

LIBERRATE ESTIMATING EDITION 4

TUTORIAL 1

The Main Rule about LiberRATE is

It thinks Like You do!

Think through your Job add the Task that you need to carry out to do the entire Job. LiberRATE is going to help you to be accurate efficient well presented and effective in your Bid

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

Notation

The following terminology is used in the LiberRATE tutorials

A **Field**: A single box for inserting or displaying information on a record e.g. Description or Quantity or Unit, etc.

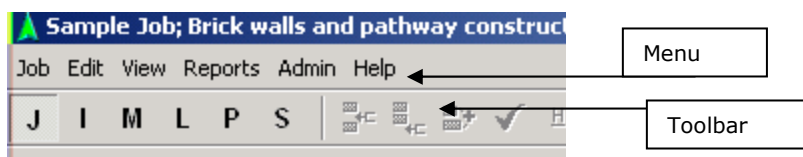
A **Record**: A row of information consisting of a number of fields

The following symbols are used in this tutorial.

The Menu

[Job] [Edit] [View] [Reports] [Admin] [Help]

The Toolbar



[Job]

This means select from the Menu item entitled **JOB**

[Job]> [Open Job]

This means: Select from the job menu and then select [Open Job]

The next step is to select the option shown

e.g. [Job]>[Close Job] then [Job]>[Open Job]
simply means

Go to the Menu

Select : Job

Select: Close Job

then

Go to the Job menu

Select: Job

Select: Open Job

Part 1 : General Familiarisation

The following keys are the most often used. Write them on a post it note and stick it on your screen surround. You'll soon be familiar with them.

F12	New Record (line)
F9	Search Library
F10	Save to Library
Ctrl + Delete	Delete Record
Insert	Insert a record above

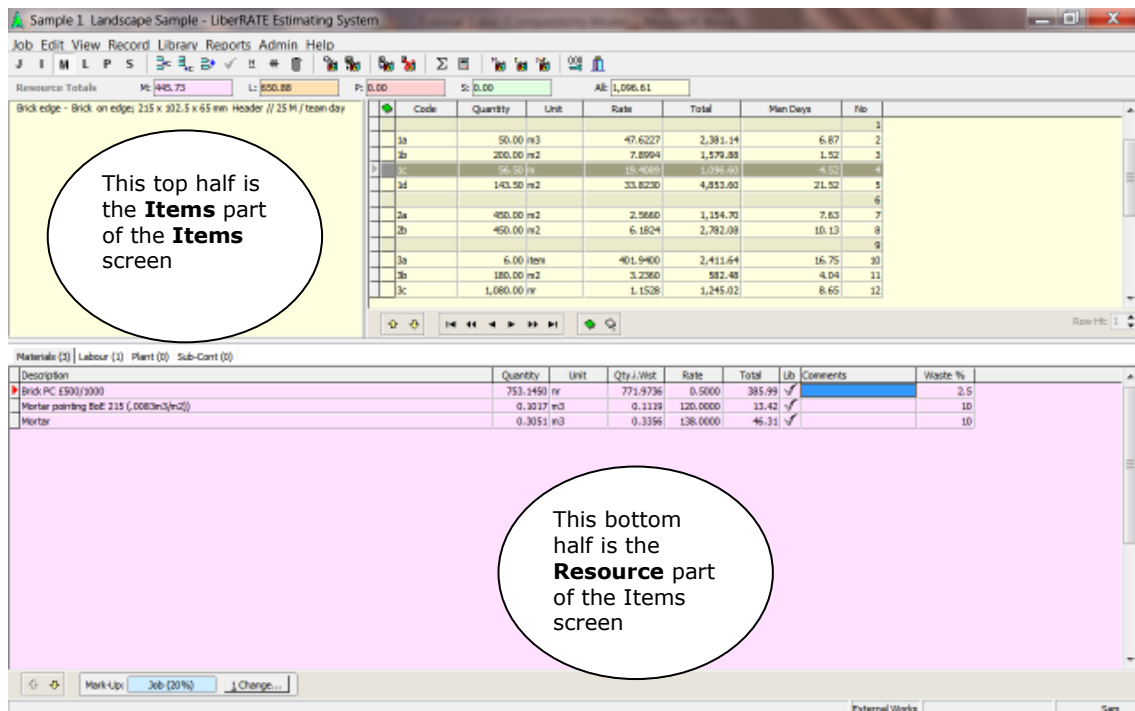
To start double click the green LiberRATE icon on your desk top or [Start]>[Programs]>[LiberRATE] then click on the green LiberRATE icon.

