Estimating Reports: Easy Tips to Create a Great Report

Presented by Matt Carr
See how reporting in Timberline Estimating can be modified so you get professional looking reports.

The four most important things to remember in estimating are…

- Right Click…
- How will the estimate be sorted…
- How wide do I want the estimate…
- How much detail do I want to see…
With Reports, you use 3 of the 4 previously mentioned points.

- You are always concerned how the estimate is “sorted”.
- You are always concerned how “wide” the report is.
- You are always concerned how “deep” the report is.
- If you think of reports in those terms you may find it easier to make the reports you want.
Estimating offers many specific reports

- However all reports have several things in common.
- Get to know the “Repot Options” dialog box.
- All controls for the selected report are here.
Most options are in the "Report Options..." section.
The Report Options… button controls most options

- There are 5 tabs here
  - Report Options
  - Sort
  - Range
  - Font/Layout
  - Page Setup
The Report Options tab

- This box varies depending upon which report you are in.

- This controls how the report looks.
  - In some reports this determines the level of detail for the **width** and **depth**

- This controls sections to added for certain reports.
The Sort tab

- There is a top and right section
  - This controls the sorting of the report
  - It works exactly like the Spreadsheet layout tab
  - Summary level controls the depth of the report

- There is a bottom left section and is as important as the previous two
  - Summary level controls the depth of the report
  - Pages are controlled by the next button down
  - Bottom left button brings over the summary levels from the spreadsheet
The Range tab

- Allows you to choose a selected range of the report
  - For example you may only want a report on the concrete takeoff

- The range is **always based upon the top sort** of the sort tab

- You can have multiple ranges.
  - Provided they are in ascending order
The Font/Layout tab

- My advice is to never, ever go into this tab and make changes.
  - That is unless you wish to waste a morning, and still not get it right.

- Leave this section to the experts at Timberline who work with fonts and layouts day in and day out.

- If you ask me any questions on this tab, I will disavow any knowledge of even bringing up this tab.
The Page Setup tab

- Controls size of the page and how it looks
  - Paper size
  - Portrait or Landscape
  - Margins
  - # of Copies
  - Most important... fit to width feature
Estimating has a number of fixed reports

- Fixed reports
  - Designed for a specific purpose or type of information to show
  - The user usually has few options to control the report design
  - The options are generally limited to width, depth and sort control
  - You can set your preferences and save your design changes per report type.
The Pre-designed reports are

- For Standard & Extended
  - Takeoff Audit…
  - Spreadsheet…
  - Standard Estimate…
  - Estimate Details…
  - Takeoff Unit Costs…
  - Unit Price Review…
  - Bill of Materials
  - Field Report…
  - Bill of Quantities…
  - Unit Price Analysis…

- For Extended only
  - Crew Report…
  - Crew Analysis Report…
  - Comparison Report…
  - Variance Report…
  - Bid Grid Report
Then we have… Free Design Reports

- Allows the user to design and setup a report the way they want.

- This type of report requires decent knowledge of
  - Spreadsheet Setup
  - Use of WBS Codes and Spreadsheet Sort Sequences
  - Allocation
  - Report Setup
We are going to design a report

- Free form report design is as follows.
  - Organize the spreadsheet in the way you wish to see on a report
  - Go to Spreadsheet reports then to Report Options
  - Click the lower left box “Prefill from Spreadsheet”
  - In the Report Options dialog box spec out the rest of the report options

- The things to remember are…
  - Free form report design always starts at the spreadsheet
Design a for pricing review

1st Organize the spreadsheet the way you want to see it.

2nd Go to the spreadsheet report dialog box and set up
   - Page Setup Landscape and fit to 1 page wide
   - Report Options Choose the options here you want
   - Sort Set the summary level you wish to have

3rd Once the report is spec’d out. Save it.
To Save a Report for future use

- Click “Save Layout” in the bottom right of the reports options dialog box.
- Give the report a name.
- Click the “Manage Layouts” to rename or delete reports.
- Estimating remembers the last report you used, and is the default report the next time you choose to run a report.
The Header, Footer & Signature Block

- Here you enter information into the header, footer and a signature block.

- The Header – Footer – Signature Block each have their own layout with columns and rows, where you can add fields, graphics or text.

- Go to the space you want to add information and place it there.
More on Header, Footer & Signature Block

- This is where you can add your company logo
  - Be sure the logo is sized correctly

- You do not need to put in your company name here.
  - I often see this, people wanting to add their company name here
  - Go to Database Settings – Company – Your Company Info and add your company name here
  - This requires an address book, even if this is your only need for one.

- Be sure to save the information once you complete these tasks.
Another Report… for Estimate Totals

- We need a report to hand to the owner with estimate totals by Bid Item.

- Once again this starts with the spreadsheet.
  - We need the Grand Total Amount with addons allocated.
  - Notes per Bid Item.

- Then go and finish the specifications of the report.
<table>
<thead>
<tr>
<th>Description</th>
<th>Notes</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Bid</td>
<td>this is the base bid for the project that will include the entire 16 divisions.</td>
<td>137,651</td>
</tr>
<tr>
<td>Alternate for garage addition</td>
<td>this is the bid for addition to the base bid proposal, this includes a 2' stretching of the overall project in in both the length and the width of the building (adding approx. 100sqft)</td>
<td>5,463</td>
</tr>
<tr>
<td>Alternate to finish bonus room over garage</td>
<td></td>
<td>2,602</td>
</tr>
<tr>
<td>Alternate for driveway extension and utilities</td>
<td>with the drive extension this adds 15 feet to the length of the drive along with the additional utilities to get to the new garage...</td>
<td>11,759</td>
</tr>
</tbody>
</table>
This can be combined with a signature block

- If you have additional terms or conditions you can put them into your “Totals Notes”.
- Then click to have the “Totals Notes” print on the totals page.
Reports can be exported to PDF or Excel

- Click on the Export box on the right.
  - Pick the file format you want.
  - Export the document.

- Excel files are now formatted with proper column widths.
  - This has been corrected for some time now.
The report Cover Page

- You can modify what information on the cover page appears on the report.

- Click on the “Setup” button to the right of the cover page checkbox.

- Here you can click on and off the fields as you like.

- Information only appears on the report if it is filled in on the cover page.

- If there is no information in the field, it will not show up on the cover page.
To summarize…

- Learn the Report Options dialog box and where things are controlled.

- Think in terms of…
  - How deep
  - How wide
  - How sorted
Your Aktion Contacts

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Thank you for attending.

Presented by Matt Carr