allows the toolbar containing the icons to be viewed	
Status bar	Shows the status bar on the bottom of your screen	
Marked up Totals	Allows you to view your items with mark-up and discount reflected (Items screen only)	
Resource Totals	Will display or hide the resource titles at the top of your Items screen	
Pad	Brings up a pad against each materials record for calculating take offs measurements etc. The calculations are stored for future reference (Items screen only)	
Restore Default Layout	You may size the grids of all the screens or place columns in an order which best suits your style of thinking. Using this function will restore the layout to the system defaults	

Job	Only available on the Job Screen	Alt+J
Select /Change Job	Make another Job Active. The Job currently active is not included in the Job list	
Create New Empty Job	Creates a new Job	
Close	Closes the Active Job	
Delete/Reorder Job	Delete a Job or change the order of Jobs on the list shown using the arrows at the bottom of the screen	
Save Changes	Saves your last changes.	
Cancel Changes	Undoes your last change	
Import	Imports an archived or previously exported job or selection of Jobs from disk the network or your hard disk. This feature works only with LiberRATE .lji file types. Imported Jobs are appended to the existing list and do not overwrite Jobs of the same name.	
Export	Exports to an archive a Job or selection of Jobs to disk the network or your hard disk. This feature creates LiberRATE.lji file types	

Reports		
Selection of Reports	Select a report to print to printer or Print to file e.g. Excel Lotus 123	

Admin		
Resource Library	Access any of the Resource Libraries (Materials, Labour, Plant and Sub-Contractor) for adding deleting or changing details of the resources contained therein.	
Items Library	Access the Items Library (Built up Items) for adding deleting or changing details of the resources contained therein.	
Supplier library	Add or edit supplier names and address details which will appear on some of the reports	
Authorised Users	Admin screen accessible only to level 5 users to add new users and passwords	

Record	Available only from the Items Screen	Alt+R
First	Navigates to the first record of your Items	Ctrl+Home
Next	Navigates to the next record of your Items	Alt+N
Previous	Navigates to the previous record of your Items	Alt+P
Last	Navigates to the last record of your Items	Ctrl+End
Edit	Allows the editing of user input text and numbers	F2
Edit Comment	Edits the comment for that record	F7
Insert	Inserts a new record above the current record	Insert
Append	Adds a new record after the current record	F12
Duplicate	Copies the current record	F4
Save Changes	Saves changes	Ctrl+S
Cancel Changes	Cancels any changes you have made to the current record only.	Ctrl+Back-space
Delete	Deletes the current record.	Ctrl+Delete

Library		
Select from library	<p>If you are on the Items Screen- this selects the current Items from the Items Library into your Items screen</p> <p>If you are on a resource screen this selects resources from the appropriate resource library</p>	F9
Save to Library	<p>If you are on the Items Screen- this saves the current Item to the Items Library</p> <p>If you are on a resource screen this saves the current resource to the appropriate resource library</p>	F10
Connect	<p>Connects resources back to the library. All resources are auto-disconnected when a Job is no longer the active Job. i.e. when another Job replaces it as the active Job.</p> <p>Run connect before submitting any Job or where you have made changes in the library and wish these changes to be reflected.</p>	
Disconnect Current Resource	<p>Disconnects the current resource from the library to prevent updating to that resource only</p> <p>To disconnect a Job Close it and open it and do not run connect</p>	

OTHER FEATURES OF LIBERRATE

OPTIONS

Options are set in the options sub menu
Access the Options from Menu>File>Options

MONEY

Sets the amount of decimal places for your rates and totals. There are no residual values.
If you set to two decimal places all figures are rounded to two decimal places.
If you set to four decimal places all figures are rounded to four decimal places.
Use this feature to eliminate rounding differences that show up on the Job screen difference box.

Select whether you wish to display the currency symbol as set in your Windows control panel.
Select whether you wish to use a thousands separator.

NUMBERS

Sets the decimal places of the quantities fields

LABOUR RATE AS SET IN OPTIONS

Sets the default labour rate for all new jobs on the Job screen
Sets the default hours per day for all new Jobs on the Job screen

COLOURS

View the screens with colour coding or with white backgrounds

REPORTS

Select your default printer

WARNINGS AND PRECAUTIONS. GENERAL MAINTENANCE

PRICE UPDATING : CHANGES TO YOUR ESTIMATE

Please ensure you flick to the Job screen before outputting any reports after making any changes. This ensures that all changes are reflected in the latest reports

UNCONVENTIONAL EXITS

You should always exit your LiberRATE system using a normal shutdown. Exiting by closing down your machine whilst the program is still open could result in file corruption.
If an instance of this has occurred please contact us. We can examine files and in some cases repair them.

