



Release Notes

Version 7.3

Our Release Notes provide you with information about new features, benefits and improvements in new versions of Benchmark Estimating Software.

These Release Notes cover the original Version 7 release of Benchmark Estimating Software – Version 7.2, as well as the latest upgrade to Version 7.3.

June 2011

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Release Notes Summary

Version 7.2 Summary (original V7 release)

Main New Features and Improvements	Lite	Professional	Corporate
IMPROVED Interface design makes the software easier to use	X	X	X
NEW Powerful database engine	X	X	X
IMPROVED Performance, up to 74% faster than Version 6 in many data processing functions~	X	X	X
NEW Forecast Quantities feature helps you prepare more accurate estimates for longer term maintenance projects		X	X
IMPROVED Find features throughout the program save you time in many routine tasks	X	X	X
IMPROVED Report compatibility – all reports can now be saved directly into Microsoft® Word and Excel without loss of formatting	X	X	X
IMPROVED Library Imports/Exports now work from Microsoft® Excel rather than a Text file so it is easier to import data	X	X	X
NEW Multi-window functionality allows you to have multiple windows open at the same time, making you more productive	X	X	X
NEW Command Centre makes your estimating more organised	X	X	X
IMPROVED Administration window has been re-designed making it easier for you to maintain administration settings	X	X	X

Main New Features and Improvements	Lite	Professional	Corporate
NEW Project Summary report provides you with a more transparent breakdown of your estimated costs	X	X	X
NEW Duplicate Project window saves time duplicating Projects and makes the many duplicating options clearer to the user	X	X	X
NEW Default table formats for your Microsoft Word templates, gives you more unique and professional Quotes and saves time		X	X
NEW Ability to not apply Profit to an individual Resource , gives you greater flexibility when applying Profit	X	X	X
NEW Regionalisation feature allows the segmentation of your database by user-defined Regions. This streamlines estimating, integration and business reporting for organisations that operate across a wide geographical area where pricing varies			X
NEW Access permissions per user gives you more control over which users can see which Projects, ideal for larger organisations with many users in the one database			X

Version 7.3 Summary (latest upgrade)

New Features and Improvements	Lite	Professional	Corporate
NEW Add Items from Project feature, allows you to copy Items easier and faster between Projects	X	X	X
NEW Auto Allocate from Project feature, allows you to use Items in another Project when running Auto Allocate		X	X
NEW Allocate Resources from Project Item feature, gives you the ability to copy Resources between Items in different Projects	X	X	X

NEW Advanced Spread calculation method, helps you prepare more transparent and precise submission rates for Items based on each Item's Resources, for more competitive tenders and maximum profits		X	X
NEW Percentage increase function in Spread , allows you to apply a percentage increase to all Submission Rates in a Project in one operation	X	X	X
NEW Section level Word Quotes allow you to produce a Quote for an individual Section, great for Variation Approvals		X	X
IMPROVED Insert Mode status (i.e. on/off) is now saved per Estimator per screen	X	X	X
IMPROVED grid in various main screens allows you to see more records (e.g. more Items, more Resources) on your screen – this means you don't need to scroll as much, saving you time	X	X	X



Version 7.2 Release

Leading edge technology to take your
business into the future | Improved
performance by up to 74%~ | Stylish new
design | A better end-user experience |
Happier and more productive staff | Greater
functionality

Overview of Version 7

Many great benefits

Built on the latest software development platform from Microsoft – the Microsoft .NET® Framework – Benchmark Estimating Software Version 7 offers you many benefits including:

- *Performance improvements of up to 74%~ compared to Version 6*
- *Greater productivity of personnel*
- *Faster production of estimates for a competitive advantage*
- *A fresh new design for a more satisfying end-user experience*
- *Improved reporting features*
- *A more scalable system as your Company grows*
- *Easier extraction of your business critical data*
- *Improved integration capabilities with your other business systems to reduce double entry of data and reduce errors*
- *Improved data management capabilities for more robust data and business reports*
- *A smooth transition for Version 6 users*
- *New functionality*

Enhanced product offering

Our product offering under Version 7 is as follows:

Lite	The Lite version continues to be supported under Version 7
Professional	Professional is the new name for the old FULL version. It now includes “Power Routines” and the “Resource-based Export to Microsoft Project” as standard features.
Corporate	A new Corporate version has been introduced. Corporate includes an amazing new feature called “Regionalisation” which is designed for organisations operating across wide geographical areas where pricing varies.

For a full breakdown of the features in Lite, Professional and Corporate please visit the SOLUTIONS area of our new website www.benchmarkestimating.com.

Latest technology including Microsoft SQL Server®

The technical enhancements listed in the table below combine together to deliver many benefits to you including:

- *Improved performance by up to 74%~*
- *Increased staff productivity*
- *More robust data and business reporting*
- *Easier integration of Benchmark Estimating Software with other systems*
- *A system that is more scalable as you grow*

Feature	Description and Benefit
Client-server technology	Version 7 uses client server technology so less data is transferred over your network – this helps with speed of operation and offers users a more satisfying and productive experience.
Microsoft SQL Server® database management system	<p>Using one of the industry’s leading database management systems, Microsoft SQL Server®, Benchmark Estimating Software Version 7:</p> <ul style="list-style-type: none"> ▪ Saves and manages your critical estimating data more effectively. ▪ Makes your estimating data more accessible - offering superior integration opportunities. ▪ Processes your data centrally so it helps to save you time. ▪ Allows businesses with Microsoft SQL Server to leverage existing infrastructure and skills. <p>For clients who do not have Microsoft SQL Server, your Benchmark Estimating Software CD includes Microsoft SQL Server 2008 Express which is the “free” edition of Microsoft SQL Server.</p>
Microsoft .NET® Framework	<p>Benchmark Estimating Software Version 7 is based on the Microsoft .NET® Framework, the latest software development platform from the Microsoft Corporation.</p> <p>This ensures that Benchmark Estimating Software will continue to work with the latest Microsoft operating systems and business software, and also helps the Benchmark Estimating Software developers to produce leading edge software for the end benefit of our clients.</p>

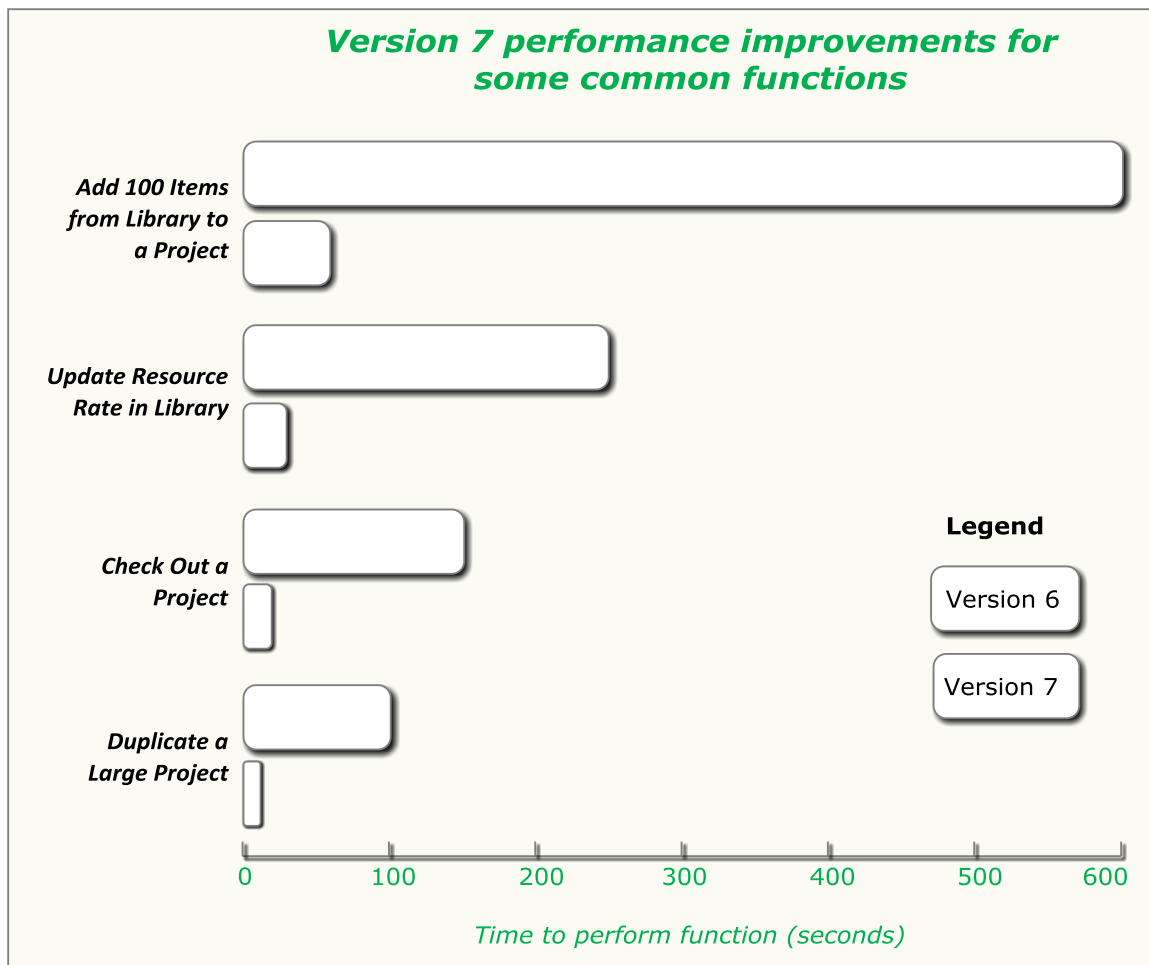
Feature	Description and Benefit
Crystal Reports®	All reports in Version 7 have been written in Crystal Reports®, an industry standard report-writing tool. This provides more powerful reporting features including the ability to automatically export any Benchmark Estimating Software report to many formats including Microsoft Word®, Microsoft Excel® and PDF.
Better data management	Version 6 users gain additional, specific benefits as a result of these technical enhancements, including: <ul style="list-style-type: none">▪ Elimination of the “Check and Repair” operation which means less downtime▪ Elimination of the splitting of data files into segments as the data file grows in size, resulting in easier backups and integration with other systems▪ More compressed data file sizes for easier management of data