1. The password screen will appear. Type **superuser** as the User name and **demo** as the Password (NB. if you have converted from LiberRATE Edition 2 you may use your old passwords).
2. Click **OK**
3. You are now at the **Job Screen**. There are a sample jobs provided for the trial and the first will be open now.

	Cost	Profit on Res. with Job MkUp	Profit on Res. with Items MkUp	Sell
Materials	9,717.99	1,943.60	0.00	11,661.59
Labour	12,939.25	3,234.81	0.00	16,174.06
Plant	1,615.66	403.92	0.00	2,019.58
Sub-Cont	0.00	0.00	0.00	0.00
All Resources	24,272.90	5,582.33	0.00	29,855.23
Provisional Sums	0.00			0.00
Cost Total	24,272.90			
Sell Total				29,855.23
Items Total				29,855.22
Difference				0.01
Grand Total				29,855.23
Total Man-Days				89.86

4. Press the **I** icon on the Taskbar or Alt+I on your keyboard
5. You are now at the **Items Screen**.
6. This screen is divided into 3 main sections:
 - 6.1. The Item Description panel (top left)
 - 6.2. The Item List panel (top right)
 - 6.3. The Item Resources panel (bottom)

- see the Items Screen section in the manual for more details.



7. Select any item on the Items list (the grid) on the top right hand panel of the screen – notice that the description in the box to the left changes for each item. Notice also that the Resource Totals above do likewise.
8. Return to the first Item and press the Materials Tab on the bottom half of the screen to view the materials that make up this Item.
9. Press the Labour Tab to view the labour resources that make up the item.
10. Press the Plant Tab to view the Plant resources that makes up the item.
11. Press the Sub-Contractor Tab to view the subcontract resources that make up the item
12. Click on the Items icon again to return to the Items screen
13. Click on the J Icon or to return to the Job screen

Part 1.1 : Opening an existing Job and creating a new Job

14. From the Job Screen (J) use the top menu and [Job]>[Open Job]. This will open your Job Folders or directories - select the “External Works Sample” directory then “Sample 2 – External Works” by clicking it once so that turns dark blue. Then click [OK] - you have now re-opened the job we were previously looking at. You could, of course, open a different job by looking in the other directories.
15. To create a new job use the top menu and [Job]>[Create New Empty Job].
16. The “New Job wizard” has three stages:
 - 16.1. The first screen will ask if you wish to create a Normal job or a Master job. Select [Normal Job] and click [Next].
 - 16.2. The second asks you to give the new Job a name by typing the name in the description box - call the new Job “Test Job 1”.


- 16.3. The last allows you to choose the folder in which the new job will be created. Note that you can create a job in any folder in “My Jobs (SuperUser)” but not in “Others’ Jobs”. See the **Security** section of the manual for more details.

- Click [Finish] to create your new job.