For safety you may also wish to export the list of current Jobs to a backup file. Reinstall the Jobs Database (See installation notes) This installation will overwrite your current Jobs database and you will lose all of your current information if you have not backed up.
Please call or email us if you are unsure.

GENERAL MAINTENANCE

It is recommended that you export your entire Jobs database regularly and then re-import the backup file into a clean database which can be downloaded from our website.

1. Simply run the program JOBSEMPY.EXE.

2. THIS WILL OVERWRITE YOUR JOBS DATA BASE. YOU MUST BACKUP YOUR DATA FIRST USING **EXPORT**.
3. Please phone for support if you are unsure.
4. You will have to use the standard passwords to enter the system. Please reset your passwords up again using Admin
5. **Remember this will overwrite all of your existing Job information.** If you have not backed up to a file your Jobs will be lost.
6. See the notes on [Export and Import](#).
7. Once you have completed an export your data will be safe.
8. Phone us to check if you are unsure before running this procedure

You should run this procedure after any unconventional exits even if your data appears to be in order

BACKUP YOUR DATA FILES – THIS IS IMPORTANT. DO IT REGULARLY

Backup your Jobs and Library regularly using WINZIP or an archiving program. Alternatively simply make a copy of the folders on another drive or a CD

The easiest way is simply to make a copy of the folders below and store them in a separate directory.

LiberRATE must be closed when you do this.

Personal Edition

Jobs Folder: C:\Users\user_name\AppData\Roaming\LiberRATE

Library Folder: C:\Users\user_name\AppData\Roaming\LiberRATE

Multi-user Edition

The default path for the data files is either:

\Server Name\User named directory\Jobs

\Server Name\ User named directory\Library

If you are not sure where the server files are stored, you can see this by starting LiberRATE and looking in Help/ About.

Press the blue i button and look down the list for these paths.

See also Import and Export

OTHER INFORMATION FOR USERS

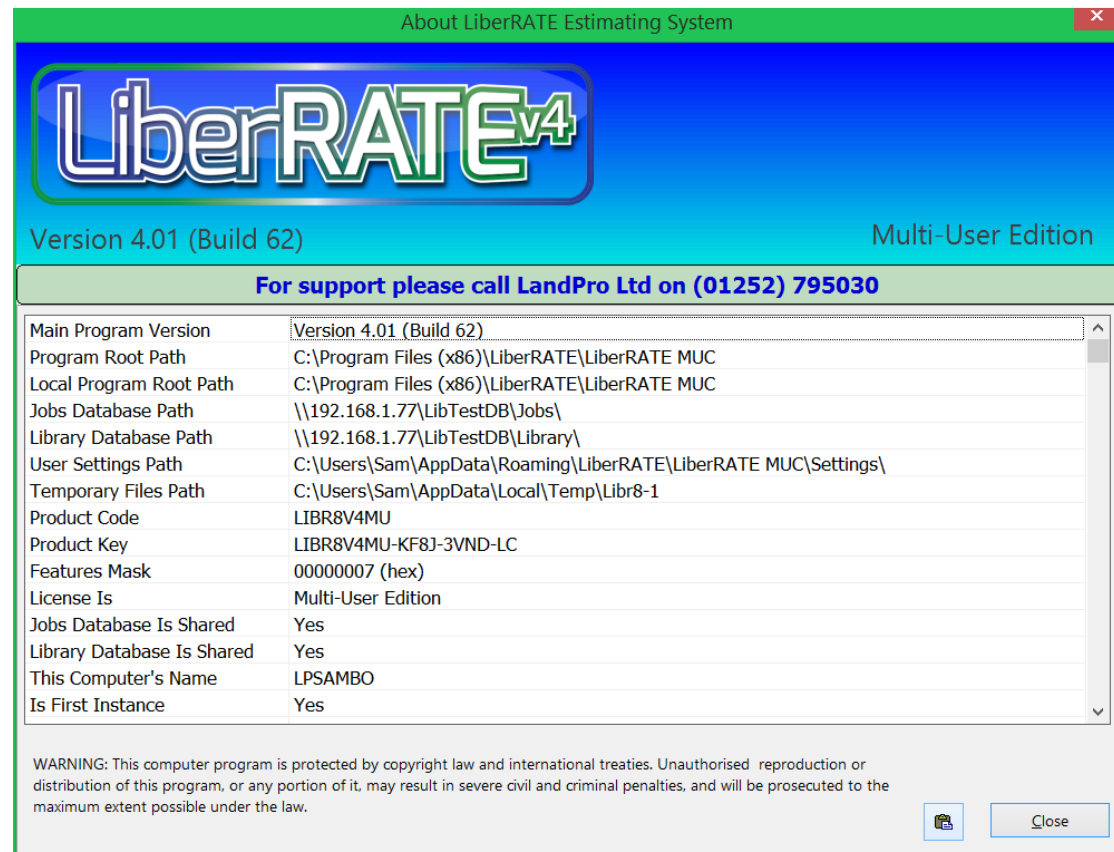
LICENCE KEYS

VERSION NUMBERS

DATABASE PATHS

You will find other information such as that listed above under the Help /About section
Then press the blue 'I' button