Speed improvements of up to 74%~

Version 7 is significantly faster than Version 6 due to the many enhancements made to the underlying technology. The increased speed offers clients many benefits including:

- *The ability to produce more estimates in less time*
- *More productivity from your key personnel*
- *Happier staff*
- *And a competitive advantage*

Testing across a Local Area Network where Benchmark Estimating Software is installed on end-user Computers, and the database is installed on a Server, has shown significant speed improvements in many common day-to-day tasks including those shown in the graph below~:



Stylish new design for a better end-user experience

A modern new interface design in every window offers users a more enjoyable estimating experience. The images below demonstrate this new design:

The screenshot shows the 'Project Sections' window. It features a toolbar at the top with various icons. Below the title bar, there are two main sections: 'Section' and 'Summary'.

Section Details:

- Number: 040
- Description: Set Out
- Overhead:
- Variation:
- Activity: [Dropdown]
- WBS Level: [Dropdown]
- Production Rate: [Input]
- Organisation: [Dropdown]

Summary:

- Project: \$306,016.49
- Sample project

Table:

Section	Description	Cost	Complete	Overhead
010	Preliminaries	\$112,500.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶ 040	Set Out	\$44,115.84	<input type="checkbox"/>	<input type="checkbox"/>
060	Clearing	\$15,500.67	<input type="checkbox"/>	<input type="checkbox"/>
070	Drainage	\$238,807.80	<input type="checkbox"/>	<input type="checkbox"/>

The new Project Sections window

The screenshot shows the 'Item Library' window. It has a menu bar with 'Report', 'Export', and 'Tools'. Below the menu bar is a toolbar with various icons and a search bar with 'Description' and 'Group' dropdowns and a 'Find' button.

Item Details:

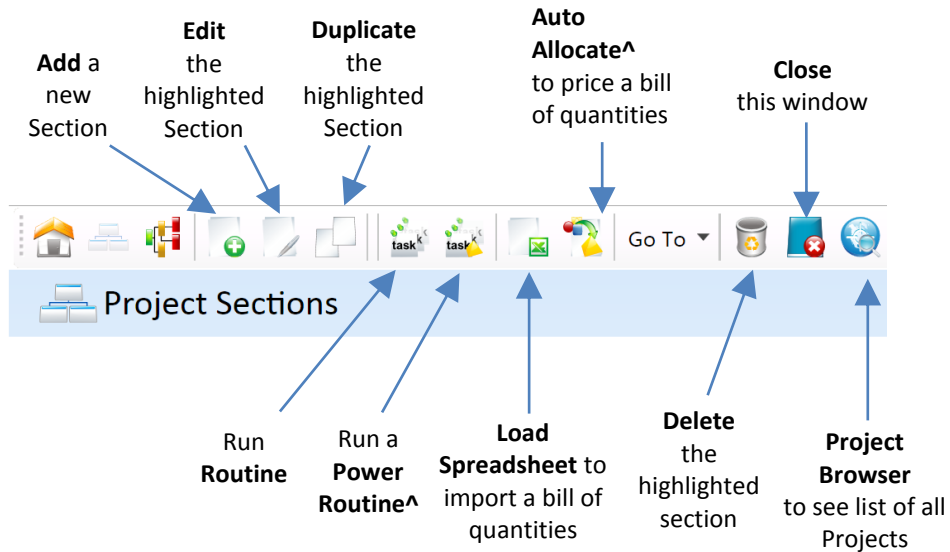
- Code: [Input]
- Description: K&G join ups - extra over machine pour to join to existing dished drain (SB) average 1.8m long
- Quantity: 1
- Unit: EACH
- Rate: \$143.32
- Cost: \$143.32
- Group: K&G - EXTRAS
- Production Rate: 0
- Unit: [Dropdown]
- Text: EXTRA OVER K&G MACHINE POUR RATE FOR JOINING TO IN SITU K&G
- Duration: 0 Days
- Takeoff Sheet Code: [Input]

Buttons:

- Documents
- Sub Item
- Text

The new Item Library window

New professionally designed icons have been added to the software. The icons have been carefully selected to relate more closely to their function. Examples of these new icons are contained below; for more information on the new icons refer to Appendix A.



The alternate shading for lines makes it easier on your eyes. The image below is from the new Project Browser window; here you can see that every second line has different background shading.

Quote	Job No	Project Description	Project Date ▲	Closing Date	Authorised
+	0002	Sample Project with Variations	25/01/2007		<input type="checkbox"/>
+	0003	Sample project	08/02/2010		<input type="checkbox"/>
+	0004	Sample Civil Project with Variations	10/02/2010		<input type="checkbox"/>
+	0009	Sample subdivision	27/04/2010		<input type="checkbox"/>
+	0010	Sample project	07/06/2010		<input type="checkbox"/>
-		<input type="checkbox"/>

General functionality

Multiple windows

You can now have multiple windows open at the one time; for example you can have the Resource Library and a Project open and switch between the two without having to close the other window. You can also have different windows open on multiple monitors.

Improved order of toolbar icons

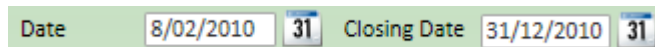
The order of icons on the toolbar when in a Project has been modified, so that the order is more consistent and logical in the key Project windows. Less used toolbar icons have also been moved under drop down menus to make the software easier to learn and use. Refer to Appendix A for more information on the toolbars.

Consistent <ENTER> key functionality

The <ENTER> key is now consistent in all multi-line text fields. Pressing <ENTER> is the same as selecting OK and pressing <Alt> + <ENTER> will insert a carriage return. This also means this functionality is consistent with other windows based software including Microsoft Excel®.

New Calendar function

New Calendar icons have been added next to all Date fields; clicking on the Calendar icon will open up a graphical Calendar so users can enter dates faster and easier.



Multiple database formats

Benchmark Estimating Software Version 7 supports multiple database formats which are Microsoft SQL Server and SQLite. The SQLite database can be used by single licensees and is also the format used by the Check Out function for optimum portability; this SQLite database is referred to in the software as a “Portable database format”. For more information on the database formats please refer to the new Installation Manual.

Collapsible screen areas

In some windows you can now hide/expand certain areas of the window to help view more or less of a particular window. For example in the Project Resource window as shown below you can click on the ▲ symbol to hide the Summary cost information.

▲ Summary		
Project	\$306,016.49	Sample project
Section	\$44,115.84	040 Set Out
Item	\$44,115.84	222 @ 198.72 , Asphaltic concrete

Renamed windows

Many window names have been modified to remove the term “Maintenance” from the end, making the software easier for people to learn and use (for example Project Details Maintenance is now Project Details).

Database Centre window

A new Database Centre window has been added which can list your common database(s) connections and also allow you to open any “portable databases”. This window also allows you to create and maintain your database connections. Under Version 7 a Database Connection is the name given to a “profile” for a database. This is a different concept to Version 6 and for more information on this please refer to the Installation Manual

Restore Database function

A new Restore Database feature allows you to restore a database from a backup. Access to the feature can be enabled or disabled in the Estimator Library.

For more information on this please refer to the Installation Manual.

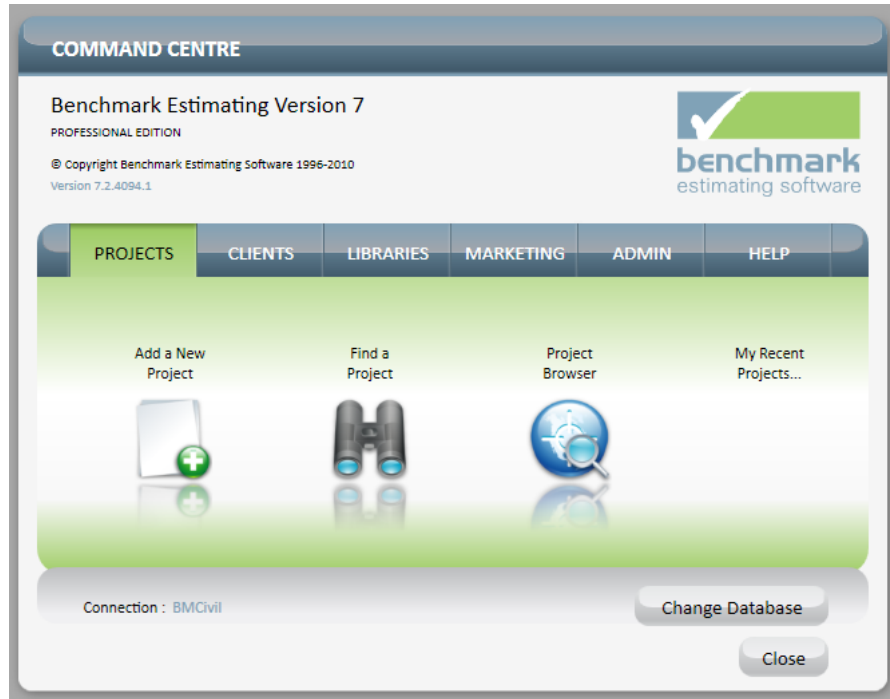
Email Support function

You can now email the Benchmark Estimating Software Support team directly from Benchmark Estimating Software. To do this simply click on the Email Support icon in the Command Centre > Help tab.

