



## 2-Day Sheetmetal Classroom Agenda

### Day 1

**8:00 am** – Sign In & Introductions

**8:30 am** – Step #1 (Overview)

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

**9:00 am** – Basic Take-Off

- Learn how to enter a material list.
  - o Skills learned are;
    - *How to create a new job.*
    - *How to create a new zone in the job.*
    - *How to take-off Rectangular Items, Round Items, Accessory Items, and Catalog Items.*

**10:00 am** – Review implementation steps.

- A complete review of each step involved in setting up the program.

**10:30 am** – Step #2 (DataFile Implementation)

- Learn how to customize the DataFile with your materials & cost.
  - o Skills learned are;
    - *How to safely edit the DataFile.*
    - *How to use the tools provided in the DataFile.*

**11:30 am** – Step #3 (Rectangular Pressure Files)

- Learn how to define your SMACNA Standard for Rectangular Ductwork.
  - o Skills learned are;
    - *Managing your list of the Standard, and Custom Pressure Files.*
    - *Customizing each Pressure File.*

**12:00 pm** – Lunch

**1:00 pm** – Step #4 (Round/Oval Pressure Files)

- Learn how to define your SMACNA Standard for Spiral & Round Ductwork.
  - o Skills learned are;
    - *Managing your list of the Standard, and Custom Pressure Files.*
    - *Customizing each Pressure File.*

**2:00 pm** – Step #4 Continued (Accessories File)

- Learn how to customize your Accessories File.
  - o Skills learned are;
    - *Editing Existing Items.*
    - *Creating new items.*

**3:00 pm** – Step #5 (Data & Labor Evaluation)

- Learn how to validate that the costs you entered are correct.
- Learn how to validate if the default labor is correct, and learn how to adjust the labor if it is not correct.
  - o Skills learned are;
    - *Where and how labor is defined in the program.*
    - *Basic Take-off.*
    - *Validation tools available in the Basic Take-off.*

**5:00 pm** – End of Day 1

---

**Day 2**

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

**9:00 am** – Step #6 (Reports)

- Learn how to run reports, understand the reporting;
  - o Run the Excel Exports, and the options available.
  - o Run the Crystal Reports, and the options available.
    - Skills learned are;
      - *What reports are available.*
      - *How to read the reports.*
      - *What customization options are available.*

**10:00 am** – Step #7 (OnScreen Take-Off)

- Learn how to do an OnScreen Take-off
  - o Skills learned are;
    - *Managing electronic files.*
    - *Brining a Plan file into OnScreen*
    - *How to take-off Rectangular Items, Round Items, Accessory Items, and Catalog Items in OnScreen.*
    - *Advanced OnScreen tools and features.*

**12:00 pm** – Lunch

**1:00 pm** – Step #7 Continued (OnScreen Take-Off)

**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 the Sheetmetal Class.