You can also use the Clipboard icon on this screen to copy and paste the information to a file



TUTORIAL

This tutorial will take you 1.5 hours. On completion you will be able to estimate with LiberRATE

Part 1 General Familiarisation

Start LiberRATE

1. The password screen will appear.
2. Type **Superuser** as the User name
3. Type **Demo** as the Password
4. Press Login. If you have converted from LiberRATE Edition 2 you may use your old passwords
5. You're now at the Job screen. There are two a few sample jobs an separate folders.
6. Select Sample 1 by clicking it once with your mouse
7. Press the **I** Icon on the Taskbar or press Alt + I on your keyboard
8. You are now at the Items screen
9. The screen is divided into 3 main sections. See the Items Screen section of this manual for more details
10. Select any item on the Items list on the top right hand section of the screen.
11. Press the Materials Tab on the bottom half of the screen to view the materials that make up the Item
12. Press the Labour Tab to view the labour resources that make up the item
13. Press the Plant Tab to view the Plant resources that makes up the item
14. Press the Sub -Contractor Tab to view the subcontract resources that make up the item **OR**
15. Press Alt+M, Alt+L, Alt+P, Alt+S to cycle through these screens again using the keyboard.
16. Click on the Items section again or Alt+I to return to the Items screen
17. Click on the J Icon or Alt+J to return to the Job screen

PART 1b Selecting another existing Job or creating a new Job

18. From the Job Screen (J) or Alt+J, Select Menu>Job > Select/Change Job or Create New Empty Job.
19. Give the new Job a name by typing the name in the description box
20. Call the new Job -Test Job 1.
21. Click on the Hours /Day box and ensure that the value here is satisfactory to you. This value influences the number of Mandays used for the whole Job. Enter 8 (hours per day)
22. Click on the Labour rate box and type the cost rate per hour with which you would like to work [10.50] (Note you can set this rate in >Menu >File>Options>and then select the labour tab. Each new Job will start with this Rate in the Labour Rate box
23. Click or TAB or mouse click in each box to fill in Job mark-up percentages on each of the resources.

Part 3 Adding Items to the Job

24. Press the I button on the toolbar or[Alt+I] to take you to the Items screen to begin building up your estimate.
25. On the Items screen and ensuring that you are anywhere on the top half of the screen (the items section) create a new record (F12) or use the toolbar

26. Your cursor will be flashing in the description box (the white text area on the top left of the items screen) waiting for you to title the Item. If your cursor is not in the description box, either click the box with your mouse or Type ALT+ D to navigate to the description box
27. Type a description " Supply and lay brick paving"
28. Tab to the Code box and Type a code. The code is simply any alphanumerical code, which you wish to use for reference on your reports or the code issued to you on the Bill, which you are pricing from. e.g. A,B,C or 1.1, 1.2, 1.3 etc
29. Press Return and the cursor jumps to the Quantity field. Enter a quantity [20]
30. Press Return and the cursor jumps to the Units field. Type a unit [m2]. Do not press Return after this operation, as this will create a new record. If you have pressed Return and created a new record, simply ensure that you re-select the item that you titled previously and wish to begin pricing

You have now created an Item. The next step is to begin selecting and adding the resources that make up the item.

Part 4 Adding resources to the Item






You are now going to add two materials. One material will be from your library, the other will be a new resource that you will save to your library.

Your cursor should still be in the unit's field (or anywhere on the Item you have just created: If the cursor has jumped to a new empty item, simply reselect the newly created item using your mouse or up/down cursor keys. This ensures that the resources you will now be adding are the "children" of the Item that is being priced.

31. Click the materials tab or Alt+M
32. Create a new record F12 (There is already a record there but you cannot type into it until you've pressed F12)
33. Type Bricks Istock Aldridge Paviers and press Return (↵)
34. In the quantity field type the quantity of bricks that you will need [1050] this includes 5% waste
35. Type the unit "each" (or /1000 if you prefer) ␣
36. Type the Rate .35␣(or 350 if you prefer. You must also change your quantity to 1.05 rather than 1050 if you are pricing bricks as a /1000 unit rather than each)
37. Now you will save this resource to the Materials resource library.
38. Press F10
39. On the dialogue Box Fill in the information required
40. Code (optional) this will enable you to find resources easily by code
41. Category (suggested) Open the drop down box and type the first few letters of the required category. Choose BRICKS PAVING If the required category is not found you can add a new category here.
42. Supplier (suggested) Selecting a supplier clarifies many of the reports and searches. If the required supplier is not found you can add a new category here.
43. Press the SAVE TO LIBRARY button
44. Now you will recall a previously stored item for the library
45. Create a new material record F12
46. Type "ty" (For Type 1) and press F9
47. A list of "type 1" prices appears
48. Select an appropriate price from the list

