

WinEst

Introduction to Estimating Training



Who Should Take This Course

This course provides an understanding of WinEst features. It is designed for clients, Trimble partners, employees, and college professors, who need to understand:

- The benefits of using WinEst Estimating Software
- Customization capabilities

Prerequisites for the Introduction to Estimating Course

- Basic computer skills

What You Will Learn

This course will provide you with a solid understanding of WinEst value, how to navigate within it, how to customize it to meet your company needs and how it's used to increase efficiency and reporting in creating an estimate.

Objectives

After completing this course, participants will be able to:

- ✓ Navigate WinEst with Confidence
- ✓ Use Main Features of WinEst
- ✓ Put WinEst Knowledge Into Action

Topic Descriptions

WinEst Introduction to Estimating

Key Features Overview

Trainees will receive an introduction to each WinEst feature and understand important software components including creating an estimate, customization, reporting, estimate and database editing as well as building assemblies.

Access and Navigation

Trainees will get the opportunity to navigate within the software and learn how to search Help.

Exploring Key Features

Key features will be explored with hands on exercises. Features include:

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|-------------------------|----------------------------------|---------------------|
| ▪ Building an estimate | ▪ Work Breakdown Structure (WBS) | ▪ Editing Databases |
| ▪ Modifying an estimate | ▪ Customization & Formatting | ▪ Assemblies |
| ▪ Item and File History | ▪ Markups, Bonds and Taxes | ▪ Conditional Items |

Configuration Capabilities

Trainees will get the opportunity to set personal preferences, edit and understand estimate level security, create custom filters and print page styles, and create and modify assemblies.

Typical Agenda

This class is a combination of lecture, demonstration, hands-on practice, and discussion of how concepts and features learned will apply in the business workplace. Each class day includes breaks and lunch, resulting in a daily in-class time of approximately 7 hours.

Day One <i>8:30am – 4:30pm</i>	Introduction ○ WinEst Overview ○ Access and Navigation ○ Help Building an Estimate ○ Estimate Information ○ Database Structure ○ Adding and Quantifying Items Customization ○ Editing Preferences ○ Customizing Toolbar & Status Bar ○ Adding Estimate Users ○ Setting Estimate Security Editing and Adding Additional Items ○ Adding Notes & Memos ○ Changes to Takeoff ○ Assembly Takeoff ○ Unique Items Analyzing Estimate and Work Breakdown ○ Item History ○ Custom Filters & Formatting ○ Define Work Breakdown (WBS) ○ WBS Reporting
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Day Two <i>8:30am – 4:30pm</i>	Alternates and Markups ○ Options & Add-ons ○ Alternate Reporting ○ Adding Net & Gross Markups ○ Adding Bonds ○ Adding Taxes Reporting ○ Built-in Reporting ○ Printing Filter View ○ Custom Reports ○ Printing to PDF Database Editing ○ Item Database ○ Database Headings ○ Markups & Bonds Database Assemblies ○ Creating ○ Editing ○ Functions & Procedures ○ Assembly from Estimate Additional Features ○ Conditional Items ○ Bid Lists ○ Cost Buildup
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