



**Estimating Products:
Setting Up
Your
Estimating System**

Version 12

Congratulations

Now that you have obtained the Nation's Leading Estimating Software, we will help you customize it to meet your company's estimating needs.

This document contains instructions on how to modify various parts of the McCormick Estimating System.

McCormick's Technical Support Department is one of the best in the country. If you have any problems modifying your system, or need help with further modifications, please call our Tech Support Department at 800-444-4890 for assistance.



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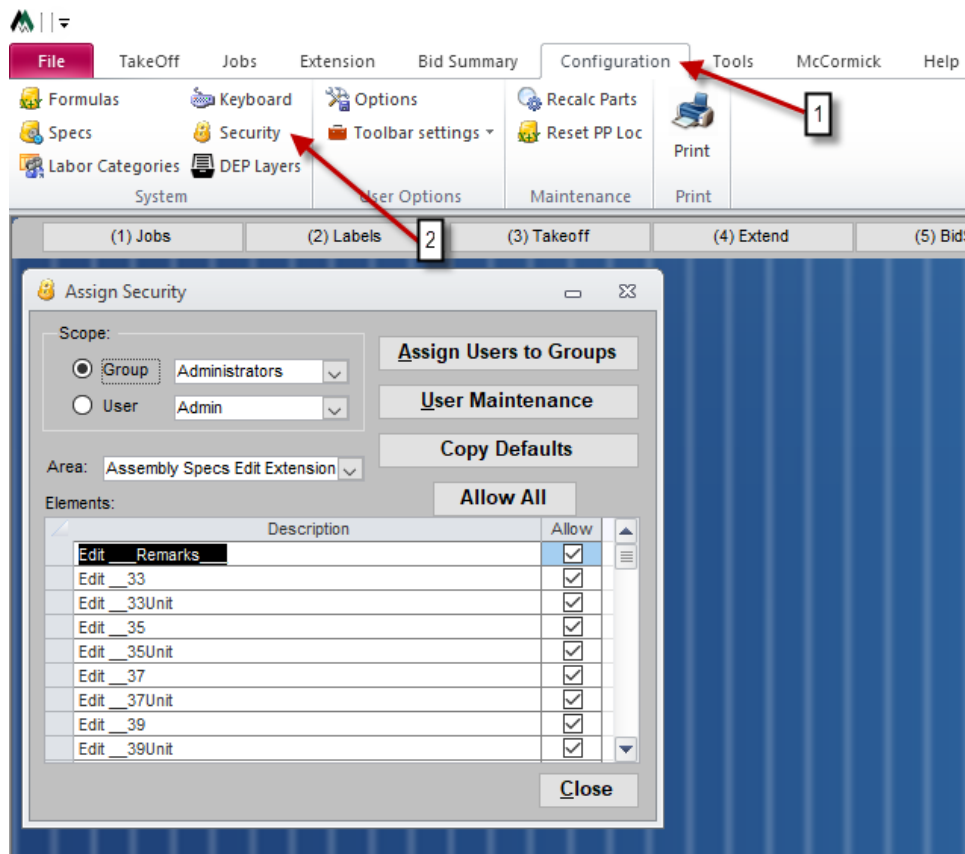
Step # 1: Modify the Sample Job for your Company

Open the “Sample Job” as an Administrator.

Labels – The Labels in the Sample Job is a more complicated set of Labels with multiple Buildings, multiple floors, etc. You may want to modify the Labels in the “Sample Job” to match the jobs you do most often. Then if you want to use these Labels in a Job, just check the “Labels” in “Paste from Job” and Paste them along with the Defaults.

Step # 2: Enter new Users and Change Passwords

Tip: We recommend that you only use the Administration rights for administering your system. All estimators should do their work using Estimators as security, so they don't accidentally change the database while estimating.



To set up new Users and change passwords;

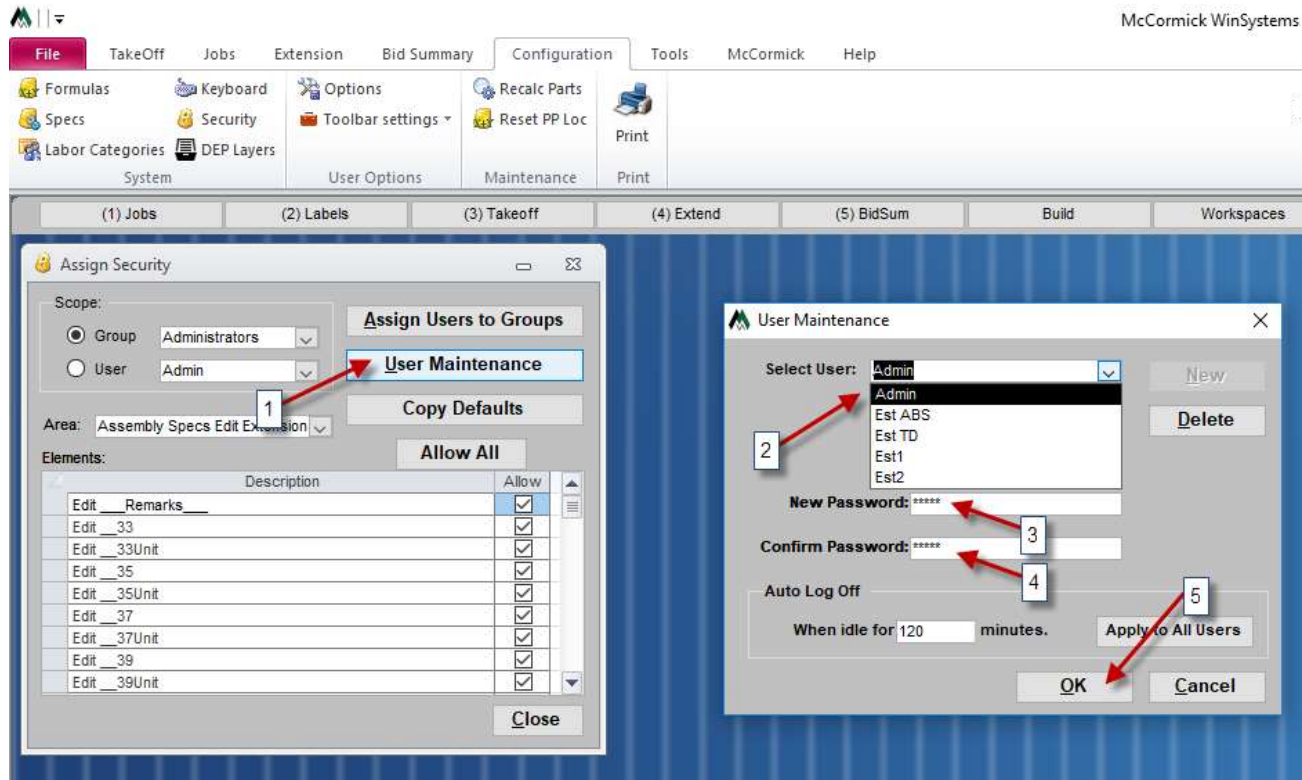
1. **Left Click** on the “Configuration” tab along the top of the ribbon,
2. **Left Click** on the “Security” icon in the ribbon. You must have Administrator rights to edit Security.