New Command Centre

More functional Command Centre

The new Command Centre brings all key features/windows together and accessible from one central location. This makes learning and using the software easier.



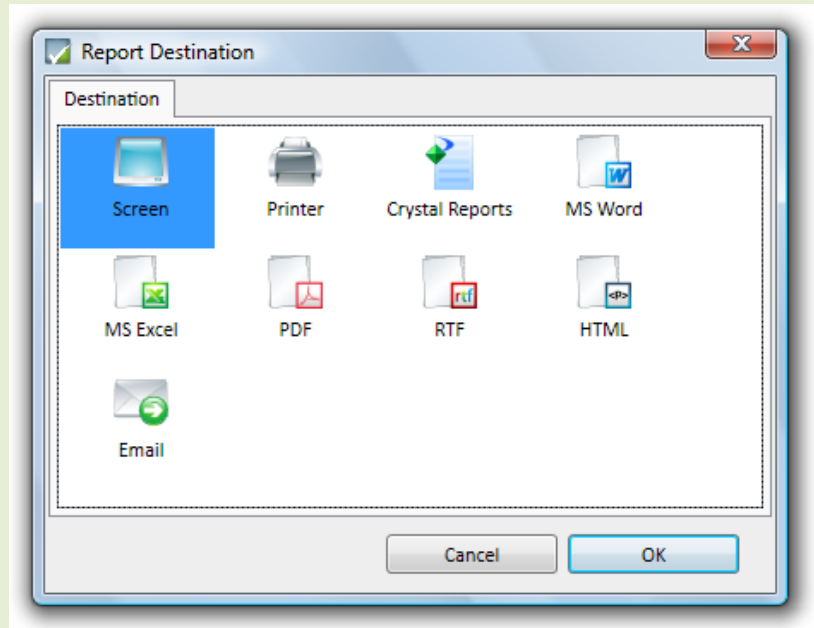
New “My Recent Projects”

The My Recent Projects option (shown in the image above) lists the most recent projects for the user as opposed to the most recent projects opened in the database. This saves time for every user opening up their recent projects.

Reports

Export any Report to Word®, Excel® and PDF formats

All reports are now written in Crystal Reports® which is an industry-leading report writing tool. Amongst other benefits this enhancement allows for the automatic export of any Benchmark Estimating Software report to PDF, Microsoft Word® and Microsoft Excel® formats.



New Project Summary report

The new Project Summary report provides you with a more transparent and professional high level summary breakdown of your estimate. You can view an example of this fantastic new report in Appendix B.

New Project Follow Up Report^

A new Project Follow Up Report will print out the list of Follow Up notes in a Project.

Microsoft Word Templates Table formatting feature^

A new function exists in the Administration window so that you can set up default formatting of the tables that can be created using the Microsoft Word Template function. This gives you more control over the professional presentation of the schedule of Sections/Items in your Word® quote.

**Microsoft Word
Templates %
merge marker^**

A modification to the Microsoft Word® Submission Price merge markers allows for the automatic calculation of a user-nominated % of the Submission Price. The calculated value is then automatically inserted into your Word Quote.

This feature is very useful if you wish to include automatically generated % based payment terms in your Word Quote generated by Benchmark.

For example if your Project Submission Amount was \$1,000,000 and you had the following in your Word Template:

Payment terms for this Project are as follows:

- 10% payment upfront:
<PROJECT_SUBMISSION_PRICE_*10%>
- 25% payment on delivery of materials to site:
<PROJECT_SUBMISSION_PRICE_*25%>
- 20% payment on completion of Phase 1 of the works:
<PROJECT_SUBMISSION_PRICE_*20%>
- 20% payment on completion of Phase 2 of the works:
<PROJECT_SUBMISSION_PRICE_*20%>
- 25% payment on final completion of the Project:
<PROJECT_SUBMISSION_PRICE_*25%>

Your resultant Word Quote would be populated with the following:

Payment terms for this Project are as follows:

- 10% payment upfront: \$100,000
- 25% payment on delivery of materials to site: \$250,000
- 20% payment on completion of Phase 1 of the works:
\$200,000
- 20% payment on completion of Phase 2 of the works:
\$200,000
- 25% payment on final completion of the Project: \$250,000

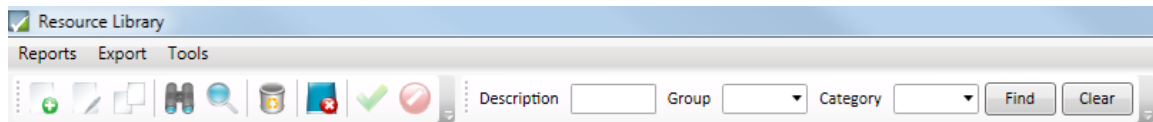
You can also use this new % syntax with the following merge marker: <PROJECT_TOTAL_PRICE_TAX_*20%>

The actual % value can be whatever value you wish it to be (i.e. it does not have to be 10 or 20 as per the examples above).

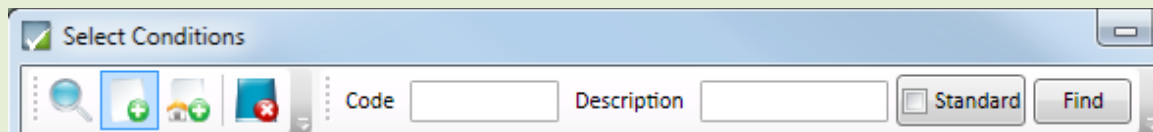
Improved Find functions

Consistency As a general change, previous Quick Find functions are now called Find functions, and previous Find functions have been renamed Advanced Find function. This helps with consistency of use and is more in line with other Windows based programs.

New Find functions in Library Toolbars New Find functions have been added to the toolbar in the Resource Library, Item Library, Routine Library, Client Library, Subcontractor/Supplier Library and Conditions Library. These functions help you find the records you are after with less mouse clicks.



New Find Functions for faster estimating in a Project New Find functions have been introduced into the toolbars in more windows when estimating in a Project – these are the Routine Selection, Select Conditions, Client Selection and Subcontractor/Supplier Selection



Show/Hide Find function in toolbar The new Find functions in the toolbar can be hidden and shown to suit a user's preference by right clicking in the toolbar.

Extras and profit calculation

Profit calculation You can now flag a Resource to *not* be included in Project Profit calculations. This can be done using the “Exclude Quantity from Markup” checkbox in the Project Resource window. This checkbox also exists in the Resource Library so you can nominate a Resource to be excluded from Profit calculations by default.

Extras When using the Resource Group Profit feature, a new tab is displayed so that the Resource Group Profit data entry is easier, and so the Extras screen is less cluttered.

The screenshot shows the 'Extras' window with the following data:

Group	Markup Percent	Cost	Cost Attracting Profit	Markup Amount
CONCRETE	10.00	27,110.55	27,110.55	2,711.06
DAY LABOUR	30.00	87,395.67	87,395.67	26,218.70
DGB	5.00	260,000.00	260,000.00	13,000.00
DRAINAGE	10.00	3,465.00	3,465.00	346.50
EARTH	10.00	20,040.00	20,040.00	2,004.00
FORMWORK	10.00	34,200.00	34,200.00	3,420.00
K&G	20.00	4,356.00	4,356.00	871.20
LANDSCAPE LABOU	10.00	17,054.04	17,054.04	1,705.40
OTHER	10.00	9,579.00	9,579.00	957.90
P-0003	10.00	3,000.00	3,000.00	300.00
PAINTING	10.00	36,000.00	36,000.00	3,600.00
PLANT	5.00	86,981.24	86,981.24	4,349.06
PRELIMINARIES	5.00	89,380.00	89,380.00	4,469.00
RCP	7.50	94,500.00	94,500.00	7,087.50

Summary Details:

- Direct Cost: \$660,561
- Indirect Cost: \$420,895
- Margin: \$179,186
- Provisional Sum: 50
- Submission Price: **\$1,260,643**
- DC Markup %: 27.13
- Margin %: 14.21

New Duplicate Project window

Duplicate Project window The many dialog boxes that used to be displayed when duplicating a Project are now contained in a new Duplicate Project window. This makes the duplicate process easier and it also provides the user with a clearer explanation of each option.

Duplicate Project

Duplicated Project is a New Job / Quote Check this and the duplicated Project will be given the next Quote No in the system. Leave unchecked if it is the same job and the duplicate will be given the next incremental Quote No (i.e. 100.01, 100.02). This checkbox will only be active if "Use Incremental Duplicates" is set in your Administration window.

Link Duplicated Project for Market Share Analysis Check this to link the duplicated Project to this Project for market share analysis (for example if you are duplicating the Project in order to price the exact same Project for a different Client). Leave unchecked if the original and duplicated project are not linked in any way for market share analysis.

Retain Job Number Details in Duplicated Project Check this to retain the Job No data. If you leave the checkbox unchecked the contents of the Job No field will be cleared in the duplicated Project. This checkbox will only be active if "Use Incremental Job Numbers" is set in Administration.

Retain Current Resource Rates in Duplicated Project The duplicated Project will be the same rate as this original. Leave this unchecked and Benchmark will update the Project with current rates from your Resource Library.