49. Press the Retrieve into Job button
50. Add a quantity (Use the pad if you wish to calculate the quantity. It will also store your calculation. The pad is the Icon with the Calculator on it and is available against each materials record.
51. You can also press f9 on a blank description and use the library search filters at the bottom of the library screen.
52. You will note that against both items there is a Y in the Lib column to indicate that this resource is connected to the library. Any changes to the library will update your Job once you run the Connect function from the Library menu

Now for the Labour

53. Select the labour tab or Alt+L
54. Type a labour description: Excavate paving area 
55. Add a Men quantity (e.g. 2 men for 8 hours) Type "2" under men 
56. Type "8" under Quantity 
57. Press F12 to create a new record
58. Type "Lay type 1": Men 2  Quantity 5 
59. You will have notice that the rate that you set in under Labour Rate on the Job screen comes in automatically on each new record.
60. Change the Rate on the Job screen and see what happens.
61. You can also access the Labour library from the Labour resource screen by pressing F9 and using other library labour rates.

PLANT

62. Click on the plant screen and exactly the same way. Add an excavator from the plant library. If you are not sure what to do:-
63. F12 For a new record
64. Exc +F9.
65. Select the appropriate resource from the library list that appears
66. Add the Quantity: 1 (the unit hour, day or week has been brought down as part of the rate from the library)

At this stage we will assume that your rate has been built up. Look at the top of your screen and view the individual resource totals in the summary boxes.. Is the total the same as the total on the Items grid?

If not Press Ctrl+S to save your last entry

Is it the same now?

If not increase the number of decimal places on the Money Tab in the File> Options menu.

NOW FOR THE CLEVER BIT (Part 1)

Now you will save this built up item to the Items library so that you can use again and again in future build-ups no matter what the size.

67. Ensure that you are on the Items section of the Items screen: (anywhere on the top half i.e. not on a resource screen)
68. Press F10 (save to the library)
69. On the dialogue box that appears you will note that some details are already filled in for you.
70. Select a category to save this brick paving item to. Open the drop down box at Category

71. Type Br to go the brick sections and select the Category called Brick Paving (You can also create New categories here if the category that you require does not exist)
72. Add to or amend the comments if you wish
73. Press the SAVE to LIBRARY Button

This next step will show you how to use the information you saved in a new item. The new item can be in the same Job or a different Job.

Tutorial: The Clever Bit - Part 2

Retrieving a Built-up Item from the Items Library.

In this section of the tutorial we will only examine bringing in a single item from the Items Library and Appending (adding on to the bottom) of your estimate

74. Ensure that you are on the Items screen
75. Press F9 to access the Items Library
76. On the bottom left of the library grid which now appears, click the "Category" option.
77. Open the drop down box and Type Br (for brick paving) or scroll down to the required category.
78. Select the required category by pressing your enter key or clicking it with your mouse.
79. You will also see a choice of view heights at the bottom right of the screen. Select double or triple height if you wish.
80. You can see more info about the items listed by scrolling the grid to the right. You can also re-order the columns by dragging the titles and set the widths of the individual columns. These settings will remain in place until you run the Restore default Layout from the view menu
81. Press the retrieve into Job button at the bottom right of your screen
82. At this point a box appears with the Quantity highlighted. This is the original quantity with which you built up the Item
83. Change the quantity to the required quantity of your new Item [50]
84. The Item with all of its resources will now be brought into the Job with all of its resources for the required quantity.
85. You may alter the quantities, add or delete resources at this point and if you wish, re-save the Item back to the library as a new Library Item
86. You may if you wish re-order the Items on your list using the Blue arrows on the bottom of the items list
87. You may give any of the resources individual Item mark ups. See the notes on this section
88. You may adjust the resource rates in the resource libraries. These changes will not take effect until you run the Connect function. (See the notes on this under the Resource library section)

In the next section of this tutorial you will learn some of the more advanced features of the LiberRATE Estimating system

Summary

You have seen how to:

- | | | |
|---|------|---------------------------------|
| ✓ Create an Item | >F12 | From the Items screen |
| ✓ Add resources to an Item | >F12 | from a resource screen |
| ✓ Save a resource to the resource library | >F10 | <i>from any resource screen</i> |

- | | | |
|--|------|---------------------------------|
| ✓ Retrieve a resource from the library | >F9 | <i>from any resource screen</i> |
| ✓ Save an Item to the Items library | >F10 | <i>from the Items screen</i> |
| ✓ Retrieve an Item to the library | >F9 | <i>from the Items screen</i> |

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