

6.1 RELEASE NOTES

Trimble® Accubid Enterprise Software

- Introduction
- Compatibility/Technical Support
- New Features/Enhancements

Trimble Canada Ltd.
7725 Jane Street
Concord, Ontario L4K 1X4

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Release Notice

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Edition

This is the Trimble® Accubid Enterprise Software Release Notes. (Revision A_ENG); Release 6.1.

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Introduction

This document provides basic information about new features, enhancements, and modifications in release 6.1 of the Trimble® Accubid Enterprise software. More detailed information can be found in the online help system.

What You Receive With Release 6.1

- New/Enhanced features outlined in this document
- Updated online help
- Electronic documentation available on the Trimble Client Portal

Upgrade Procedure

In the installation routine, when you select the *Update database* option, the Enterprise software update installs only program modifications and enhancements. Your existing tables, specifications, and estimates are not impacted in any way.

Compatibility/Technical Support

Operating Systems

This version of the Enterprise software is compatible with 32-bit and 64-bit Windows® Vista®, Windows® 7, and Windows® 8 operating systems. For a more complete listing of Technical Specifications, please go to our website at mep.trimble.com to review the technical specifications for the Enterprise software.

Trimble® PipeDesigner 3D® Integration

The Enterprise software includes the ability to import drawing data from a Trimble® PipeDesigner 3D® drawing. Refer to the online help in each of the software applications for detailed instructions.

Accessing the Online Help

The online help is easy to use and is accessible through any of the following methods:

- Press the **F1** key at any time while using the program to display help for the current screen or dialog.
- Click **Menu** tab in any screen and then select **Help**. You can scan the Table of Contents, use the Index, or the Search functionality to find the information you are looking for.
- Use the **Index** tab to locate key words throughout the help system.

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- Use the **Search** tab to find specific words used in the help system; for example, you might search for the word delete for instructions on deleting certain data from your system.

Trimble MEP Client Services

Before calling Client Services, we suggest you consult the online help. Many of the common procedures and questions are covered in this system.

Trimble MEP Client Services (Enterprise software) is available between 8:30 a.m. and 8:00 p.m. Eastern Time, Monday through Friday.

Note – *We are not available on major holidays.*

North America

Toll-free Telephone 1-800-361-3030

Toll-free Fax 1-888-363-5466

Outside North America

Telephone 1-905-761-8800

Fax 1-905-761-1234

Internet e-mail

accubidsupport@trimble.com

Website

mep.trimble.com

New Features/Enhancements

Note – This document lists new features/enhancements/modifications according to the following categories:

- [Enterprise Estimating/Change Management](#)
Features are applicable to the Estimating and Change Management modules.
- [Enterprise Estimating/Enterprise Manager](#)
Features affect both the Estimating and Manager (database) modules.
- [Enterprise Manager](#)
Features affect the Manager module (database, security, and so on).
- [Price Updates](#)
Modifications applicable to only importing update pricing.

Enterprise Estimating/Change Management

The following enhancements and modifications have been made in release 6.1 of the Enterprise software.

Settings

Takeoff/Extension

A new Audit Trail Calculations setting is available under Settings / Options in the Takeoff/Extension pane. This setting allows you to decide how the software updates the Audit Trail when data is changed. The affected fields are Material\$, Labor Hrs, and Labor Factors.

You can select from the following values:

- **On Resolution**

Note – This is the currently default setting in the Enterprise software.

This setting allows the system to calculate and display values for these columns for takeoffs resolved in the current Audit Trail and performed by the current user. Things to keep in mind when selecting this option:

- Simply changing a value for the fields/columns will not automatically trigger a refresh.
- Values will not change until a resolution is triggered.
- You can right-click on a line in the Audit Trail and then select Calculate Material and Labor Values to force the software to calculate values for the selected lines.

