



JIM'S ESTIMATORXPRESS® TOP TIP

June 2010

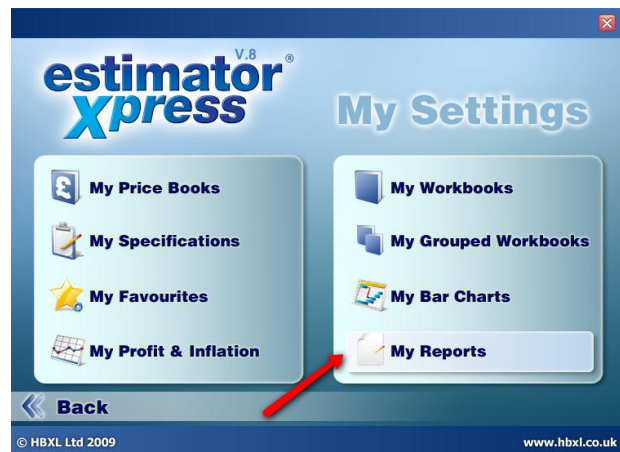
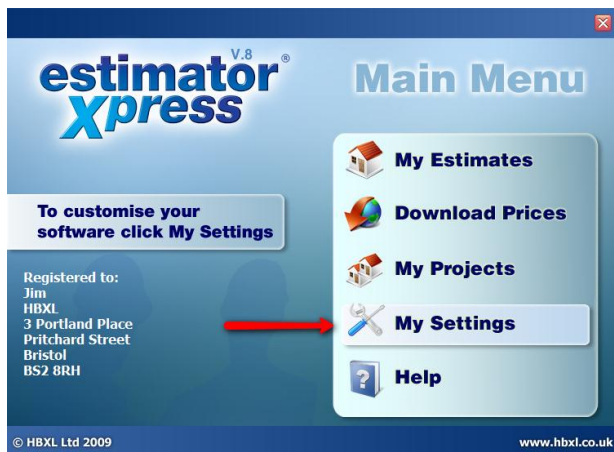
How to create your own reports.

For this month's Top Tip you will need to make sure your EstimatorXpress® is fully up-to-date. You can do this by going into My Estimates and either clicking on Help -> Check for updates (Office 2003, XP and 2000) or by clicking the Office icon (top left corner in Office 2007) -> Check for updates.