Relink and update all Resources in the Duplicated Project from the Resource Library This can only be selected if the "Retain Current Resource Rates in Duplicated Project" option is clear. Check this and Benchmark will relink and update all Resources (which are unlinked and have matching Resource codes) with the current data from the Resource Library. Leave this unchecked and Benchmark will only update linked Resources.

Duplicate Progress Claims Check this to duplicate your Progress Claims. Leave this unchecked and the Progress Claims will not be duplicated.

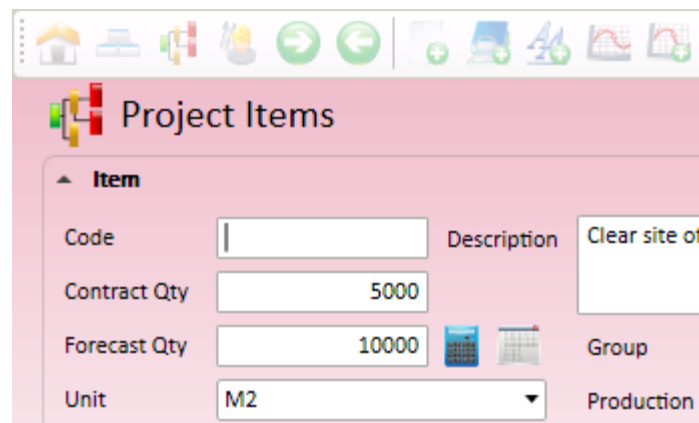
Duplicate Documents Check this to duplicate the Project and Item Document hyperlinks. Leave this unchecked and the Documents data will be cleared.

New Forecast Quantities function

Forecast Quantities^

The new Forecast Quantities feature is designed for longer term contracts where a user believes that their Client has calculated some Item quantities incorrectly.

The feature allows an Estimator to “model” what they believe will really happen on a longer term contract, by giving them the option to enter two quantities for every Direct Cost Item in a Project – these quantities are called the Contract Quantity and Forecast Quantity, as shown below.



The screenshot shows a software interface titled "Project Items". It features a toolbar at the top with various icons. Below the title bar, there is a section labeled "Item" with a dropdown arrow. The form contains several input fields: "Code" (empty), "Description" (with a "Clear site of" button), "Contract Qty" (with the value "5000"), "Forecast Qty" (with the value "10000"), and "Unit" (with a dropdown menu showing "M2"). There are also icons for a calculator and a calendar next to the "Forecast Qty" field, and labels for "Group" and "Production" on the right side of the form.

The user can also add Items into a Project that their client has not specified – these Items will not be printed on the Quote but will be taken into account in the calculation of the Submission Rates for the Items.

The Forecast Quantity feature is enabled on a user by user basis in the Estimator Library.

For more information on this powerful feature refer to Appendix C.

Regionalisation*

Regionalisation This feature is ideal for organisations operating across wide geographical areas where pricing varies. You can have a different Rate for each Resource for each Region you operate in; this is shown in the image below from the Resource Library of the Corporate Version.

Region	Rate	Subcontractor	Is Plugged	Date Updated
GLOBAL	75.00	...	<input checked="" type="checkbox"/>	31/08/2008
Metro	110.00	...	<input type="checkbox"/>	9/07/2010
Far North	95.00	...	<input type="checkbox"/>	9/07/2010
South	90.00	...	<input type="checkbox"/>	9/07/2010
Far South	82.50	...	<input checked="" type="checkbox"/>	9/07/2010
East	100.00	...	<input type="checkbox"/>	9/07/2010
Mid North	87.50	...	<input type="checkbox"/>	9/07/2010
North West	120.00	...	<input type="checkbox"/>	1/01/2009

Each Estimator is assigned a default Region in the Estimator Library; this Region is automatically assigned to a Project when the user adds a new Project. When pricing an estimate, Benchmark Estimating Software automatically uses the Resource Rate for the Region that the Project is being constructed in.

Many of Benchmark Estimating Software's other Libraries can all be set up to be Region specific if required, including the Item Library, Subcontractor/Supplier Library and Routine Library. Additional user security permissions have also been introduced to implement further controls when using Regionalisation.

This amazing feature offers clients many benefits including smaller numbers of databases, more efficient administration of libraries, easier integration and more effective control of pricing.

This feature is available in the Corporate version only.

Administration window

New layout

This window has been re-organised so that the tabs relate mainly to functional areas so that similar settings are grouped together, as shown below.

The screenshot shows the Administration window with the following structure:

- Menu Bar:** File, Libraries, Administration, Report, Quote, My Reports, Export to Excel, Help
- Navigation Bar:** Extras and Spread, Follow Up, Scheduling, Progress Claims, Mandatory Fields, L
- Tab Bar:** General, Hide/Display Fields, Quote Defaults, Quote Logo, Quote Settings
- Quote Numbering Section:**
 - Last Quote No: 0018
 - Use Incremental Duplicates
 - Allow Edit of Quote Number
- Conditions Section:**
 - Mandatory Standard Conditions
 - Standard Conditions GST Inclusive: [Dropdown]
 - Standard Conditions GST Exclusive: [Dropdown]
 - Enter the Standard conditions to appear on Quotes as the first Standard condition, depending on whether the quote is exclusive or inclu
- Quote Email/PDF Settings Section:**
 - Email Subject: [Text Field]

Allow edit of

Prepared By field

A new checkbox can allow the Prepared By field in the Project Details window to be edited.

New default location to save Emailed Reports^

A new field has been added to specify where Emailed Reports are to be saved; previously this was driven by the location of the Default Word Template.

New Auto Allocate options^

- A new option called “Use Auto Allocate Acceptance Level” will prompt the user for a percentage Match when running Auto Allocate. By default Auto Allocate will bid an Item automatically if it finds a 100% match – this offers clients the ability to “relax” this rule to make Auto Allocate more flexible.
- A new option called “Postpone Auto Allocation of Unmatched Items” will automatically skip any Items that do not have a match, during the Auto Allocate operation, and will leave these Items until the end of the Auto Allocate process.

Default table settings for Microsoft Word reports^

A new function has been added, to allow you to set up default formatting of the tables that can be created using the Microsoft Word Template function.

Budgets are now set up in Admin^

The Budget settings which used to be in the Project Analysis window are now in the Administration window.

Estimator Library

Improved order of Access Levels

The order of Access Levels has been modified so that common Access Levels are grouped together.

New Restore Database Access Level

There is a new access level called “Restore Database” which relates to the new Restore Database function. Access to the function should only be given to system administrators.

Controlled definition of an Administrator

An Administrator in the Estimator Library now has defined Access Level permissions; when a user is marked as an Administrator, these rights are set automatically by the system and this gives the Administrator default “full” access.

Edit Password button

A new Edit Password button has been added which must be clicked on to allow editing of the password for a user.

Read Only Access Levels

Read only access now is available for the Item Library and Subcontractor/Supplier Library. This is implemented by entering a 2 as the Access Level for these two Libraries.

Advanced Project Access controls*

Users of the Corporate version have an additional Project Access level which allows users to view Projects in nominated Regions. A user therefore can be assigned one of the following three Project Access permissions:

- My Projects only
- Projects in selected Regions
- All Projects in database

Improvements to Import and Export features

Import Summary Report

After you import data into your Libraries you are now given the option to view a Report showing a summary of the data imported. This can help if the data cannot be imported due to conflicts or errors in the data being imported.

More flexible and consistent Export options

Exporting from the Libraries gives you more options and is more consistent across all Libraries – you can select to Export all records, all listed records or only highlighted records.

Consistent options to create Codes automatically during Import

Importing data into your Libraries will now give the user the option to create Codes automatically, assuming the user running the Import has access to the Codes window.

New Select All button when importing Resources

Importing Resources provides users with the option to Select All Resources at the click of a button rather than having to scroll down and highlight all Resources manually.

Other enhancements

Routines

A Round up and Round down function has been implemented in Routines. The syntax for these functions is `rndup(number,dp)` and `rnddown(number,dp)`; here the number will be rounded up or down depending on the number of decimal places (dp).

Calculator

- The size of the Calculator window and size of the buttons on the Calculator have been made larger so that they are easier to read.

- Support for CEILING and FLOOR functions within the Calculator allow you to round up and round down (respectively) to the nearest multiple of 10, 100, 1000 etc. For example:

`CEILING(1020,100) = 1,100`

`CEILING(1020.12,1) = 1021`

`FLOOR(iq()/100,10)` will round down the result of the calculation (Item Quantity / 100) to the nearest multiple of 10

Progress Claims^

- A rule has been implemented so that claimed Items can't be deleted from a project. Claimed Items are also now highlighted differently in the Spread window.

- The Progress Claim Input window uses a new integrated spreadsheet component and with this the keyboard commands to move around cells are slightly different. Pressing <ENTER> or <DOWN> now moves you to the next input cell like a normal spreadsheet; previously <TAB> would move you to new cells.

Project Analysis^

The Budget window has been removed from the Project Analysis window and is now in the Administration window.

Sub Items^

- Sub Items in a Project are now accessed by double-clicking on the Sub Item in the Project Resource window.
- More data can be saved with a Resource inside a Sub Item; this includes the Text field and the Subcontractor/Supplier field.
- Sub Items are still created in the Item Library, however, they are *not* now automatically added to the Resource Library. This makes understanding of Sub Items easier for the user.