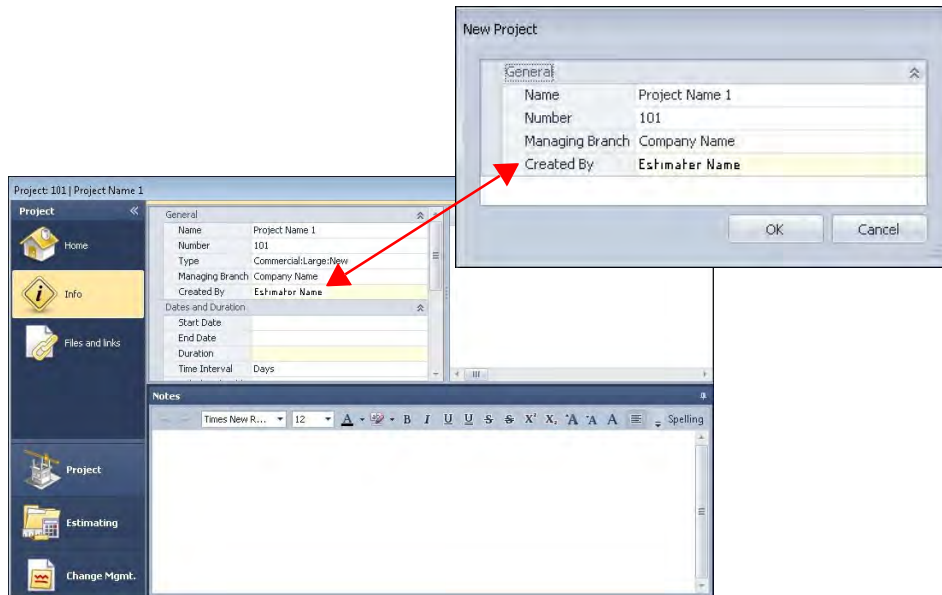
- **Never**

When this setting is selected, the Enterprise software will never calculate values for these items.

- **Always**
The Enterprise software will always calculate the values immediately when values are changed, this includes changes made to labor factors in Takeoff Breakdowns. (This is how previous releases of the Enterprise software handled updated data.)

Project Creation

When a project is created, the Enterprise software now includes the login name of the individual adding the project. You can view this field in the New Project screen, as well as in the Info screen. This field is not editable.



Estimates

Exclusive Mode

You now have the option of opening an estimate in Exclusive Mode. This mode should be used only by the lead estimator during the closing phase of a job. When opening the job in Exclusive Mode, only the person who opened the job in this mode can make changes. For other users opening the estimate, it will be in read-only mode.

Note – *The Exclusive Mode security is set in the Security Manager / Enterprise Manager software.*

Estimate Names/Numbers

In previously releases of the Enterprise software, unique estimate names were required. Release 6.1 allows you to use the same estimate name in another project. You must, however, assign a unique estimate number. (Estimate numbers cannot more than one time within the software.)

Note – *Within the same project, a unique name is still required per estimate.*

Measurement Conversion

This release of the Enterprise software provides for accurate measurement conversion of areas, weights, and volumes. When you change an estimate from one unit of measurement to another, a dialog box opens that allows you to select conversion units.

Note – *Trimble has included default lookup tables that cover most requirements for selection options to complete this conversion. If you need to create additional tables or edit existing ones, you can accomplish this in the Enterprise Manager application.*

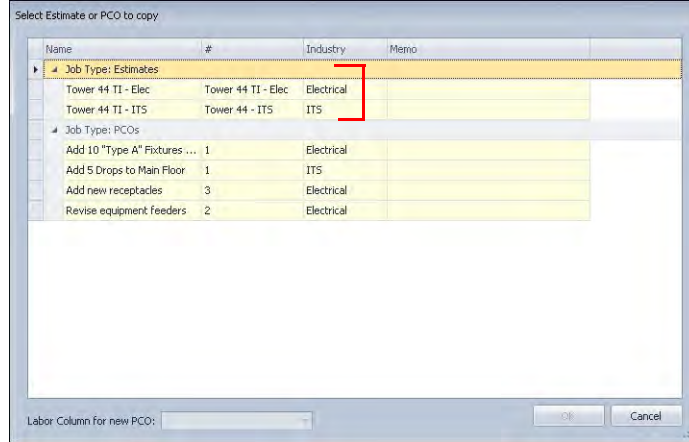
Filtering

In previous releases of the Enterprise software, when an estimate or PCO was set to *Freeze*, all filtering was unavailable. This restriction is lifted in the Enterprise 6.1 software release. You can now filter data as required.

Note – *The filtering enhancement applies to both estimates and change orders.*

Copy Estimates to Change Order

This release now offers the ability to copy an estimate to a change order, as well as the associated takeoff data.