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Step # 2: Enter new Users and Change Passwords (Contd.)

To Change the password for an existing User:



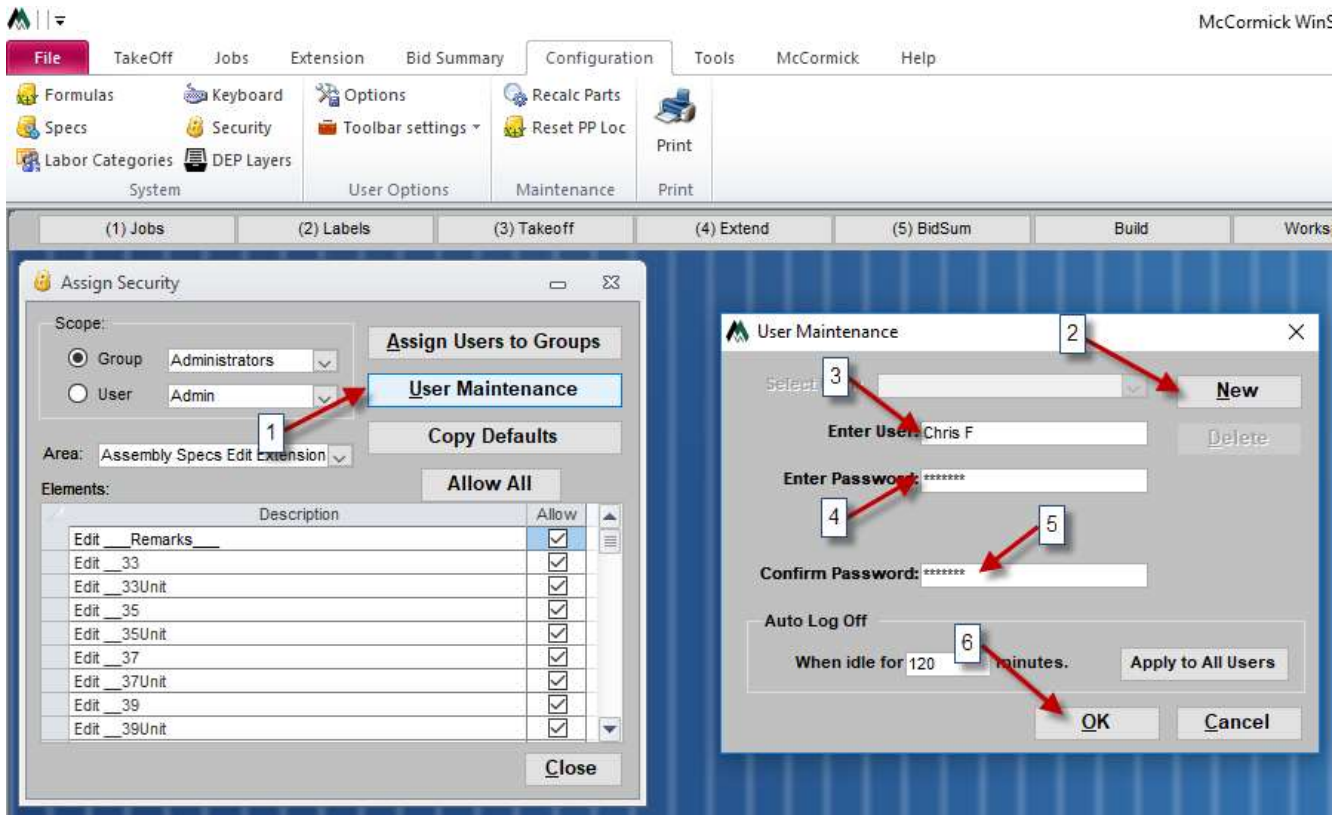
1. In the “Assign Security” screen **Left Click** the “User Maintenance” button and the “User Maintenance” screen will appear.
2. **Left Click** the arrow next to the “Select User” box, and **Left Click** the User’s name.
3. **Type** in the new password in the white box to the right of “New Password”.
4. **Type** it again in the white box to the right of “Confirm Password”. Passwords are case sensitive and will also accept numbers. No spaces or symbols.
5. **Left Click** “OK” when the above is completed correctly.

NOTES:



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Setup # 2: Enter new Users and Change Passwords (Contd.)



To add a new User:

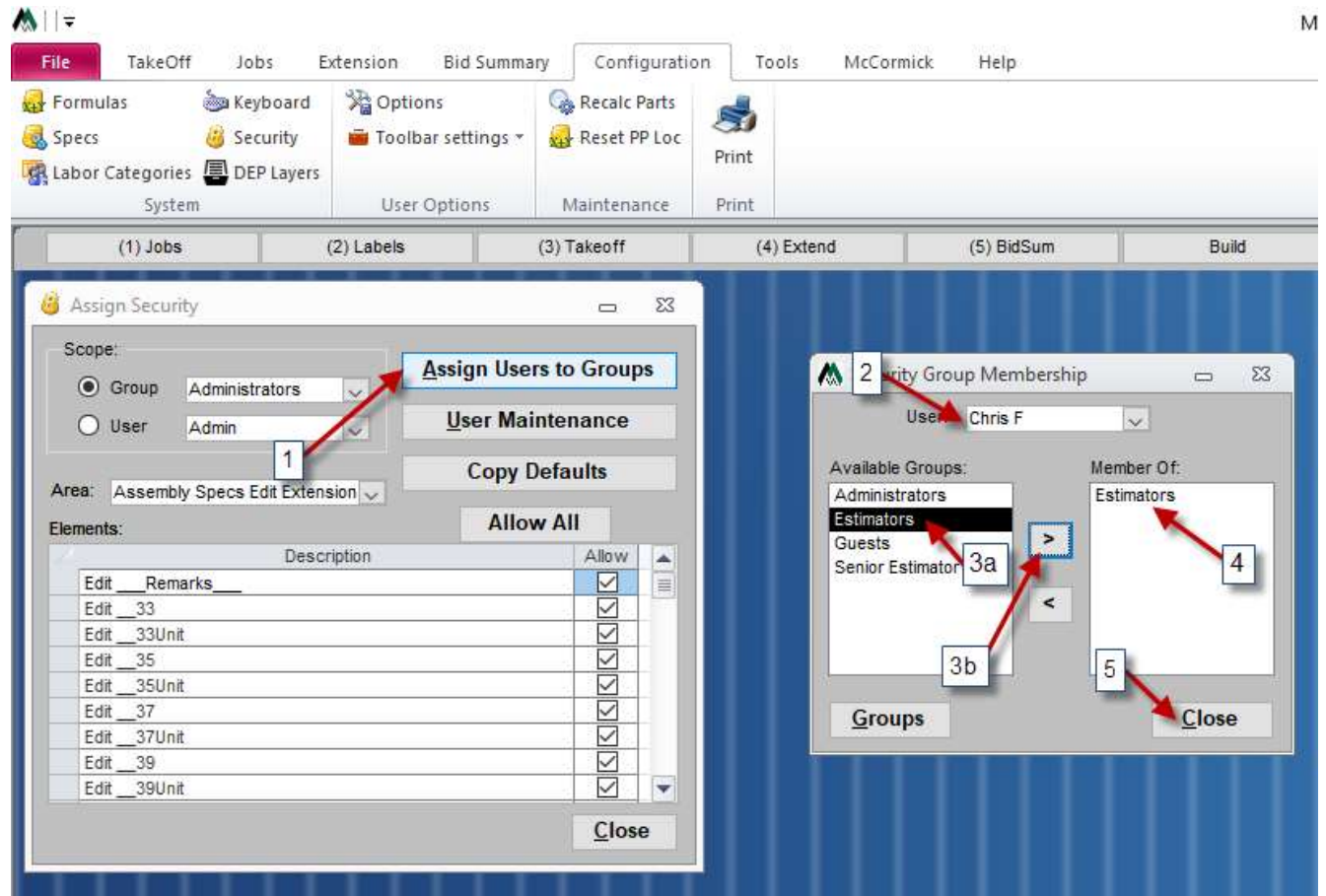
1. In the “Assign Security” screen **Left Click** the “User Maintenance” button and the “User Maintenance” screen will appear.
2. At the “User Maintenance” screen, **Left Click** the “New” button.
3. **Type** the new User name in the white box to the right of “Enter User”. It’s good practice to use the User’s full name, especially if it may be used for reports. Avoid nicknames.
4. **Type** in the new password in the white box to the right of “Enter Password”.
5. **Type** it again in the white box to the right of “Confirm Password”. Passwords are case sensitive.
6. **Left Click** “OK” when the above is completed correctly.

Tip: Create all the Users first, using proper names is usually a good choice, since the following procedures are easier to accomplish using “Pull Downs” to change from User to User.



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Step # 2: Enter new Users and Change Passwords (Contd.)



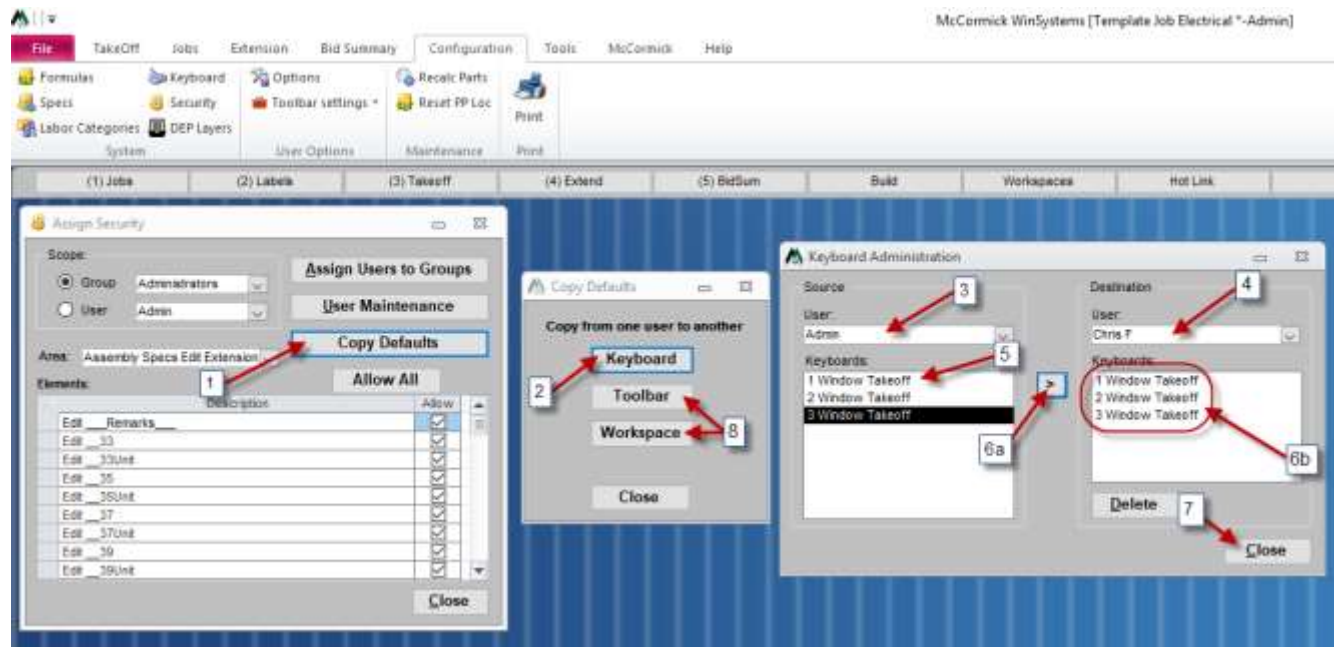
To Assign your new Users to a group:

1. **Left Click** the “Assign Users to Groups” button, and the “Security Group Membership” screen will appear.
2. **Left Click** the pull down arrow for “User:” and **Left Click** the User to be Assigned.
3. In the white box below “Available Groups:”, **Left Click** the group “Estimators” and **Left Click** the arrow (>) in the center pointing right.
4. In the white box below “Member Of:”, **Left Click** (mark) any group that is not “Estimators” and **Left Click** the arrow (<) in the center pointing left. Only “Estimators” should be left in the white box under “Members Of:”. If the User is expected to also modify Extensions, the Group “Senior Estimator” will also need to be added. This group has additional security in conjunction with “Estimator”.
5. When finished, **Left Click** the “Close” button.



