



2-Day Piping Classroom Agenda

Day 1

8:00 am – Sign In & Introductions

8:30 am – Step #1 (Overview)

- The overview is an introduction to the piping program. You will learn the structure of the program, and how the information flows throughout the program.
 - Skills learned are;
 - *Basic navigation through the program.*

9:00am – Review implementation steps.

- Learn how to;
 - Set up Labor Factors.
 - Set up Material Multipliers.

10:00 am – Step #2 (Job Setup)

- Learn how to create a new job, and set up the job with;
 - Specs
 - Skills learned are;
 - *Copying Specs*
 - *Editing Specs*
 - Assemblies
 - Skills learned are;
 - *Copying Assemblies*
 - Job Items
 - Skills learned are;
 - *Creating Job Items*
 - *Copying Job Items*
 - *Editing Job Items*

11:00 am – Step #3 (Basic Takeoff)

- Learn how to create zones.
- Learn how to do a basic material takeoff utilizing;
 - Specs
 - Assemblies

- Job Items
 - Skills learned are;
 - *Navigation of the takeoff window.*
 - *Generate a material list in the audit trail.*
 - *Generate Equipment, and Fixture counts utilizing Job Items.*
 - *Takeoff Assemblies.*

12:00 pm – Lunch

1:00 pm – Step #3 Continued (Advanced Takeoff)

- Learn advanced features in zone takeoff
 - Skills learned are;
 - *Edit audit trail items by changing sizes, quantities, and replacing items.*
 - *Tag takeoff items with Systems, Phases, and areas.*

2:00 pm – Step #4 (Onscreen Takeoff)

- Learn how to utilize the basic takeoff skills gained in Step #3 to generate a takeoff with Quotesoft's Onscreen Takeoff Tool.
 - Skills learned are;
 - *Manage electronic documents.*
 - *Generate a material take-off.*
 - *Generate Equipment, and Fixture counts.*

4:00 pm – Step #4 Continued (Advanced Onscreen Takeoff)

- Learn how to utilize more tools in onscreen.
 - Auto-Pipe
 - Layers
 - Quicktotal Reports

5:00 pm – End of Day 1

Day 2

8:00 am – Review from Day 1, and Q&A session.

9:00 am – Step #5 (Calculations)

- Learn how to;
 - Run calculations based on the zone takeoff(s).
 - Read the material, and labor summaries.
 - Understand Exceptions, and correct exceptions.
 - Skills learned are;
 - *Calculate the entire job.*
 - *Calculate selected zones.*
 - *Calculate by a pattern.*

10:00 am – Step #6 (Quotes)

- Learn how to manage material lists for pricing options.
 - Skills learned are;
 - *Input quoted items prices.*
 - *Create a complete material list to send out to be quote by a supplier.*
 - *Understand the Excel import, and export tool.*
 - *Understand Bid Price, and Buy Price tool.*

11:00 am – Step #7 (Excel)

- This is an introduction to the QuoteExpress Excel Templates.
- Learn how to run excel reports.
- Learn all the options in the excel reports.
 - Skills learned are;
 - *Generate Excel reports.*
 - *Manage Excel reports within a job.*
 - *Reload an existing report with new or updated takeoff values.*

12:00 pm – Lunch

1:00 pm – Step #7 Continued (Customization of Excel Templates)

- Learn how to customize the Excel Templates to help streamline the bid process.
 - Skills learned are;
 - *Understand where the excel templates are located.*
 - *Understand what typical customizations are made.*

2:00 pm – Step #8 (Assemblies)

- Assemblies are a powerful tool that can be utilized, and are often managed within templates.
- In this session you will learn how to create and manage templates.
- Within those templates you will learn how to manage Assemblies by;
 - Editing Assemblies.
 - Creating Assemblies.
 - Creating Variable Size Assemblies.
 - Skills learned are;
 - *Understand the assemblies that Quotesoft has included in the program.*
 - *Learn the importance of templates.*
 - *Learn how to make an advanced assembly.*

4:00 pm – Open Class

- Here the students can work independently and focus on the different areas of the programs where they feel they need more training, or need more information on with the help of the Quotesoft Trainer. If you bring a laptop from work students also often will start to implement their programs so they can take the work back with them.

5:00 pm – End of Piping Class