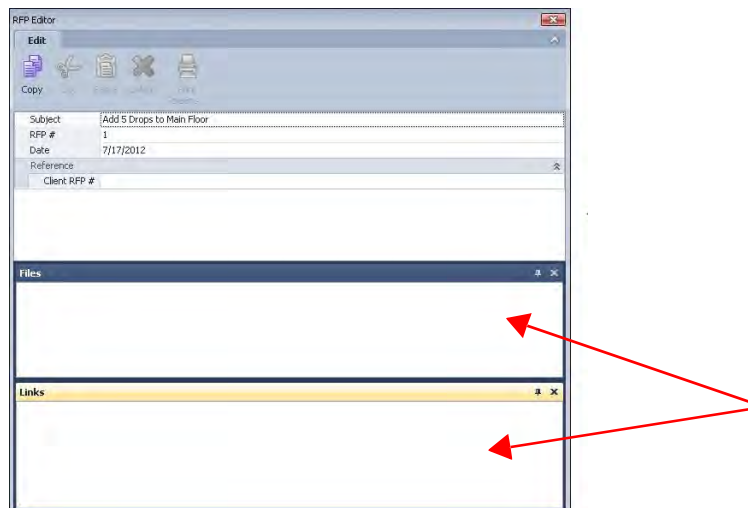
PCO Export

The Enterprise 6.1 software release supports exporting PCOs to a CSV, Excel, or MPX format. This procedure works similar to exporting an estimate.

Note – *Exporting a PCO to a template is not supported in the Enterprise software at this time.*

Files and Links

You now have the ability to attach files and links in the PCOEditor.



Designations

In this release of the Enterprise software, costing is no longer done within the Designation. It is now accomplished through the Quote screen (in Closeouts). This allows you to distribute quotes across all desired line items in Designations instead of manually entering quotes for each.

Designations	Name	Alarm	Component \$	Labor	Labor Factor Group	Labor Efficiency Factor	Cost Code 1	Cost Code 2
Designations	C - 4' 2L Industrial Chain Hung(2)	Off		0.650	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac
Lighting	A1 - 2x4 Drop-in 3L 277v(2)	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac
	A - 2x4 Drop-in 4L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac
	A1 - 2x4 Drop-in 3L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac
	A2 - 2x4 Drop-in 2L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac
	B - 2x2 Drop-in 2L 277v	Off		0.500	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Ac

Folder Path	Priced Elsewhere	Cost	Cost Adj%	Cost Adj. \$	Net Cost	Total Extended Cost	Tax %	Overhead %	Markup %	Total	Notes
Lighting										7,000	5,000

Name	Alarm	Takeoff Qty	Unit Cost	Cost Adj%	Cost Adj. \$	Net Unit Cost	Component \$	Unit Price	Extended Cost	Vendor	Notes
C - 4' 2L Industrial Chain Hung(2)	Off										
A1 - 2x4 Drop-in 3L 277v(2)	Off										
A - 2x4 Drop-in 4L 277v	Off		165.000								
A1 - 2x4 Drop-in 3L 277v	Off		165.000								
A2 - 2x4 Drop-in 2L 277v	Off		605.000								
B - 2x2 Drop-in 2L 277v	Off		385.000								


Additional enhancements include the following:

- You can create Incidentals and job items “on-the-fly” when you need them.
- Designations can easily be moved from one folder to another using drag-and-drop.
- Labor hours and costing can be distributed automatically.

Note – This feature is also available in existing projects; however, previously entered data is not affected by this change. Your current data remains unchanged.

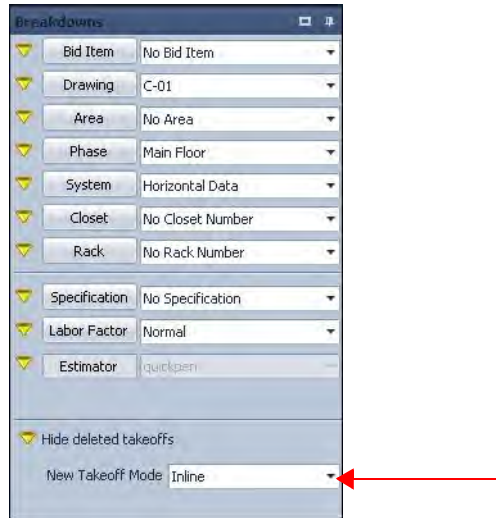
Takoffs

Sub-Takeoffs

The audit trail will now display an icon for sub-takeoffs .