Project Details window

- The Prepared By field can now be edited if enabled in the Administration window.
- The Email Log[^] window has been moved to the Client Details tab on the Project Details window to make it more visible to the user.
- Analysis tab – a Project can now have a Pending status.
- Selecting a Client is done by clicking on the Information icon now rather than using a drop down – this brings up a new Client Selection window with a Find function which gives you more power when searching for clients. You can also clear a Client much easier now by clicking on the Information icon and selecting Clear. This functionality also exists for the Principal field.

Resource Production Rates

Resource Production Rates work slightly different in that you can only assign a Resource Production Rate Group to a selection of Resources if a Production Rate Line has already been added. This helps eliminate the chance of Resource calculations referencing production rate lines that don't exist.

Text Items

A new "Add Text Item" function in the toolbar and right click menu has been included to allow the user to add Text Items much faster. This is available in the Item Library and Project items windows.

Load Spreadsheet

If you have access to the Codes window you can elect to create Codes automatically during the importing of a Spreadsheet.

Power Routines[^]

- Power Routines is now a standard feature in the Professional version.
- Power Routines now contain an "integrity checker" which allows users to review the "mapping" of Routine Questions to Spreadsheet columns, and additionally it allows users to modify the mapping if they see an error.
- If the user has access to the Codes window then they can now elect to create Codes automatically during the import process in Power Routines.

Resource-based Export to Microsoft Project^ This function is now a standard feature in the Professional and Corporate versions.

Subcontractor Manager^ The “Panel Contractor” option has been removed to make this function easier. Using the Subcontractor Manager for a Panel Contractor scenario can still be achieved though.

Integrated Spreadsheet The integrated spreadsheet software (used for Quantity Takeoff Sheets, Progress Claims and other areas of the program) has been improved to use a more flexible spreadsheet program that is easier to integrate into the software.

Project Browser A new Find Items function allows you to search for Projects that contain particular Items.

Appendixes:

A – Overview of new Icons in a Project

B – New Summary Report

C – Forecast Quantities Information

Appendix A – Overview of new Icons in a Project

The Project Details window

If you add a Project or open a previous Project you will first be in the **Project Details** window. This window displays the main data about a Project including summary costs, and also provides access to the majority of project Reports and other key functions.

Project Details

Quote No: 30 Title: Sample Project

Job No: []

Date: 16/07/2010 Closing Date: 31 Closing Time: []

Notes Documents

Client Details Analysis Comments Conditions Project Data

Principal: []

Client: []

Salutation: []

Contact: []

Phone: [] Fax: []

Mobile: [] Email: []

Quote Re: []

Quote Introduction: [This is a user definable quote introduction. This text is edited from the Constants tab in the Admin Screen]

Send [] Emailed []

Email Log []

Map Reference: []

Location: []

Suburb: [] Postcode: []

State: [] Region: []

Job Category: [] Depot: []

DC Markup %	0.00	Direct Cost	\$0.00
Markup %	0.00	Indirect Cost	\$0.00
Margin %	0.00	Margin	\$0.00
		Provisional Sum	\$0.00
		Submission Price	\$0.00

Click to Recalculate

GST %: 10

Complete [] Un-Complete [] Authorise [] Checked Out []

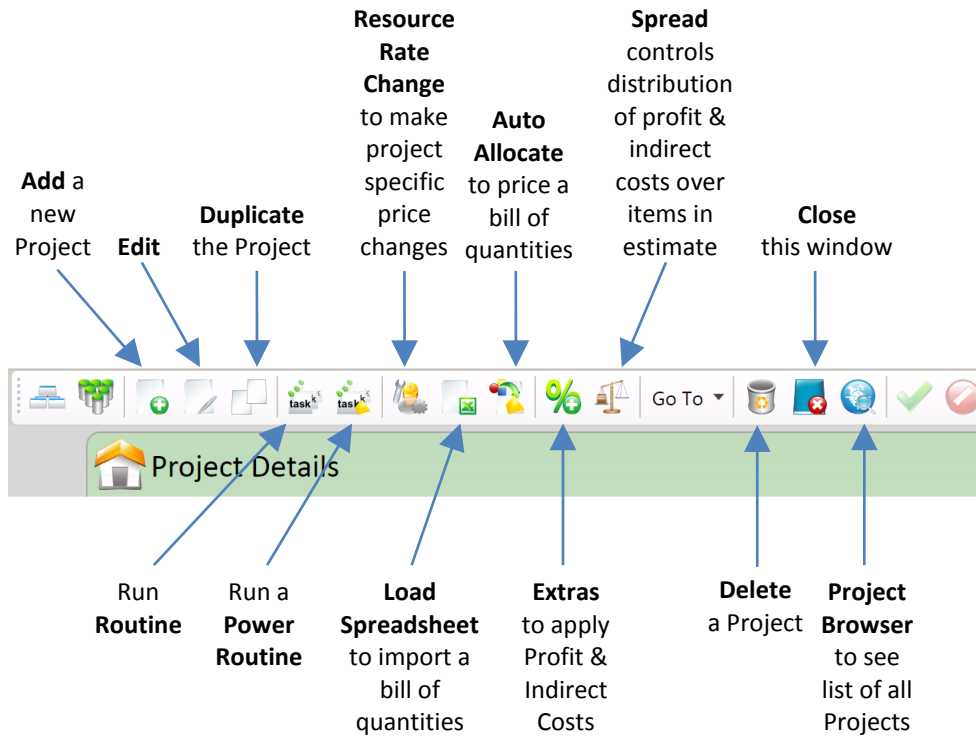
Navigating to other levels of the estimate



Click on the Section icon in the toolbar to go to the **Project Sections** window and view/edit the Sections for a Project. You can also press <CTRL+1> on the keyboard to go to the Section level or right-click and select Section.

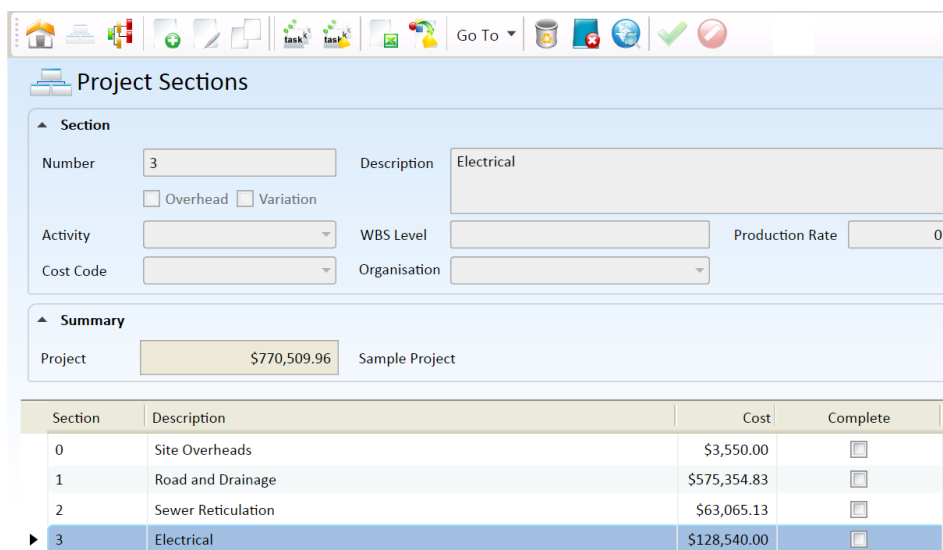
Toolbar Functions

The image below illustrates some of the functions in this screen.



The Project Sections window

The **Project Sections** window lists the Sections in your Project.



Navigating to other levels of the estimate

The table below illustrates how to navigate to other levels of the estimate.



Click the Project icon to return to the **Project Details** window.

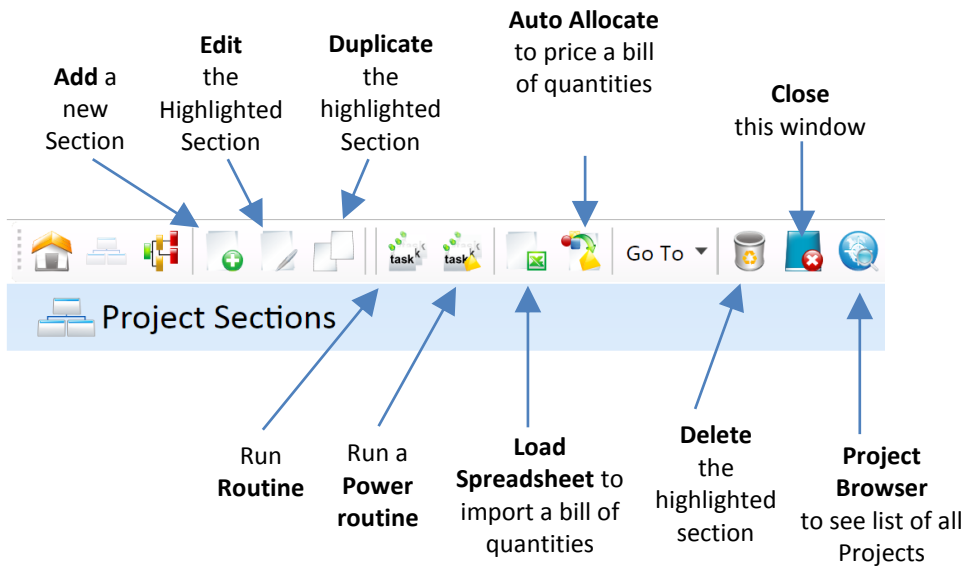
You can also press <CTRL+2> on your keyboard to go “up” to the **Project Details** window.



Click the Item icon to go to the **Project Items** window for the highlighted Section. You can also press <CTRL+1> on your keyboard to go “down” to the Item level. You can also double-click on a Section to go to the **Project Items** window for that Section.