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Step # 2: Enter new Users and Change Passwords (Contd.)



Copy Defaults to your new Users:

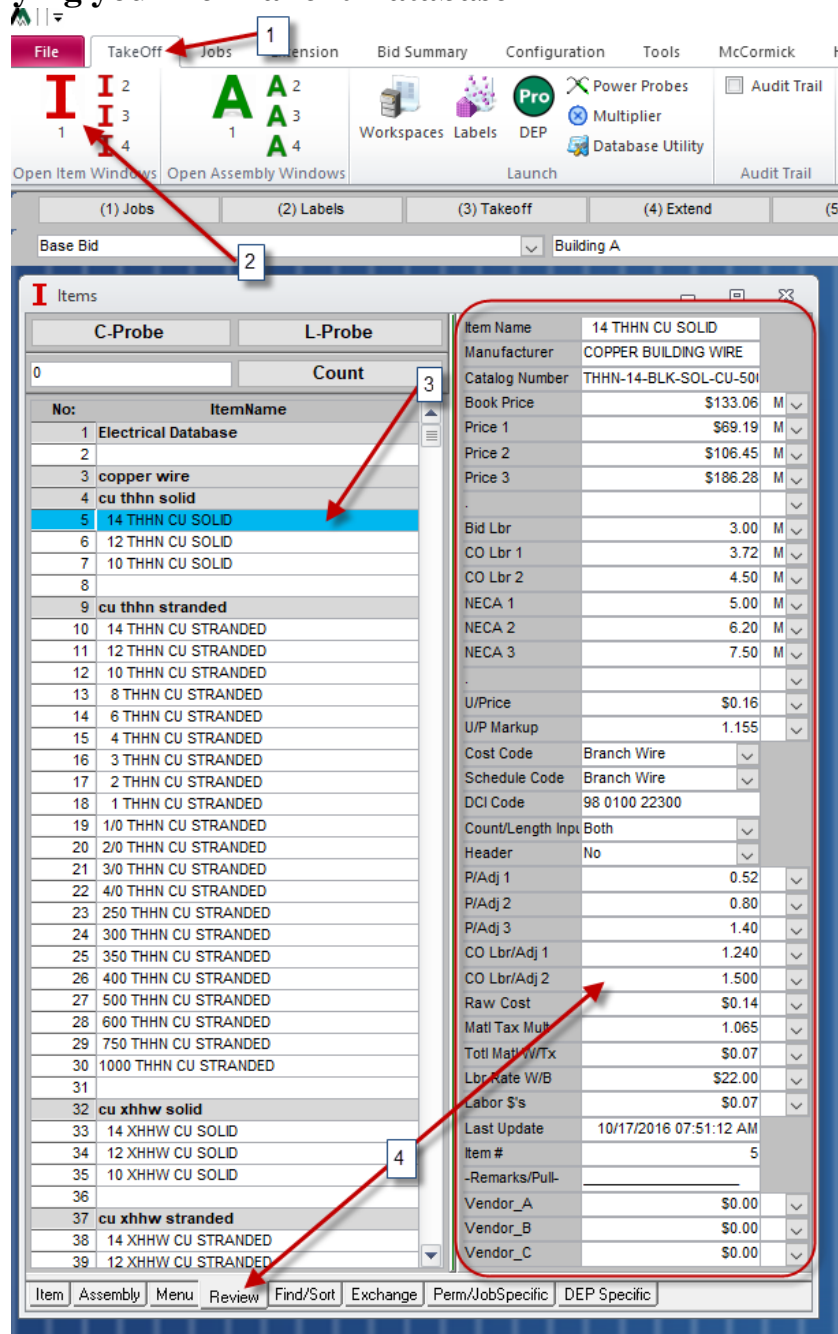
1. **Left Click** the “Copy Defaults” button, and the “Copy Defaults” screen will appear.
2. **Left Click** the “Keyboard” Button and the “Keyboard Administration” screen will appear.
3. In the white box below “Source” and “User” **Select** the User to copy from (Admin).
4. In the white box below “Destination” and “User”, **Left Click** the “User” you want to copy Keyboards to.
5. **Left Click** “1 Window Takeoff”.
6. **Left Click** the arrow (>) in the center pointing right until “1 Window Takeoff”, “2 Window takeoff” etc. are all transferred to the right “Keyboards” window.
7. When finished, **Left Click** the “Close” button.
8. Do the same procedure for “Toolbar” and “Workspace”.

NOTE: All three default areas; “Keyboard”, “Toolbar”, and “Workspace” must be done. You CAN choose which User they are copied from (or any combination of Users).



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Step # 3: Modifying your Permanent Database



1. Left Click on the “Takeoff” tab along the top of the ribbon.
2. Select the “I – 1” icon in the ribbon.
3. Resize the window. Scroll to and Left Click “14 THHN CU SOLID”.
4. If the Review (Right) side of the “Items” window is not open, Left Click the lower center “Rev” or “Review” tab, and the Review screen will appear. This is where you will check your material pricing and labor values.



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Step # 3: Modifying your Permanent Database (Contd.)

The database has a default material price; Book Price, that may be entered or modified manually. This is the price specification that is also modified when using a price updating service.

The subsequent price specifications; Price 1, Price 2 and Price 3, are obtained by the Book Price being multiplied by the various price adjust specifications. The price adjust specifications; P/Adj1, P/Adj2 and P/Adj3, are totally adjustable by the User.