17. The new job screen will appear. Note there are zero values or blanks in all boxes except Job Description, Level, Hours/Day and Labour Rate.
18. To make changes to the Job Description and Details section click [1 Change]. You can now amend the Description (this will change the name under which the job will be saved), the Start and End dates and add Comments. The Level can also be set – this determines the security level required to work on this job – see the Security section of the manual for more details.
19. Click [OK].
20. To make changes to the Job Settings click [3 Change] and click on the Labour Hours/Day box and ensure that the value here is satisfactory to you. This value influences the number of man-days used for the whole Job. Enter 8 (hours per day).
21. Click on the Labour Rate(/Hr) box and enter the cost rate per hour with which you would like to work – change to £18.00. Each new Job will start with this rate in the Labour Rate(/Hr) box until you amend it again (Note you can also set this rate in [Job]> [Program Options]).
22. Click in or TAB to each box in the Mark-Up % area to fill in Job mark-up percentages for each of the resources – put in a reasonable value in for each one.
23. Click [OK] to return to the Job Screen.

A new empty Job has now been created you are now ready to start adding Items (Tasks that make up the Job)

Part 2 : Adding Items to the Job

1. Press  on the toolbar to take you to the Items screen to begin building up your estimate.
2. 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)
3. 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 to navigate to the description box
4. Type a description " Supply and lay brick paving".
5. 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. Press [Return] and the cursor jumps to the Quantity field. Enter a quantity, such as [20]
6. 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 3 : Adding Resources to the Item.

A Resource is an element of a task or a cost that you will pay to do an **Item** (task).

A resource is either:

- A material that you will buy.
- A Labour task that will be performed.
- A Plant (machinery) resource.
- A subcontractor.
- A provisional sum.

Notes

- Any item must have at least one resource in it
- Remember: There are 5 Libraries: The Items Library and the 4 Resource Libraries (Materials Labour, Plant and Sub-contractor).
- Resources do not have to exist in the Library for you to use them. They can be added in as you go.
- A Library resource has a “√” (Tick) in the Lib column.
- You can adjust only the quantity of a Library resource. All other details must be adjusted via Menu >Admin>Resource Library>Materials, Labour, Plant, Subcontractor.

Adding Materials

You are now going to add two materials. The first will be a new resource that does not exist yet in your library and that you will save to your library for future use. The second will be retrieved from 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.

1. Click the materials tab or **M**
2. Create a new record by pressing F12.
3. Type “Bricks Blockley” and press [Return]
4. In the quantity field type the quantity of bricks that you will need “1000”. Press [Return].
5. Type the unit "each" (or /1000 if you prefer)
6. Type the Rate “35” (or “350” if you’ve used /1000). Press [Return]
7. Add a “waste” % figure if required. By putting “5” in this box 5% will be added to the quantity – if left blank and no allowance for waste is made. Press [Return].
8. Add a comment if required then use the [left arrow] to move back to the Description.
9. Now you will save this resource to the Materials resource library.

10. Press [F10].
11. The Save to Materials Library dialogue box appears. Fill in the information required:
 - 11.1. Code (optional) this will enable you to find resources easily by code
 - 11.2. 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.
 - 11.3. Supplier (suggested) - selecting a supplier clarifies many of the reports and searches. If the required supplier is not found you can add a new supplier here.
12. Press the [Save to Library] button. Notice that there is now a “√” in the Lib column.
13. Now you will extract a previously stored item from the library.
14. Create a new material record [F12].
15. Type “ty” (For Type 1) and press [F9]. (As an alternative you can also press [F9] on a blank description and use the library search filters at the bottom of the library screen).
16. A list of "type 1" prices appears
17. Select an appropriate price from the list by clicking once
18. Press the [Retrieve into Job] button
19. To add a quantity Tab or Press [Return] to move to the Quantity box. (You can also use the take-off 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). Once the quantity is entered press [Return] and use the [Left Arrow] to return to the Description.
20. You will note that against both items there is a √ in the Lib column to indicate that these resource are both connected to the library. Any changes to the library will update your Job once you run the Connect function from the Library menu – see **Connect and Disconnect** in the manual.