Toolbar Functions

The image below illustrates some of the basic functions in this screen.



The Project Items window

The **Project Items** window lists the Items for the Section you are currently in; an example is shown below.

The screenshot shows the 'Project Items' window with the following details:

- Item Code:** 225OTRuPVC
- Description:** uPVC 225mm - STORMWATER CLASS IN OTR TRENCH<1.5M
- Quantity:** 15
- Unit:** METRE
- Group:** PIPEWORK
- Production Rate:** 0
- Text:** ALLOW A LAYING RATE OF 12 METRES PER HOUR. THIS INCLUDES 5% WASTE ON THE PIPES.THE TRENCH IS 0.6M WIDE. DEPTH OF BEDDING SAND IS 0.2 METRES DEEP.

Summary Table:

Line	Code	Description	Quantity	Unit	Rate	Cost
1	100OTRuPVC	uPVC 100mm - STORMWATER CLASS IN OTR TRENCH<1.5M	23.00	METRE	\$64.61	\$1,486.03
2	150OTRuPVC	uPVC 150mm - STORMWATER CLASS IN OTR TRENCH<1.5M	265.00	METRE	\$70.91	\$18,790.97
3	225OTRuPVC	uPVC 225mm - STORMWATER CLASS IN OTR TRENCH<1.5M	15.00	METRE	\$76.93	\$1,153.92

A callout box points to the 'Section' field in the summary, stating: 'The Section you are in is displayed here.' The section is '2 Sewer Reticulation' with a total cost of \$63,065.13.

FIGURE 1 - PROJECT ITEM WINDOW

Navigating to other levels of the estimate

The table below illustrates how to navigate to other levels of the estimate.



Click the Project icon to return to the **Project Details** window.



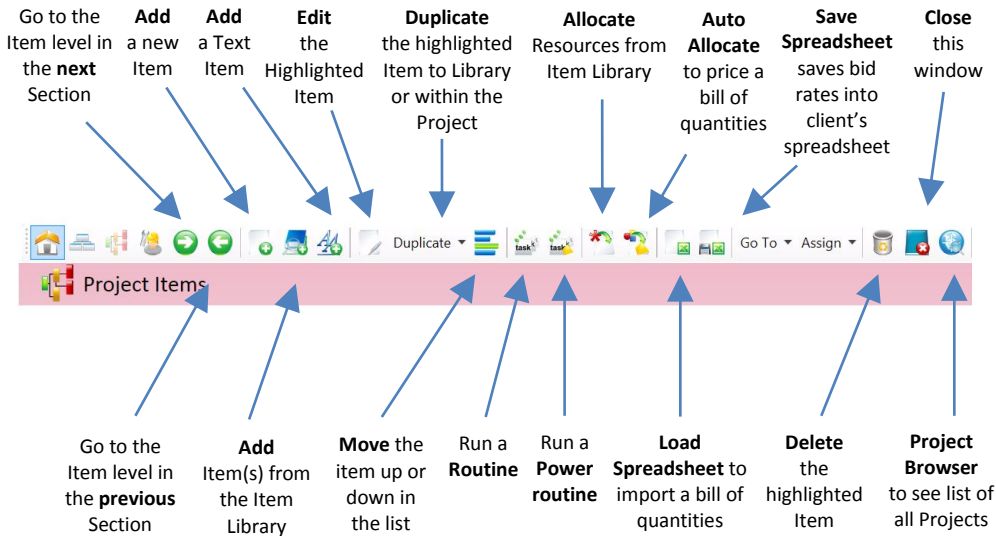
Click the Section icon to go to the **Project Sections** window. You can also press <CTRL+2> on your keyboard to go “up” to the Section level.



Click the Resource icon to go to the **Project Resources** window (the Resource level) for the currently highlighted Item. You can also double click (or press <CTRL+1> on your keyboard) on an Item to “drill down” to the Resource level of an Item.

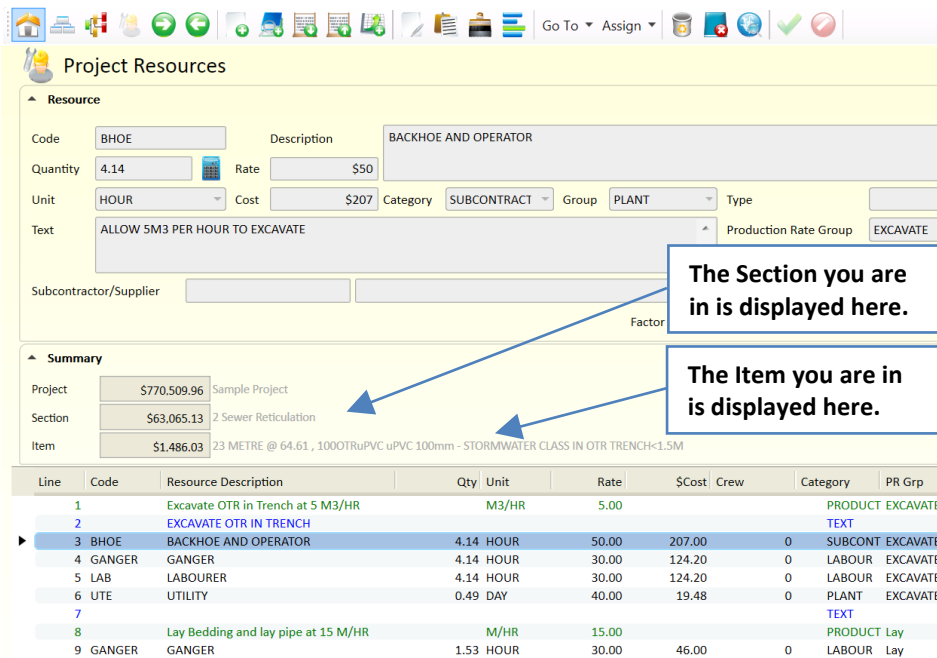
Basic Functions

The image below illustrates some of the basic functions in this screen.



The Project Resources window

The **Project Resources** window lists the Resources for the Item you are currently in; an example is shown below.



Navigating to other levels of the estimate

The table below illustrates how to navigate to other levels of the estimate.



Click the Project icon to return to the **Project Details** window.



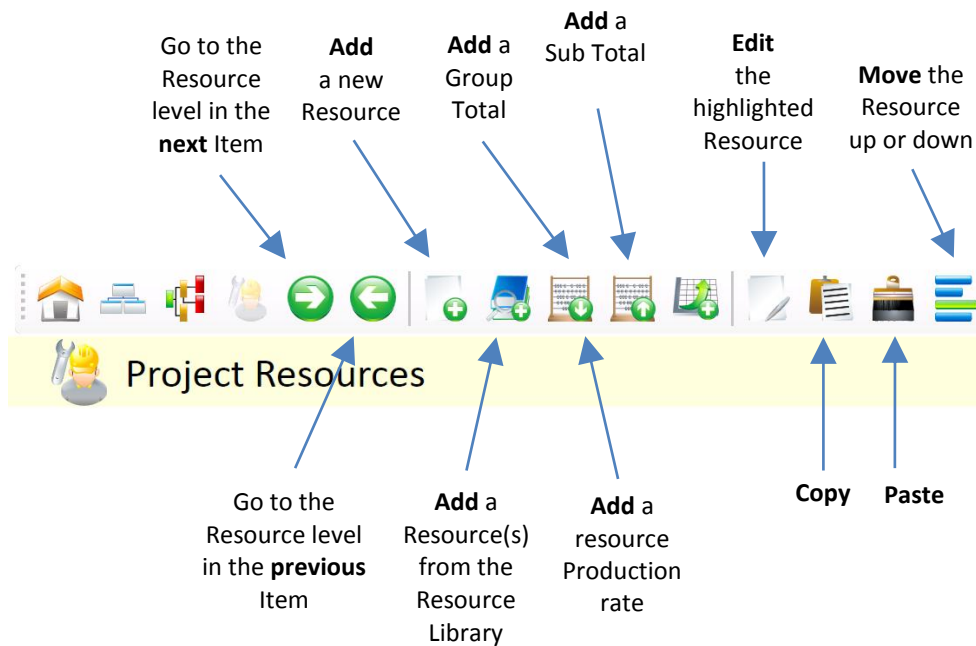
Click the Section icon to go to the **Project Sections** window.



Click the Item icon to go to the **Project Items** window (the Item level). You can also press <CTRL+2> on your keyboard.

Basic Functions

The image below illustrates some of the basic functions in this screen.



If you are using Sub Items then the toolbar functions in the **Project Sub Items** window are very similar to that of the **Project Resources** window shown above.