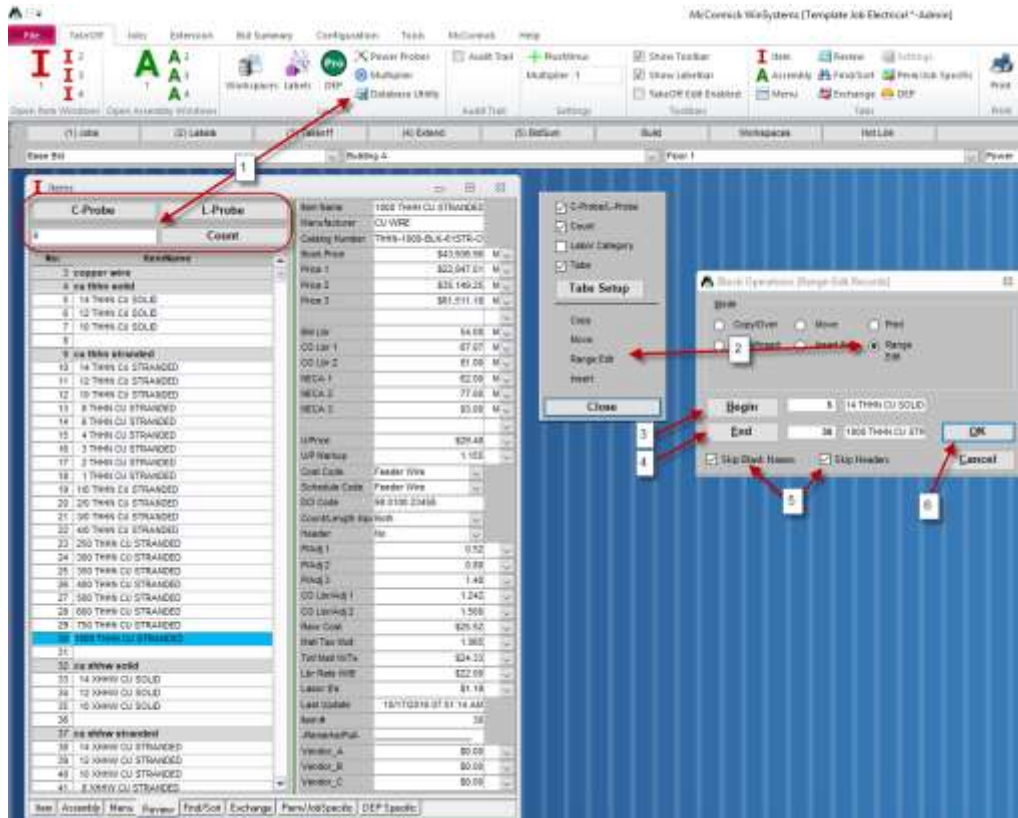
There is also a default labor unit (hours), Bid Labor, that may be entered or modified manually. This unit is based on a national average.

There are additional labor units (hours); CO Lbr1 and CO Lbr 2, that may be adjusted by modifying the various labor adjust specifications; CO Lbr/Adj1 and CO Lbr/Adj 2, accordingly. These labor adjust specifications are totally adjustable by the User and are calculated off Bid Labor.

The various trade labor units (hours); like NECA 1, NECA 2 and NECA 3, may be entered, updated or modified manually. These units can be used for Change Orders or jobs that require a specific labor unit such as some government jobs. The default units are determined by the National Electrical Contractors' Association (NECA) and should **not** be modified unless by using an official source such as a current NECA manual or Trade Service.

NOTES:

Step # 3: Modifying your Permanent Database (Contd.)



To Range Edit either Items or Assemblies:

NOTE: You can only Range Edit the *specifications* in both Items and Assemblies, **not** the By-Products in Assemblies.

1. **Right Click** in the area of the takeoff window containing the white input area and the “C-Probe”, “L-Probe”, and “Count” buttons. The “Popup Controls/Utility Menu” will appear. Or **Left Click** on the “Database Utility” icon in the ribbon and the Block Operations menu (not shown) will appear.
2. **Left Click** on “Range Edit” and the “Block Operations [Range-Edit Records]” screen will appear.
3. **Select** the “Start” of the range to “Edit” either by **Left Clicking** an Item or Assembly and **Left Clicking** the “Begin” button or by directly typing the Item/Assembly Number or Name in the appropriate box.
4. **Select** the “End” of the range to “Edit” either by **Left Clicking** an Item or Assembly and **Left Clicking** the “End” button or by directly typing the Item/Assembly Number or Name in the appropriate box.
5. **Check** either or both of the boxes for “Skip Blank Names” and/or “Skip Headers” if your Range Edit is somewhat large as this can reduce the time it takes to complete and stops it from overwriting the blank lines and/or Headers.



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- When you have carefully selected the range to be edited, **Left Click** the “OK” button

Step # 3: Modifying your Permanent Database (Contd.)

The screenshot shows the 'Items' software interface. On the left, a list of items is displayed with columns for 'No.', 'C.Probe', 'L.Probe', and 'Count'. The item '14 THHN CU SOLID' is selected and highlighted in blue. On the right, a detailed view of this item is shown, including fields for 'Item Name', 'Manufacturer', 'Catalog Number', 'Book Price', 'Price 1', 'Price 2', 'Price 3', 'Bid Lbr', 'CO Lbr 1', 'CO Lbr 2', 'NECA 1', 'NECA 2', 'NECA 3', 'U/Price', 'U/P Markup', 'Cost Code', 'Schedule Code', 'DCI Code', 'Count', 'Header', 'P/Adj 1', 'P/Adj 2', 'P/Adj 3', 'CO Lbr/Adj 1', 'CO Lbr/Adj 2', 'Raw Cost', 'Mat Tax Mult', 'Tot Mat W/Tx', 'Lbr Rate W/B', 'Labor \$/h', 'Last Update', 'Item #', 'Ren', 'Vent', and 'New Price'. The 'P/Adj 1', 'P/Adj 2', and 'P/Adj 3' fields are highlighted in yellow. A red arrow points to the 'Apply' button at the bottom right of the interface.

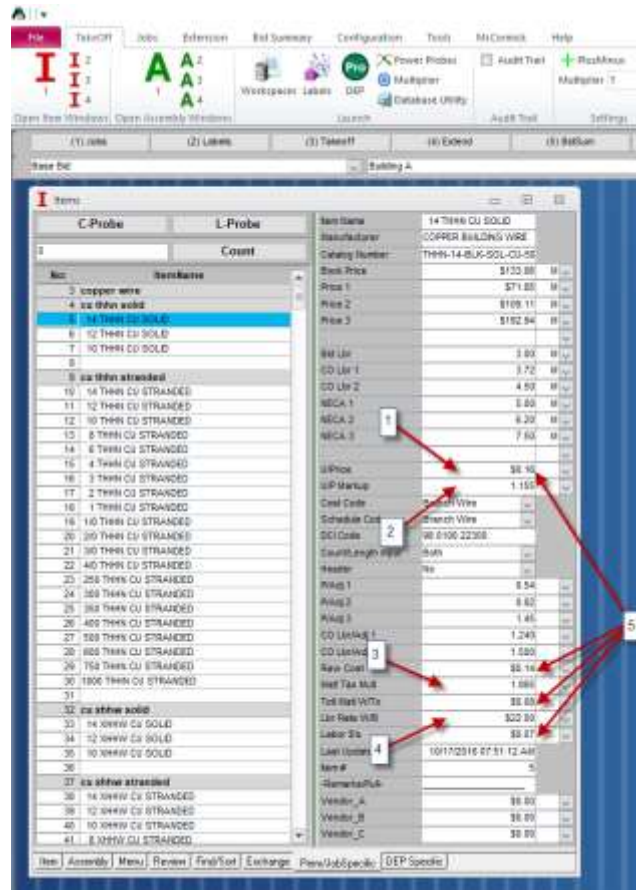
- An “Apply” button will automatically appear at the bottom of the Review screen.
- Modify** the Items/Assemblies to be modified by either changing the number, description, or the unit (the pull down arrows on the right show “E”, “C”, “M” etc.). Note that the affected fields change to a yellow color. A Multiplier will work for changing an input price or labor using the format “*.95” or whatever multiplier is needed.
- When everything is correct, **Left Click** the “Apply” button.