Now for the Labour

21. Select the labour tab or L
22. Type a labour description: e.g. “Excavate paving area “. Press [Return]
23. Add a Men quantity (e.g. 2 men for 8 hours) e.g. type "2" under men. Press [Return]
24. Type "8" under Quantity. Press [Return]
25. Press F12 to create a new record. Than as above:
26. Type "Lay type 1"; then Men “2” and Quantity “5”. Press [Return].
27. 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.
28. Change the Rate on the Job screen and see what happens. See point 20 above for a reminder!
29. You can also access the Labour library from the Labour resource screen by pressing F9 and using other library labour rates.

Please note that you cannot save into the labour library from here. You must use menu [Admin]> [Resource Library]> [Labour]. This is addressed in Tutorial 2.

And the Plant....

30. 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:-

31. F12 For a new record
32. Exc +F9. (This searches the plant library for anything starting with “Exc”
33. Select the appropriate resource from the library list that appears
34. Add the Quantity: 1 (the unit hour, day or week has been brought down as part of the rate from the library)

Exactly the same process would apply for adding a Sub-Contractor resource.

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?

Part 4: Saving a built-up Item to the Items library.

Now for the clever bit!

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 quantity of your Item is.

1. Ensure that you are on the Items section of the Items screen: (anywhere on the top half and not on a resource screen)
2. Press F10 (save to the library)
3. On the dialogue box that appears you will note that some details are already filled in for you.
 - 3.1. Ignore the Code for now
 - 3.2. Select a Category to save this brick paving item to. Open the drop down box at Category and type "Br" to go the brick sections. Select the Category called "Brick Paving" (You can also create New categories here if the category that you require does not exist)
 - 3.3. Add to or amend the comments if you wish.
4. Press the [OK] button to save to library.

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.

Part 5 : 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. You have other options which will be addressed later.

1. Ensure that you are on the Items screen
2. Press [F9] to access the Items Library
3. In the centre at the bottom of the library grid, click the "Category" option.
4. Open the drop down box and Type "Br" (for brick paving) or scroll down to the required category.
5. Select the required category by pressing your enter key or clicking it with your mouse. Note that the Items show you from which job they were saved – this helps locate the most appropriate for your current (similar?) job.
6. You are able to change the view of this library by using the [View] button at bottom right. Select double or triple row height for clarity if you wish . 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.
7. Press the [Proceed] button at the bottom right of your screen
8. At this point a box appears which allows you to select whether this Item is appended after all existing items, inserted after current item or merged with the current item. For this exercise select [Append.....]. Click [Next].
9. The next box indicates the original quantity with which you built up the Item.
10. Change this original quantity to the required quantity of your new Item. Type "50" into this box. Click [Finish].

11. The Item will now be brought into the Job with all of its resources adjusted for the required quantity.
12. 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
13. You may also, if you wish, re-order the Items on your list using the yellow arrows on the bottom left of the items list

Part 6 : Reports

1. To create one of the range of reports available from your Job on LiberRATE use menu [Reports]> and select as appropriate. Spend a few minutes reviewing the full range of reports for this job – you can do this on screen only and it is not necessary to print all of them out!
2. For many reports you are given options as to how the information is to be presented. For example choose to omit prices from a Bill of Quantities to send out to get a quote or from an Item Details report to give task-only instructions to your team supervisor.
3. Note that these reports can be printed as seen, sent directly to a fax machine or output to Excel. See the section on Reports in the manual.

Summary

You have seen how to:

- | | | |
|---|------|---------------------------------|
| ✓ Create an Item | >F12 | |
| ✓ Add resources to an Item | >F12 | |
| ✓ 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> |
| ✓ Create reports | | |

In Tutorial 2

You will learn how to

- ✓ Retrieve multiple Items into your Job
- ✓ Merge Library Items
- ✓ Give Resources individual Item mark ups and Provisional Sums.
- ✓ Create Header Items.
- ✓ Show Excluded Items
- ✓ Use the Frequency Options
- ✓ Create Master Jobs