Takeoff Mode

Release 6.1 of the Enterprise software offers the ability to quickly change between takeoff modes from within the Takeoff module. A new selection list is available in the Takeoff Breakdowns pane to accommodate this modification. When you want to change the mode, simply click ▼ and select the Takeoff Mode you want to use.



Trimble® PipeDesigner 3D® Integration

This release of the Enterprise software includes integration with the Trimble PipeDesigner 3D application. If you have the PipeDesigner 3D software, you can export a drawing and then import it into the Enterprise software. This creates a takeoff/audit trail based on the items included in the drawing.

Note – *The PipeDesigner 3D software is a three-dimensional piping design software system based on AutoCAD® compatible software. It is designed specifically for mechanical contractors, engineering firms, and manufacturers, who build, fabricate or design piping systems. This 3D piping design software uses Trimble's proprietary Virtual Solids Modeling Engine and is easy for both novice and experienced CAD operators to use.*

Contact your Trimble Sales Representative for more information on the PipeDesigner 3D® product.

Subcontractor/Vendors

Vendor Pricing Exports/Imports

Several enhancements have been made to the Vendor Pricing Export/Import process:

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- When you export vendor pricing to a spreadsheet, instead of the file name defaulting to the same name with each export, the name now defaults to **[Job Number]_[Vendor Name].xlsx**. This eliminates confusion when sending and receiving quote sheets to/from vendors.
 - You can now email a spreadsheet directly to the vendor from within the Enterprise software by clicking the **Email file** button. You do not need to manually export the vendor pricing when using this process; however, you must have an email program installed on the computer where you have the Enterprise program installed.
 - If you attempt to import pricing from a spreadsheet that contains another vendor's name, the Enterprise software displays a confirmation message to ensure this is what your intent is. This eliminates accidentally importing prices for the incorrect vendor.

Subcontractor/Vendor Quotes

When you hover your mouse over a vendor/subcontractor name in the appropriate quotes screen, a tooltip displays with the vendor/subcontractor address and phone number. This provides quick contact information to you.

Item Editor

The Item Editor now allows you to enter wall thickness when editing or creating items.

Note – *This feature will be useful for Mechanical estimators.*

Extension

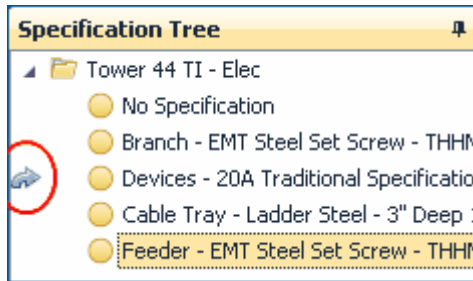
In this release of the Enterprise software, the Field Labor fields in the Extension module are open/editable. The default value pulls directly from the Designation; however, you can modify this value if desired.

- When you modify the value, it will show as pinned. You can unpin the field using the right-click menu.
- Unpinned values will be restored to the default (from the Designation).
- Re-extending causes the value to automatically become unpinned.
- Field hours remain as read-only.