NOTES:



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Step # 3: Modifying your Permanent Database (Contd.)



Modifying Unit Pricing in Items:

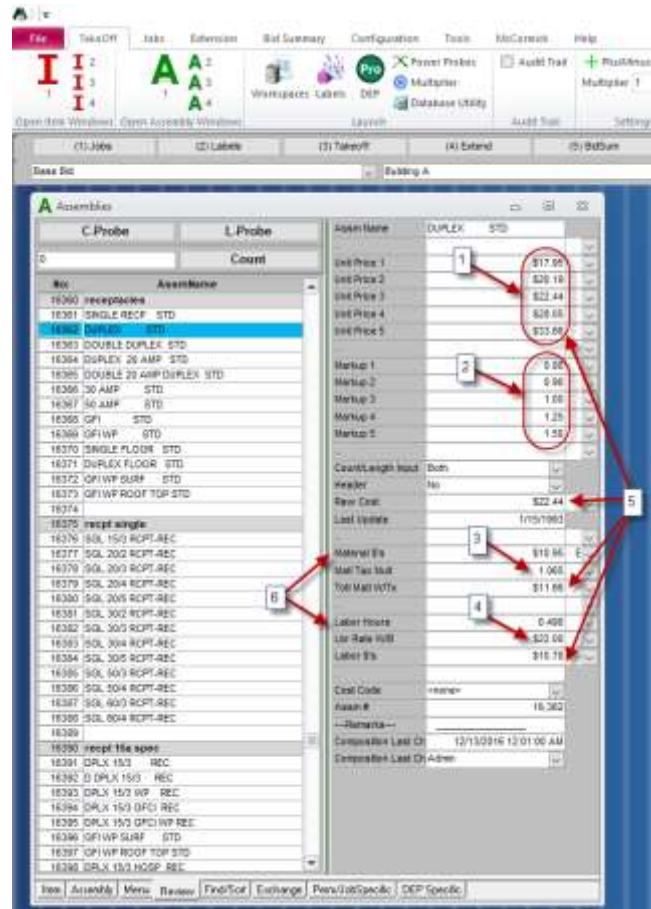
Tip: If your jobs require a price per each or per foot, you will need Unit Pricing. Unit Pricing doesn't carry over to Bid Summary, as the result is a complete number. There are Extension reports that will calculate your Unit Price results. Unit Pricing should be setup based on the company's needs and left alone except for occasional adjustments. It is **NOT** intended as a "per job" function.

1. This is the **final** Unit Price (U/Price). As already stated, it is an all-inclusive quantity as a result of calculating the rest of the steps below.
2. **Set** the "U/P Markup" (this should include Overhead and Profit or Profit only if the Overhead is included in the Labor Rate with Burden).
3. **Set** the "Matl Tax Mult" (this would include the sales, use, etc. taxes)
4. The unit price for an Item should include the "Lbr Rate W/B". This will include a set Labor Rate **and** Burden (if any) in Dollars per Hour.



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- The “U/Price” equals the sum of all these parts and is based on formulas using preset material dollars and labor hours (by default Price 1 and Bid Labor). McCormick Systems Technical Support can change them if you want different results.



Modifying Unit Pricing in Assemblies:

Tip: If your jobs require a price per each or per foot, you will need Unit Pricing. Unit Pricing doesn't carry over to Bid Summary, as the result is a complete number. There are Extension reports that will calculate your Unit Price results. Unit Pricing should be setup based on the company's needs and left alone except for occasional adjustments. It is **NOT** intended as a “per job” function.

- Unlike Items, Assemblies have five (5) levels of Unit Pricing. This is the **final** Unit Price (U/Price). As already stated, it is an all-inclusive quantity as a result of calculating the rest of the steps below.
- Set the “U/P Markup 1, 2, 3, 4, 5” (this should include Overhead and Profit or Profit only if the Overhead is included in the Labor Rate with Burden).
- Set the “Matl Tax Mult” (this would include the sales, use, etc. taxes)



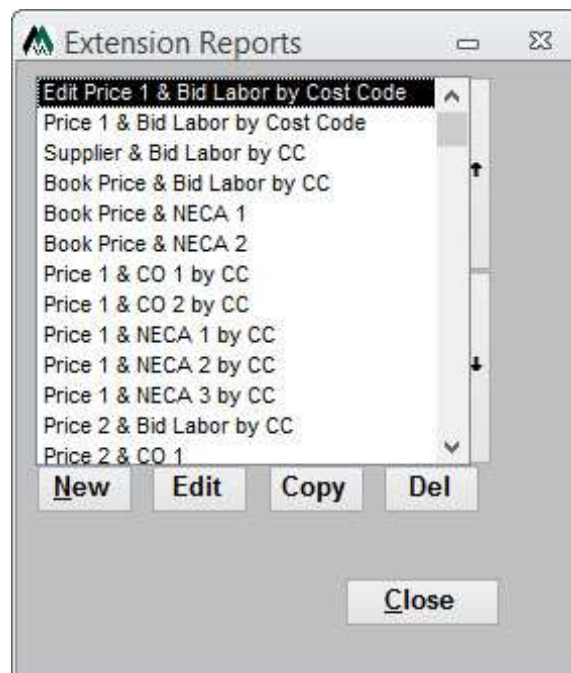
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4. The unit price for an Assembly should include the “Lbr Rate W/B”. This will include a set Labor Rate **and** Burden (if any) in Dollars per Hour.
5. The “U/Price” equals the sum of all these parts and is based on formulas using preset material dollars and labor hours (by default Price 1 and Bid Labor in the Items). McCormick Systems Technical Support can change them if you want different results.