Appendix B – New Summary Report

This report is shown on the following 2 pages

Project Summary

Project Details

Quote No:	0003	Date:	08 Feb 2010
Project Title:	Sample project	Closing Date:	31 Dec 2010
Location:	100 Mona Vale Road, Sydney	Estimator:	Administrator
		Client:	Regional Developments (Wollongong)

Cost Summary

Direct Costs

Plant	\$10,251.05	0.59%
Labour	\$404,353.36	23.33%
Materials	\$1,046,498.82	60.38%
Subcontract	\$272,010.10	15.69%
Sub Total	\$1,733,113.34	

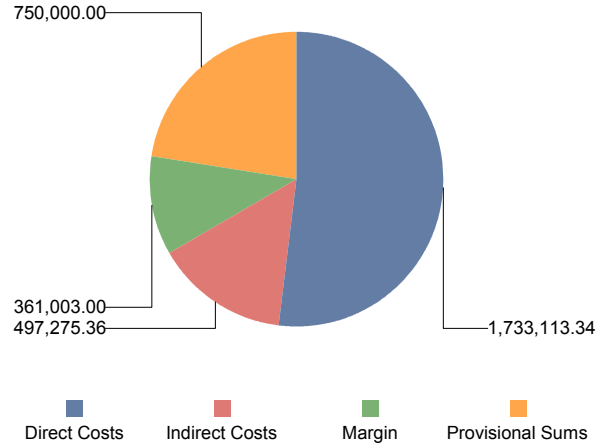
Indirect Costs

Overheads	\$360,619.69
Contingencies	\$136,655.67
Sub Total	\$497,275.36

Profit (Margin) \$361,003.00

Provisional Sums \$750,000.00

Submission Price \$3,341,391.70



GST @ 10% \$334,139.17

Price Plus GST \$3,675,530.87

Direct Cost Markup %	20.83%	= Profit / Direct Costs
Markup %	16.19%	= Profit / (Direct Costs + Indirect Costs)
Margin %	13.93%	= Profit / (Submission Price - Provisional Sums)

Note that a more detailed breakdown of all costs for this project are contained in the following page.

Estimate Approval

Position	Name	Signature	Date
----------	------	-----------	------

Project Summary

Quote No: 0003

Direct Costs (DC)				
	Plant	Labour	Materials	Subcontract
Direct Costs	\$10,251.05	\$404,353.36	\$1,046,498.82	\$272,010.10
Total Direct Costs				\$1,733,113.34

Indirect Costs				
Overhead Sections	Plant	Labour	Materials	Subcontract
Preliminaries	\$77,500.00	\$35,000.00		
<i>Sub Total</i>	\$77,500.00	\$35,000.00		\$112,500
<i>Sub Total of Direct Costs Sections Labour</i>		\$404,353.36	(1)	
<i>Sub Total of Direct Costs Sections</i>		\$1,733,113.34	(2)	

Overheads

Overheads 1	7.75%	of (2)	Company Overhead	\$134,316.28
Overheads 2		of (2)		\$0.00
Overheads 3		of (1)		\$0.00
Supervision	2.00%	of Direct Costs		\$34,662.27
Training	2.00%	of Direct Costs		\$34,662.27
Small Tools	4.00%	of Direct Cost Labour		\$16,174.13
Wet Weather	7.00%	of Direct Cost Labour		\$28,304.74

Contingencies

Contingency 1	5.00%	of (2)	Hitting Rock	\$86,655.67
Contingency 2				\$50,000.00
Contingency 3				\$0.00
Contingency 4		of (2)		\$0.00
<i>Sub Total of Overheads and Contingencies</i>		\$384,775.36	(3)	

Total Indirect Costs \$497,275.36

Profit

Profit On Resources

		Direct Costs attracting Profit	
Plant	20.00%	\$10,251.05	\$2,050.21
Labour	10.00%	\$404,353.36	\$40,435.34
Materials	5.00%	\$1,046,498.82	\$52,324.94
Subcontract	20.00%	\$272,010.10	\$54,402.02
<i>Sub Total of Costs attracting profit</i>		\$1,733,113.34 (4)	

Other 1	0.00%	of (4)	\$0.00
Other 2	10.00%	of (4)	\$173,311.33
Other 3			\$0.00
Indirect Costs Markup	10.00%	of (3)	\$38,477.54
Job Size Factor	0.00%		\$0.00
Spread Remainder			\$1.62

Total Profit \$361,003.00

Provisional Sums

Provisional Sums **\$750,000.00**

Cost Summary

Submission Price	\$3,341,391.70
Plus GST	\$334,139.17
Price plus GST	\$3,675,530.87

Appendix C – Using Forecast Quantities

This appendix provides you with an overview of what Forecast Quantities are used for and the changes that result in a Project when using this feature. This is generally a feature that will be used by advanced users on specific projects only, and should be read in conjunction with other related areas of the manual.

Firstly, Forecast Quantities are very useful for projects where your Client has provided you with a bill of quantities to price, and you believe that some of the Item Quantities are incorrect. With Forecast Quantities, the Estimator can therefore model what he/she thinks will “really” happen on a Project, thus obtaining more accurate Item Submission Rates and helping your business achieve greater profits.



To be able to use Forecast Quantities in a Project, the feature must be enabled for each user in the Estimator Library.

When an Estimator then starts a Project they will be asked if they wish to use Forecast Quantities for the Project. If they answer Yes, this will check the Forecast Quantity checkbox in the **Project Details** window > Project Data tab. With this checked, Forecast Quantities are enabled for the Project.

Projects estimated based on Forecast Quantities result in the following functionality and user interface changes within a Project:

- First and foremost each Direct Cost Item in the estimate will have two quantity fields, one for *Forecast Qty* and one for *Contract Qty*. Both of these fields are mandatory fields. If the user thinks the Contract Quantity value is incorrect they would enter the different quantity value into the *Forecast Qty* field.
- All Direct Cost calculations and reports (excluding Quote and Progress Claim reports) are based on the Forecast Quantity values.
- The **Spread** window changes significantly to display more data about the Contract and Forecast Quantity “scenarios”.
- The Spread calculations use the Forecast Quantity values to calculate the Item Submission Rates.

- All Quotes display the Contract Quantity values as this is what is conveyed to your Client. On the Quotes, the Submission Amounts for each Item are calculated based on the Contract Quantity values, and the Item Submission Rates which are based on the Forecast Quantity values. This means that the Submission Price you submit to your Client for a Project based on Contract Quantities may not equal the Submission Price you see on the **Project Details** window (which is based on Forecast Quantities).
- A checkbox called “Forecast” is activated on both the **Project Section** and **Project Item** windows. Any Section or Item marked as “Forecast” using this checkbox is taken into account in the Project calculations and therefore Submission Rate calculations, however, these Sections/Items **are not** displayed on any Quotes or Progress Claim reports. This allows the Contractor to effectively include additional Items that they think their Client may have missed. The result of this is that these “additional” Items contribute towards the resultant Submission Rates calculated by the system (i.e. it will result in the Submission Rates being increased).



When using Forecast Quantities, Benchmark Estimating Software features such as Load Spreadsheet and Add Item from Library and Routines will automatically populate the *Forecast Qty* and *Contract Qty* fields with the same initial values as entered by the user, or loaded from the spreadsheet.

The change in the Spread window

When estimating with Forecast Quantities, the **Spread** window contains additional summary information about the Project for both the Forecast and Contract Quantity scenarios, as shown below.

Summary		Forecast	Contract		Forecast	Contract		Forecast	Contract
Project Direct Costs	\$296,079.9	\$260,561.76	DC Markup %	11.69	11.69	Display Rate to	2	Decimal Points	
Markup Amount	\$58,151.02	\$50,448.07	Markup %	10.83	9.57	Display Amount to	2	Decimal Points	
Provisional Sums	\$24,000	\$24,000	Margin %	9.77	8.73	Calculate Rate to	2	Decimal Points	
Spread Remainder	0.11	0				if rate greater than	0		
Submission Price	\$378,231	\$335,010							

The columns that are displayed for each Item in the Project are also different when using Forecast Quantities for a Project, as can be seen below. You can still manipulate the data in the **Spread** window using the same steps as described in the previous pages.

VERSION 7.3 RELEASE NOTES

Contract Qty	Forecast Qty	Submission Rate	Direct Cost Rate	Markup %	Submission Amount		Margin		Direct Cost Amount		Rate Before Spread	Amount Before Spread
					Contract Qty	Forecast Qty	Contract Qty	Forecast Qty	Contract Qty	Forecast Qty		
2.50	5.00	\$707.07	\$625.00	0.13	\$1,767.68	\$3,535.35	\$205.18	\$410.35	\$1,562.50	\$3,125.00	\$625	\$3,125
7.50	15.00	\$62.22	\$55.00	0.13	\$466.65	\$933.30	\$54.15	\$108.30	\$412.50	\$825.00	\$55	\$825
15.00	15.00	\$45.25	\$40.00	0.13	\$678.75	\$678.75	\$78.75	\$78.75	\$600.00	\$600.00	\$40	\$600
2.00	4.00	\$339.40	\$300.00	0.13	\$678.80	\$1,357.60	\$78.80	\$157.60	\$600.00	\$1,200.00	\$300	\$1,200
4.00	8.00	\$169.70	\$150.00	0.13	\$678.80	\$1,357.60	\$78.80	\$157.60	\$600.00	\$1,200.00	\$150	\$1,200



It is important to remember that the Contract Quantity will be used on all Quote and Progress Claim reports with the Submission Rate that is generated based on the Forecast Quantities.



Version 7.3

Upgrade

More flexible estimating | Improved reporting
| Increased profits and a competitive
advantage

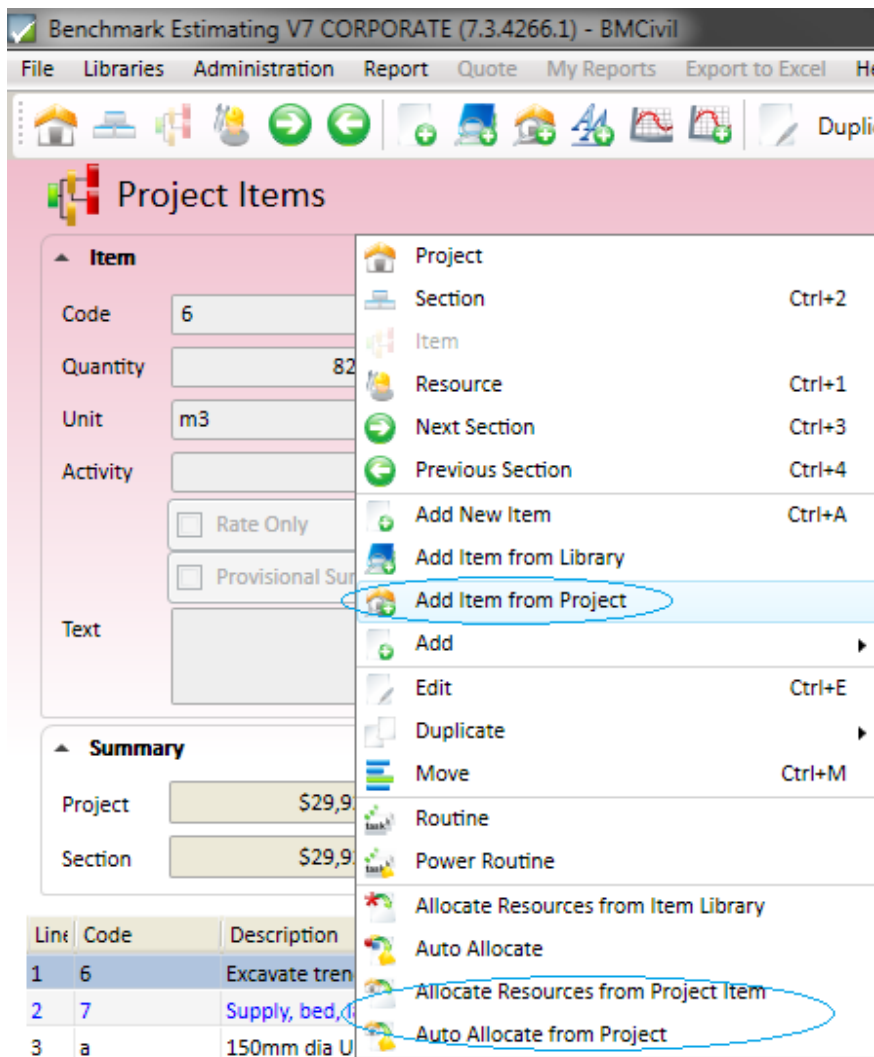
Using Items from other Projects

Three new features have been added to Benchmark Estimating Software that allow you to better utilise Items contained within other Projects. This saves you time and offers you greater flexibility in your estimating.

Adding Items from one Project to another

In the **Project Items** window you can now add Items to your existing Project, from another Project. This effectively provides you with a very easy method of copying and pasting Items between Projects. The process is simple:

1. Select "Add Items from Project"
2. Select the Project
3. Select the Items and enter the required quantities



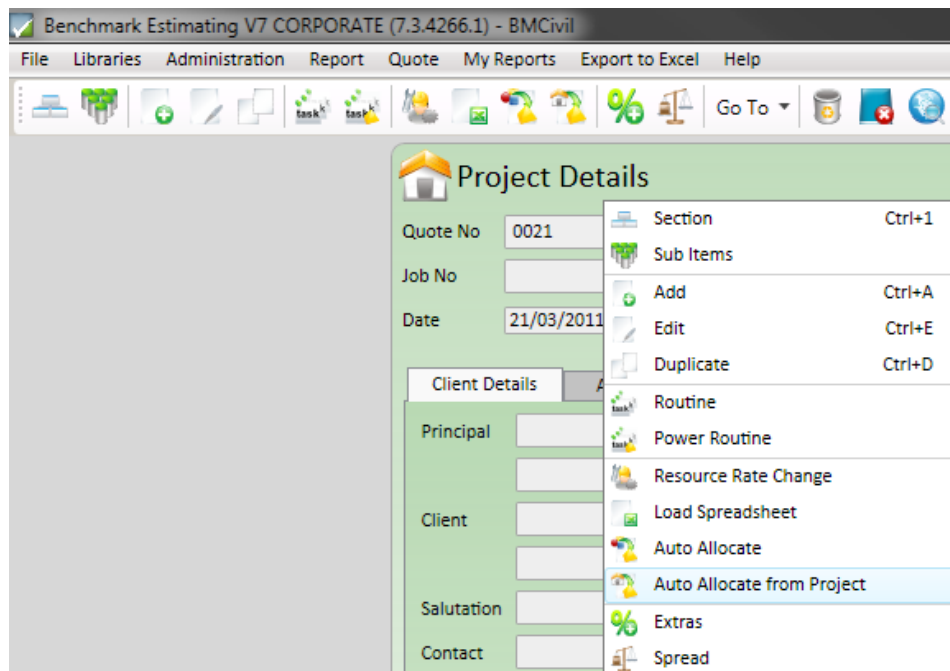
Allocate Resources from Project Item

This new feature performs a very similar function to “Allocate Resources from Item Library” – the difference is that you can now select an Item from another Project rather than from the Item Library. This offers you greater flexibility in how you price a Project, and it also provides users with a way of effectively copying and pasting Resources between Items in different projects.

Auto Allocate from Project

Auto Allocate can now use Items from another Project rather than using Items from the Item Library. You may use this feature, for example, if you are pricing a job related to a previously accepted Benchmark Estimating Software Quote, and you wish to use the same Item buildup as you did in the original Quote.

The new “Auto Allocate from Project” feature can be run wherever Auto Allocate can be run – in the **Project Details** window, and **Project Sections** and **Project Item** windows.



Copying Submission Prices during add/allocate Items from other Projects

For the above three new functions, you can also elect to copy the Submission Rates from the source Project into your current Project. You may do this for Maintenance type projects, for example, where previously agreed Submission Rates must be used. When this is done the Submission Rate that is copied into your existing Project is “fixed” in the **Spread** window.

There is also a new setting in the **Administration** window which can set the default status of the “Copy Submission Rate” option to on/off, for users of this feature.

Advanced Spread Calculation Method

The “Spread” calculation in Benchmark Estimating Software is what determines the Submission Rates for each Item in your estimate. Following requests from many clients we have implemented a new and advanced “Spread” calculation method. Users can still use the old Spread calculation method though if they wish.

Rather than an equal Spread done by the existing method, this new method looks at the Resource detail behind each Item together with the Plant/Labour/Materials/Subcontract Profit percentages in the **Extras** window (or Resource Group profit percentages in the **Extras** window if this is enabled), in order to work out the exact Profit to apply to each Item.

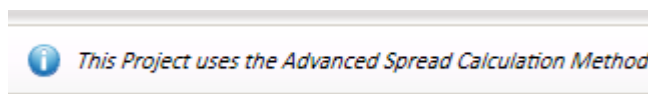
This new feature must be activated in the **Administration** window, in the Extras and Spread tab, before it will work. After it is activated it will then be applied in all new Projects.

Note that using the new Spread method will not change the resultant Project Submission Price, it will simply change the proportion by which Profit is applied to Items, so that the Submission Rate for Items will be different compared to if the normal Spread calculation was used.

In relation to this new feature *are some very important considerations* for existing users who are upgrading to Version 7.3 and can access Projects developed in versions prior to Version 7.3:

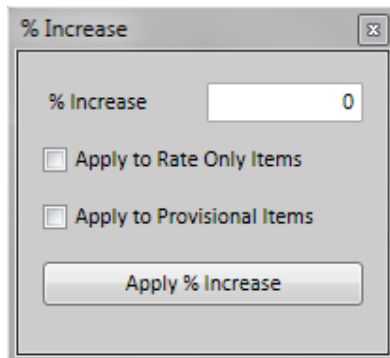
- Older projects using the old Spread method – Even if you have elected to use this new method, older projects will still utilise the older Spread calculation method to ensure that all quotes/reports/progress claims are consistent with what may have been quoted previously.
- Duplicating older projects – If you have the Advanced Spread method turned on in the **Administration** window, and you duplicate an old Project which uses the old method, you will be given an option to use the Advanced Spread method in the duplicated Project.

Projects that utilise the Advanced Spread method will indicate this in the Spread window as shown in the image below:



Percentage increase function in Spread

You can now apply a percentage increase to all Item Submission Rates in a Project in one operation. This is done in the **Spread** window. Initially designed for companies who work on Contracts and need to update Submission prices annually based on CPI, this feature can have other applications for users in other scenarios.



Section level Word Quotes

You can now generate a Word Quote for an individual Section in Benchmark Estimating Software, from the **Project Sections** window. This feature is ideal for Quotes or Approval Forms for Variations in particular.

Section	Description	Cost
1	Preliminaries	\$29,627.08
2	Drainage	\$325,256.83
V1	Variation One	\$11,666.67

Licensing and support documentation

Licensing

Benchmark Estimating Software now offers a fully concurrent licensing model, with an Enterprise licensing option available for larger organisations.

New Support Documentation

A re-organised and completely updated User Manual has been developed. A separate Installation Manual has also been developed. These manuals and the updated Help resources are all available from the Help menu within Benchmark Estimating Software.

V6 to V7 database conversion tool

A tool has been developed for Version 6 users to convert their Version 6 data (all data except Projects) to Version 7. This allows for a smooth transition to Version 7. This tool is provided on a separate CD to the Benchmark Estimating Software. Users should read the Installation Manual thoroughly before using this tool.

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Notes

^ Only available in the Professional and Corporate versions (not in Lite)

* Only available in the Corporate version

~ Testing conducted over a Local Area Network environment using Microsoft SQL Server as the database. The 74% increase may not be indicative of performance in all environments and individual results may vary.