Specifications/Systems

Specification Breakdowns Order

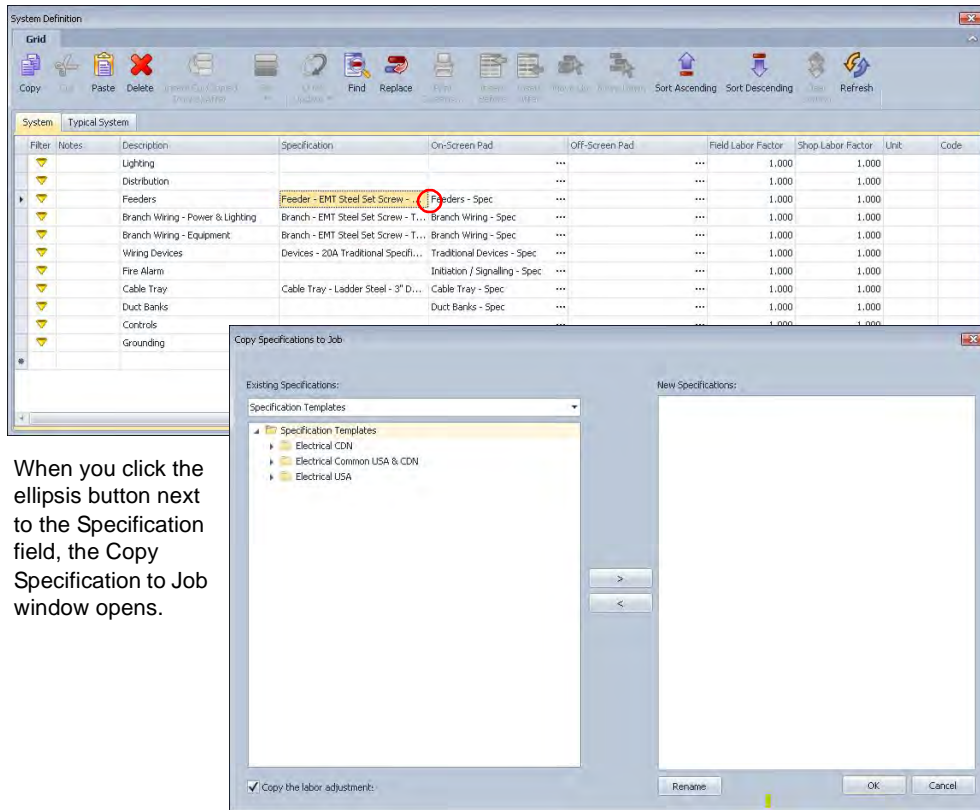
You now have the ability to organize the Specification Breakdowns as desired using drag and drop. This allows you to order the lists in a manner that makes sense for your company. For example, specifications used more frequently can be moved to the top of the list, making selection quicker and easier.



When you select a Specification, you can drag it and drop it when the arrow displays on-screen.

Systems/Add Specification

You no longer need to close the System Definition and then go to Specifications to create a new specification for assignment to your system. You can now add a specification through the System Definition (Takeoff Breakdowns) screen.



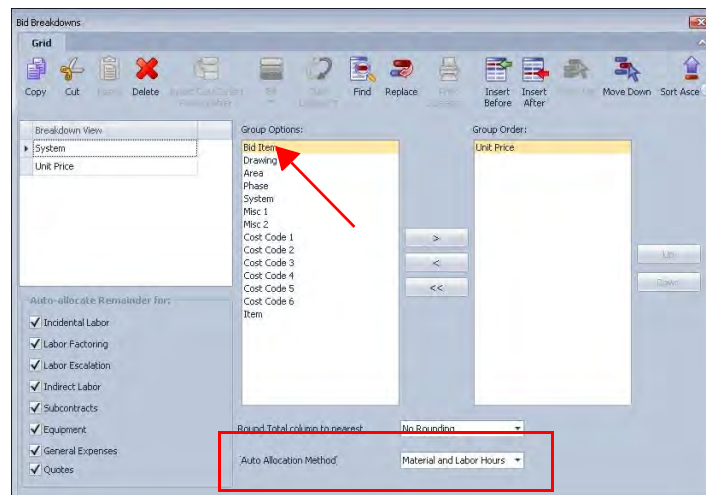
When you click the ellipsis button next to the Specification field, the Copy Specification to Job window opens.

Closeout

Bid Breakdown

The Bid Breakdown module has been enhanced to provide easier review results of complex bid processes with multiple breakouts. These modifications also allow you to determine if there are any items that require further review; for example, items that are either too high or too low.

- **Bid Item**
This release of the Enterprise software includes an option to view the Bid Breakdown by Bid Item.
- **Auto Allocation Method**
This feature allows you to allocate costs by combined Material and Labor Hours, as well as by:
 - Labor Hours *only*
 - Material *only*



Enterprise Estimating/Enterprise Manager

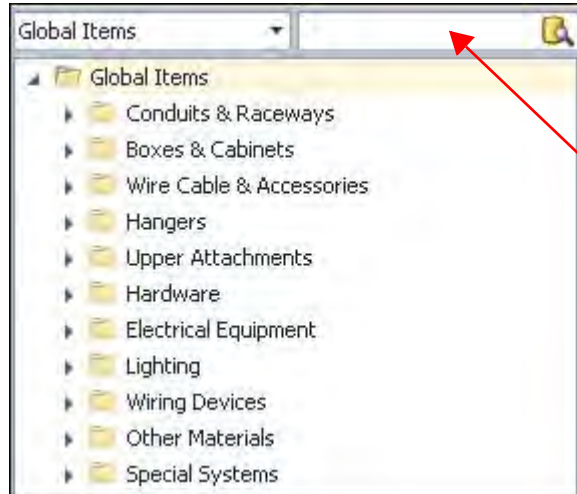
The modifications listed in this section apply to both to the Enterprise Estimating and Enterprise Manager applications.