Step # 3: Modifying your Permanent Database (Contd.)

6. What makes Unit Pricing in Assemblies a bit different is that the calculations are based on an aggregate of all the items that make up that Assembly and their respective quantities, i.e. it might include one (1) switch and ten (10) feet of Branch.

Step # 4 – Modifying the Extension Report for your Company



A number of Extension Reports are furnished with your system and are pasted to new jobs as one of the defaults from the Sample Job or other template job. If you need a modified Extension Report, modifying Extension Reports is taught in our Advanced Training class or call our Technical Support Department for assistance.

Step # 5 – Modify the Bid Summary for your Company



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Labor

Open the “Sample Job” and **Left Click** on the “Bid Summary” tab along the top of the ribbon and the “Summary” icon in the ribbon. The Bid Summary window will appear (covered in Tutorial A).



1. **Left Click** the “Labor” tab at the lower left of the Top Sheet and the Labor window will appear.

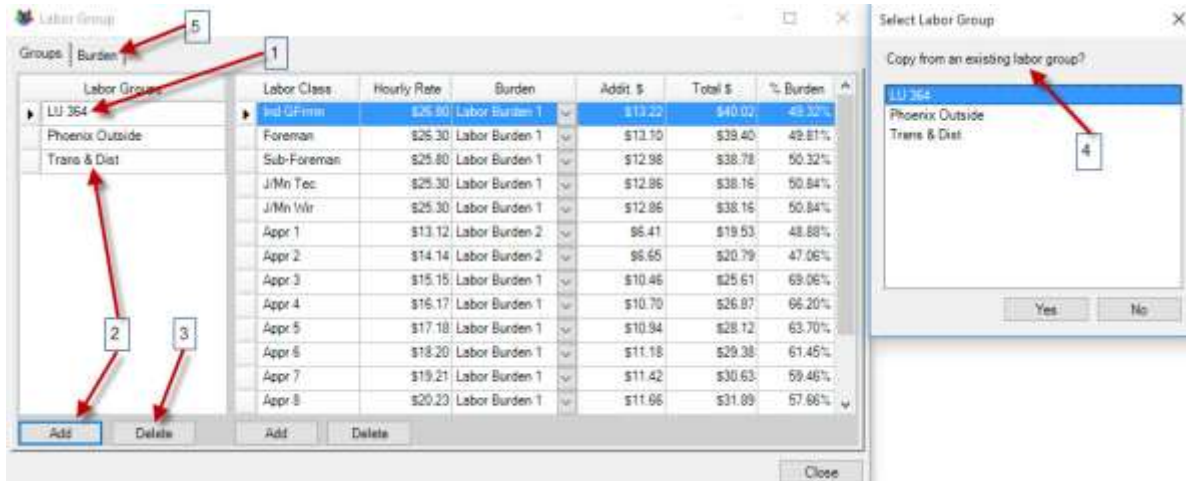
Tip: You can tell which form you are in by the Tab that is on “top” and highlighted.

NOTE: *While the following will be similar for all products, the actual Groups **will** vary depending on the Estimating Product you have.*

2. In the left middle of the Labor window **Left Click** the “Groups” button and the Labor Groups window will appear. This is where you can create Labor Groups, modify the Labor Class, Hourly Rate and Burden.



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1. **Modify** the “Labor Group” in the upper left corner named “Phoenix Inside” to a Labor Group that you would use, i.e., “Local 123” or “Rex Electric”, etc.
2. **Create** any other Labor Groups that you may need by editing the name field and subsequent table or clicking on the Add button.
3. When you delete any groups, you will be asked to confirm.
4. When you enter a new Labor Group you will be prompted if you want to copy from an existing Labor Group. This will help save time having to create an entire group from scratch.
5. **Left Click** the “Burden” Tab and the Labor Burden window appears.

Step # 5 – Modify the Bid Summary for your Company (Contd.)



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1. In the upper right corner of the Labor Burden window you may select your different “Labor Groups”.
2. On the right side of this window is a list of Labor Burdens with a maximum of 40 different Burdens. **Modify** the burden Name and \$ or % column as needed for the Labor Category shown. Select Dollar or Percent for the type of entry made.

Tip: If you use a dollar per hour figure for overhead, this would be where you could enter it.

3. On the remainder of this window, the Labor Category type is listed with a Name, “Total \$”, “Total %”, and columns with boxes named for each labor burden listed. As the necessary boxes are chosen, the “Total \$” and “Total %” will reflect the appropriate burdens. Modify the Labor Category Name by using “Labor Burden 1” as shown; naming a level such as Foreman, Electrician, etc.; or even a particular worker, i.e., “Jack Johnson”.
4. When you are done with the Labor Burden types and Labor Burden Categories, **Left Click** the “Groups” Tab.

Step # 5 – Modify the Bid Summary for your Company (Contd.)



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Labor Group	Labor Class	Hourly Rate	Burden	Appt \$	Total \$	% Burden
Phoenix Inside	Apprentice	\$17.85	Labor Burden 1	\$13.72	\$40.02	49.51%
Phoenix Outside	Foreman	\$25.30	Labor Burden 1	\$13.70	\$39.40	49.81%
Trans & Dist	Sub-Foreman	\$25.00	Labor Burden 1	\$12.90	\$38.78	50.32%
	J.W. Tac	\$25.30	Labor Burden 1	\$12.90	\$38.16	50.84%
	J.W. Wlr	\$25.30	Labor Burden 1	\$12.90	\$38.16	50.84%
	Appr 1	\$13.12	Labor Burden 2	\$6.61	\$19.53	48.88%
	Appr 2	\$14.14	Labor Burden 2	\$6.68	\$20.79	47.06%
	Appr 3	\$15.15	Labor Burden 1	\$10.45	\$25.81	69.06%
	Appr 4	\$16.17	Labor Burden 1	\$10.70	\$26.67	66.20%
	Appr 5	\$17.18	Labor Burden 1	\$10.94	\$28.12	63.70%
	Appr 6	\$18.20	Labor Burden 1	\$11.78	\$29.38	61.45%
	Appr 7	\$19.21	Labor Burden 1	\$11.42	\$30.63	59.46%
	Appr 8	\$20.23	Labor Burden 1	\$11.95	\$31.88	57.66%
	Appr 9	\$21.24	Labor Burden 1	\$11.90	\$33.14	56.04%

This takes you back to the Labor Groups Screen where you can Modify and Add to the “Labor Class” and “Hourly Rate”. This is where you will also select the type of Labor Category.