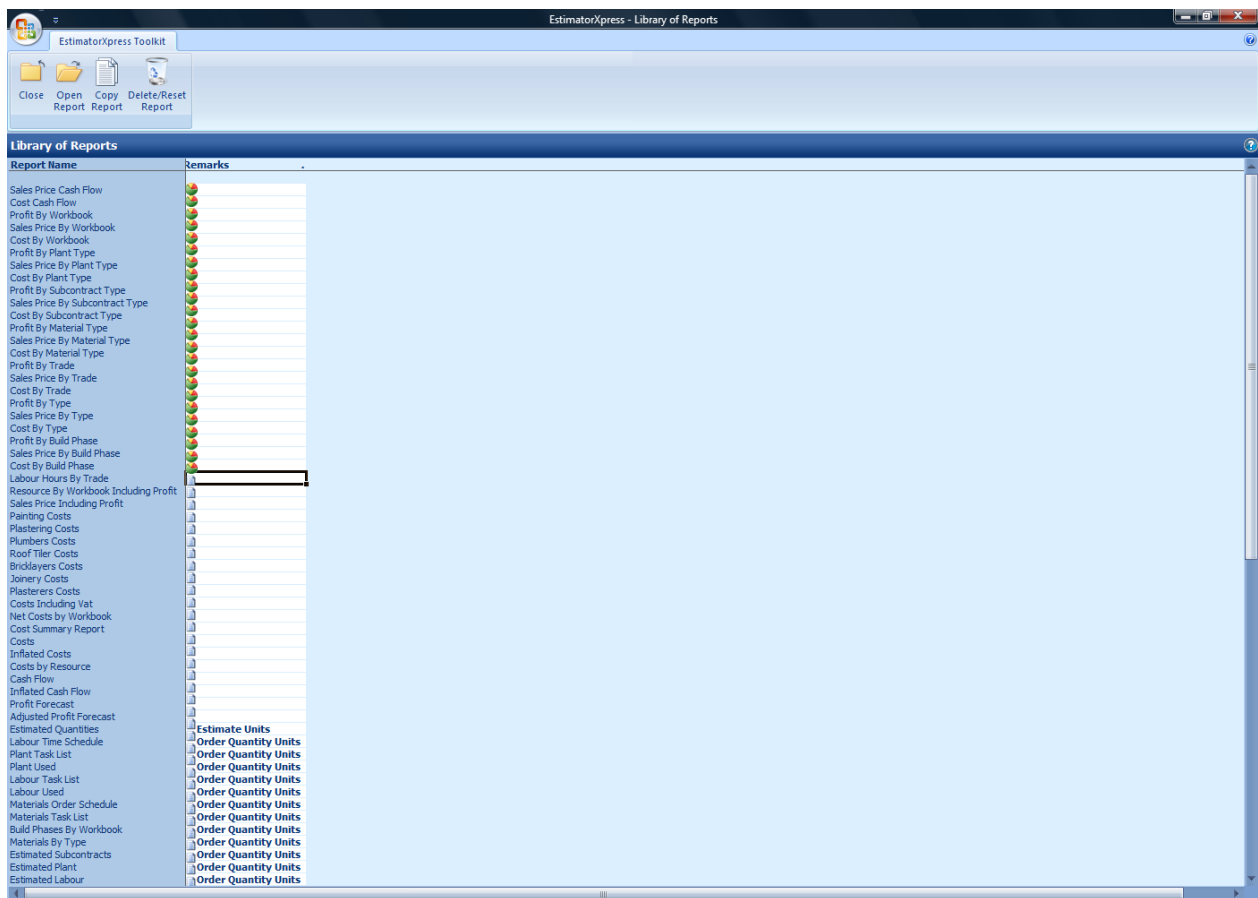
Remember you will need to enter your Builder ID and password to download the update.

This month's Top Tip explains how you can copy and modify an existing report and save it for use in your estimates.

Starting at the main menu click on **My Settings** and then **My Reports**.

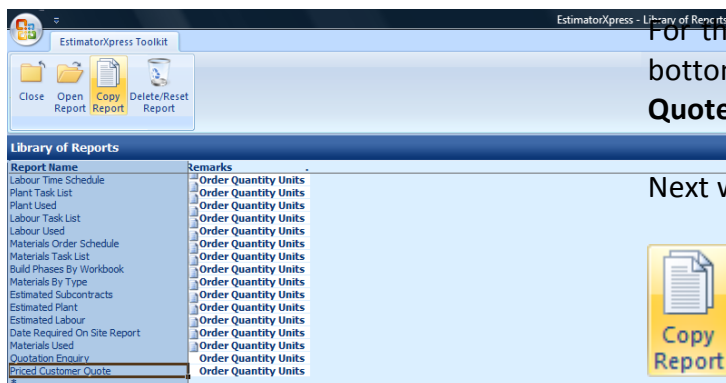


You will then see a list of all the reports already included in EstimatorXpress®. The chart type reports at the top cannot be copied; all the other reports can be copied and modified.



For this example we are going to scroll to the bottom of the list and select **Priced Customer Quote** (single click on the report).

Next we need to click on **Copy Report**.



We will then be prompted to enter a name for our new Report. For this example we have entered 'My Priced Customer Quote' into the **Name** box. After entering the name click **OK**.

EstimatorXpress® will then open the new report. At this point the report is an exact copy of the original, however any changes we make will be saved when we close the report.

EstimatorXpress - My Priced Customer Quote Report

EstimatorXpress Toolkit

Close Report Print Sort by Subtotals Freeze Hide Show Field List

Library of Reports \ My Priced Customer Quote

Product Code (All)
Critical? (All)
Supplier (All)
Job ref (All)
Order By (All)
Location (All)
Element (All)
Reference (All)
Type (All)
Resource (All)
Due date (All)

This is a list of column headings that be dragged and dropped into the report (between currently used column headings).

The report is broken down by Date required, Build Phase, Item used for, Description and Purchase Units.

In other words the report breaks down the information from left to right.

Date required	Build Phase	Item used for	Description	Purchase Units	Quantity required	Sum of Tot Inc Prof(Ex VAT)
27-Sep-06	Structural Openings	Plant for forming opening (1)	Not required	Unit	7.00	£0.00
		Plant for forming opening (2)	Not required	Unit	7.00	£0.00
		Plant to remove spoil from site	Skip 7m3 inc. Land Fill Tax	Each	0.00	£0.00
		Structural Openings Total			14.00	£0.00
27-Sep-06 Total					14.00	£0.00
18-Oct-06	Brickwork Shell	Blocks above dpc less openings	CELCON Block Standard 440 x 215 x 100mm	M2	76.80	£1,195.98
		Brick ties	ANCON Staifix Housing Tie to DD140 Type 4, 200mm HRT4200	TH	0.44	£84.98
		Bricklayer quotation	Bricklaying Quotation	Unit	0.00	£0.00
		Bricks above dpc less openings	LBC 65mm Weathered Honey Buff	EA	4608.00	£2,253.59
		Cavity closure	THERMABATE Cavity Closer T75 White 75mm x 3.0 Metres	EA	6.00	£305.33
		Cavity Insulation	ISOWOOL Cavity Wall System [Pk/14] 455 x 1200mm [7.64m2] 75mm	EA	10.06	£421.85
		Cement above dpc in blockwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	29.95	£136.31
		Cement above dpc in brickwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA	55.30	£251.65
		Door Former	Not required	Unit	1.00	£0.00
		Door frame	Not required	Unit	1.00	£0.00

It is at this point we can make changes to the new report. This is done by dragging and dropping extra column titles into the report from the top left of the sheet. If you want to remove column headings you can drag and drop them from the report back to the list at the top (apart from the Data column).

You can also drag columns left and right within the report to change the order of the report.

EstimatorXpress - My Priced Customer Quote Report

EstimatorXpress Toolkit

Close Report Print Sort by Subtotals Freeze Hide Show Field List

Library of Reports \ My Priced Customer Quote

Product Code (All)
Critical? (All)
Supplier (All)
Job ref (All)
Order By (All)
Location (All)
Element (All)
Reference (All)
Type (All)
Resource (All)
Due date (All)

To add Location to the report left click then drag and drop the column heading releasing it between the Build Phase column and Item used for.

You should see a checkered line between the columns when the column is ready to be dropped in.

Date required	Build Phase	Item used for	Description	Purchase Units
27-Sep-06	Structural Openings	Plant for forming opening (1)	Not required	Unit
		Plant for forming opening (2)	Not required	Unit
		Plant to remove spoil from site	Skip 7m3 inc. Land Fill Tax	Each
		Structural Openings Total		
27-Sep-06 Total				
18-Oct-06	Brickwork Shell	Blocks above dpc less openings	CELCON Block Standard 440 x 215 x 100mm	M2
		Brick ties	ANCON Staifix Housing Tie to DD140 Type 4, 200mm HRT4200	TH
		Bricklayer quotation	Bricklaying Quotation	Unit
		Bricks above dpc less openings	LBC 65mm Weathered Honey Buff	EA
		Cavity closure	THERMABATE Cavity Closer T75 White 75mm x 3.0 Metres	EA
		Cavity Insulation	ISOWOOL Cavity Wall System [Pk/14] 455 x 1200mm [7.64m2] 75mm	EA
		Cement above dpc in blockwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA
		Cement above dpc in brickwork	Blue Circle Mastercrete Original Cement 25kg Bag	EA
		Door Former	Not required	Unit

Once you have finished adding, removing and reordering the columns in the report, all you need to do to save the report is click **Close Report**. You should then be able to use this custom report in all your future estimates.

Got a question?

Call 0845 1234 085 to contact the HBXL Support Team.