Field Labels

- The *Sort Code* fields have been renamed to *Cost Code* throughout the application.
- In Takeoff Breakdowns, the *Area* field has been renamed to *Unit*.

Catalog Number Data Searches

The Enterprise software now allows you to search not only by item name, but by catalog number.



If you know the catalog number of the item you need to use, you can now enter it here to search the database.

Auto-Filter Rows

This release of the Enterprise software offers improved auto-filtering on various grids throughout the system.

- When you right-click on the first line in a grid and select **Toggle Filter Row**, a blank line displays.
- You can enter your filtering parameters in this line for any of the columns.
- When you do this, only the data matching your input displays in the column.

	Name	Alarm	Component \$	Labor	Labor Factor Group	Labor Efficiency Factor	Cost Code 1	Cost Code 2
1	A1 - 2x4 Drop-in 3L 277v(2)	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Accessories
2	A - 2x4 Drop-in 4L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Accessories
3	A1 - 2x4 Drop-in 3L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Accessories
4	A2 - 2x4 Drop-in 2L 277v	Off		0.600	Rcwys - Pwr Cbl	1.000	50 Lighting	510 Luminaires & Accessories

- You can enter values in the filter rows for any or all columns, which will filter the data further so see only what you want to.
- You can clear the value in the filter row for any column at any time to cancel the filtering in the column.
- To hide the filter row, right-click in the row and then choose **Toggle Filter Row** from the menu.

Note – You can toggle the row off while you are in filter-mode. You should always check to make sure your grip is not filtered before working in any screen.

In addition we must make sure we cover the scenarios of dealing with filtered grids (for example: removing blank row, etc.)

Enterprise Manager

Modifications and Enhancements listed in this section apply only to the Enterprise Manager application.

Security Manager

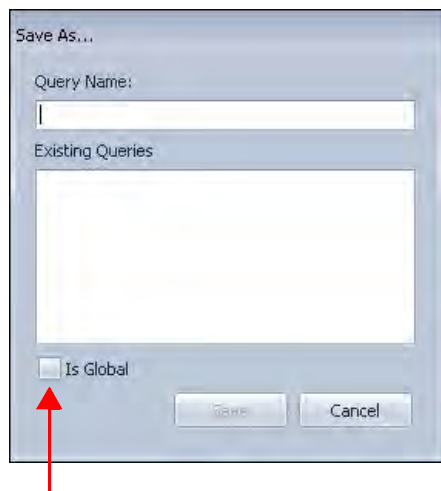
Additional settings are now available in the Enterprise software. These include:

- Restrict individuals from working in specific industries
- Allow specific employees to use *Exclusive Mode* (see [page 7](#))
- Permissions required for Takeoff Attributes access (both Estimates and Change Management modules)

Power Search & Update

In previous releases of the Enterprise software, you could save a save query for use later. In this release, you can also share a saved query with other users. Because the query is already created, other users will be able to use it, which will save time.

When you create a query and save it, you can select the **Is Global** checkbox to share the query with your workgroup.



Note – Trimble recommends that you use consistent naming conventions within your company so others will know the purpose of the query.

Industry Considerations

This release of the Enterprise software includes the ability to add data to a specific industry with like names already available in another industry. For example, if your company is licensed for Electrical, ITS, and Mechanical, and you do not have rights to use Mechanical, you can now add a company that already exists in the Mechanical module. Previously, the software did not allow this.

Manager

The installation routine no longer requires labor decisions when the application is installed on your computer. This decision is now required the first time you open the Enterprise Manager application.

Note – *Update customers will also receive this message the first time the Manager is opened after the release 6.1 is installed. This allows you to subscribe to a labor service through the application, without requiring a reinstall of the Enterprise software.*

Price Updates

TRA-SER® Format

This release of the Enterprise software supports the TRA-SER specification 2 format.