1. **Left Click** the first “Labor Group” (Phoenix Inside or whatever you changed it to LU 364).
2. **Modify** the “Labor Class” column by typing over what’s there or adding new classes to match your company needs.
3. **Modify** the Hourly Rate for each Labor Class to match your company needs.
4. **Left Click** the white area (or existing text) in the “Burden” column for the selected “Labor Class”, **Left Click** the Pull Down Arrow, and **Select** the proper Burden from the list for each “Labor Class”.
5. This area cannot be edited directly. These are the results from doing the Burden.
6. **Left Click** the “Close” button to return to the Labor tab in Bid Summary.
7. **Left Click** the “Add” button to add Labor Groups.
8. **Left Click** the “Delete” button to delete Labor Groups.
9. **Left Click** the “Add” button to add Labor Classes.
10. **Left Click** the “Delete” button to delete Labor Classes.



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Step # 5 – Modify the Bid Summary for your Company (Contd.)

Other Costs

Other Costs include the tabs Quotes, SubCont (Sub Contractors), DJE (Direct Job Expense), and EqRental (Equipment Rental). These are costs over and above takeoff that have a direct effect on the final price of the job.



1. **Choose** an “Other Cost” category. It is recommended that when doing a Bid Summary, the User choose every category, left to right, to make sure there is nothing that needs to be added to that category. If it’s forgotten, that’s money left on the table.
2. The “**R**” column can be thought of as “Required”, “Reminder” or even “Red” as that’s what a check here will do to the Top Sheet. It will show a check in the “**R**” column on the Top Sheet **AND** put a red border around the upper left part of the window and highlight “Sell Price” in red as well. The checks will **NOT** follow through to the remaining Bid Summaries and must be checked in each one as they apply. If an Other Cost is required on every Job or most Jobs these reminders could be checked in the Template Job and pasted to each new Job.
3. This is a list of sub-categories within the main category being worked on. This list can be setup and modified in any template job. For example, the above list was pasted from the Template Job by choosing Bid Summary.
4. The “**T**” column is used to identify those sub-categories that require individual taxes. A check in this column will transfer the dollar amount for this sub-category to the Tax table. The taxable amounts are totaled up when transferred. The “**T**” column checks **WILL** follow through to each Bid Summary and **must** remained checked for any taxes to be carried over to the Tax table. If some Other Costs are always taxed, the Tax box could be pre-checked in the Template Job and pasted to the new Job.



Step # 5 – Modify the Bid Summary for your Company (Contd.)

5. The **data is entered** into the “Unit” and “Mult” columns. This example is a *Unit Price* quote. The “Unit” shows an individual cost and the “Mult” shows the number of “Units”. The “Dollar” is then calculated automatically. An example of using the multiplier would be using it for footage when entering Saw cutting or trenching.
6. This example is a *Lump Sum* quote. The “Unit” shows the total cost and the “Mult” remains at “1”, so the “Dollar” is calculated as the same total cost.
7. This is the total dollar amount of all the sub-categories calculated in this table.

NOTES:

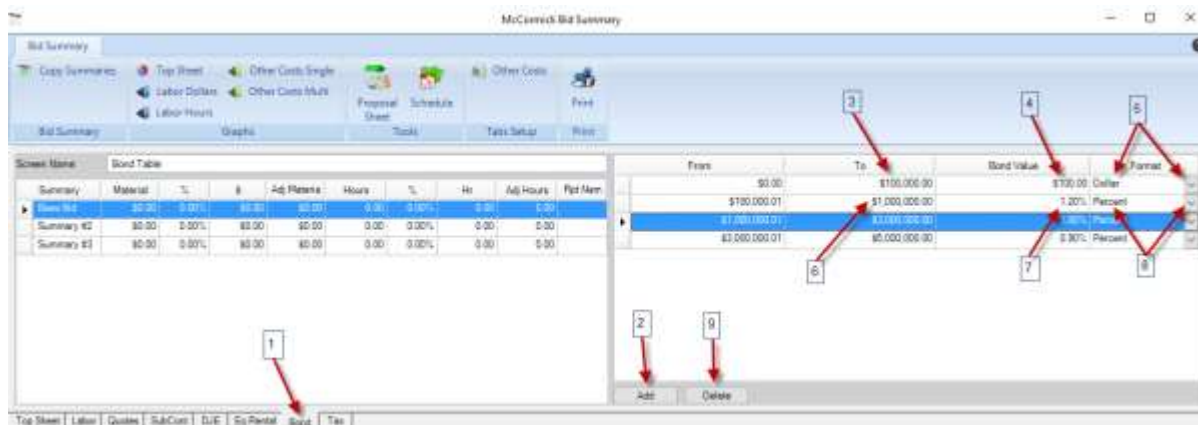


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Step # 5 – Modify the Bid Summary for your Company (Contd.)

Bond

If you do bonding please use the following steps to setup your Bond Table.



1. **Left Click** the “Bond” tab at the lower right of the “Bid Summary” screen and the “Bond Table” will appear.

Tip: The “From” column automatically calculates the “From” amount based on the preceding “To” amount, therefore typing in the “From” column of the “Bond Table” is not needed

2. **Left Click** the **Add** button.
3. In the top row of the “To” column, **Enter** the first bonding increment, i.e., “100,000”, and **Hit** the “Enter” key.
4. **Enter** “100” in the bond value column, and **hit** the enter key. Notice that “\$100.00” appears in the bond value column if the format is set to dollars.
5. If Dollars are not selected, select dollars using the pull down arrow. Notice that \$0.00 appears in the “From” column and “\$100,000.00” appears in the “To” column. **Left Click** the **Add** button (2).
6. **Enter** 1000000 in the “To” column of the second row.
7. **Enter** 1.2 in the Bond Value column.
8. **Select** Percent using the pull down arrow.
9. If a Bond value needs to be deleted, select the gray box to the left of the row and select the delete button.

Continue as shown above for any additional increments.

If the Bond table is being used by the Company, it may be setup in the Template Job and Paste with the Bid Summary to any new Job.



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Congratulations! This covers some of the basic customized setups you can perform. For even more options, please attend the Standard or Advanced Training class or give the McCormick Technical Support a call.

NOTES: