

MASTERBILL



eTENDER=

A Step by Step Guide for Tenderers

Introduction

The Masterbill **eTender** Program is a Bill of Quantities electronic tendering system for Surveyors, Engineers and Estimators. It is not an estimating system, but it can link to estimating systems. It is a true 32-bit program written for the Windows 9x/ NT/XP environment and is therefore capable of communicating with Microsoft Windows products.

Guide conventions

This guide has been put together to enable the new user to work their way through the eTendering process step by step.

Menu names

Main menu bar names start with a capital letter, are printed in bold type and underlined. For example: **File**.

Sub menu names start with a capital letter and are printed in bold type. For example: **Save**

Dialogue box names

Dialogue box names begin with uppercase letters. For example: Print Setup

Key combinations

Key combinations joined with a plus sign (e.g. Ctrl+N) mean that you press and hold the first key and then press the second key.

Mouse

Click = click once on the left button

Right click = click once on the right button

Double click = two clicks on the left button

About eTender

eTender allows the user to import and export electronic tendering information using XML data transfers either by the Internet or by disk. Bills of Quantities can be imported directly from XML files, which may have been e-mailed or downloaded from a QS-Website.

Once the Bill of Quantities has been imported it may be priced and then the prices can be sent back to the originator using the XML export facilities.

The Bill of Quantities may also be packaged up and sent out to other sub-contractors who are using the e-Tender application, they in turn can send back the prices for you to include in your priced Bill of Quantities. eTender does allow the use of industry standard CITE files but in the case of importing data from Masterbill's own software XML is the better option.

XML Explained

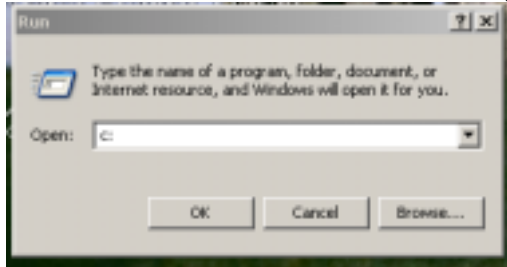
XML stands for e**X**tensible **M**ark-up **L**anguage and is a data language that describes the contents of the data held within a file. The **eTender** program uses XML as a data transfer format. So if you wish to receive or send data from the eTender program you will either save the data to an XML file on disk or transmit the file across the Internet using email.

Step 1: Installing the eTender Software

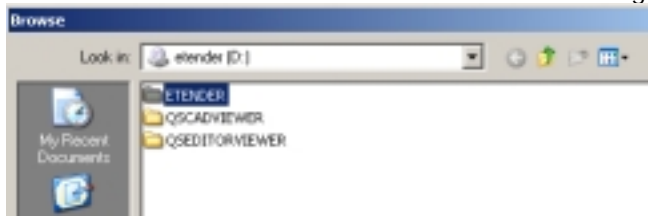
Place the eTender CD in the PC drive.
It may auto run.

If not *click* on the **Start** button and *click* **Run**
A Run dialog opens

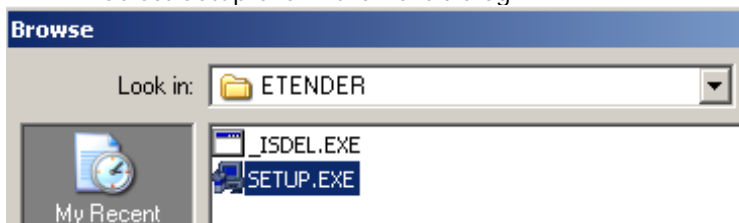
- *Click* the **Browse** button and navigate to your CD drive



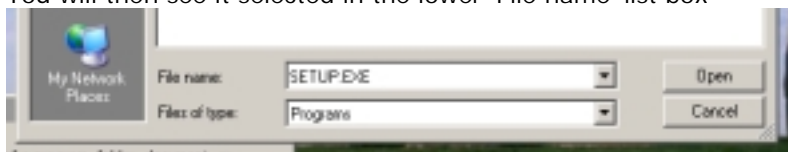
- *Double click* on **eTender** in the Browse dialog



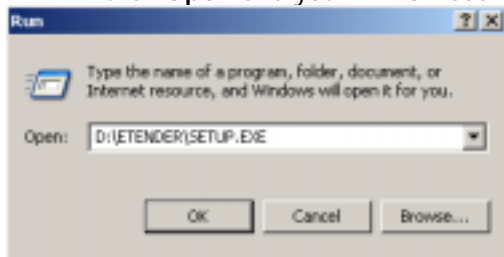
- Select Setup.exe in the next dialog



You will then see it selected in the lower 'File name' list box

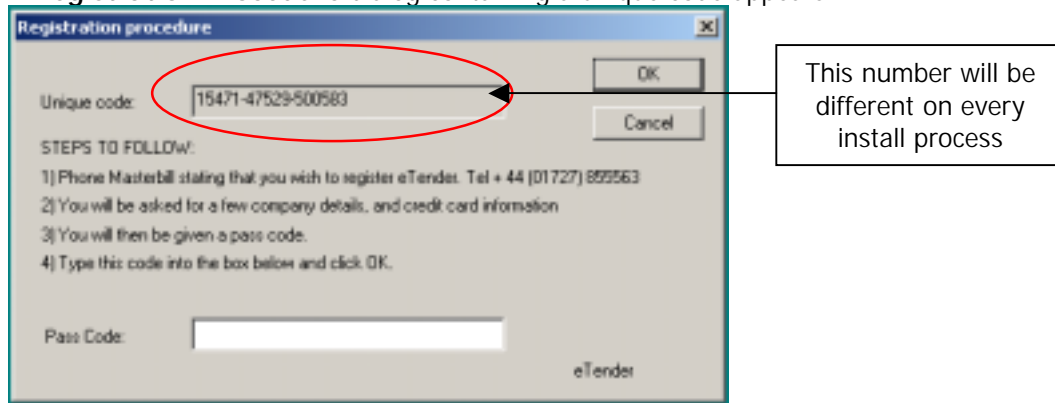


- *Click* **Open** and you will now see it in the Run dialog



- *Click* **OK** and the install will begin.

A **Registration Procedure** dialog containing a unique code appears



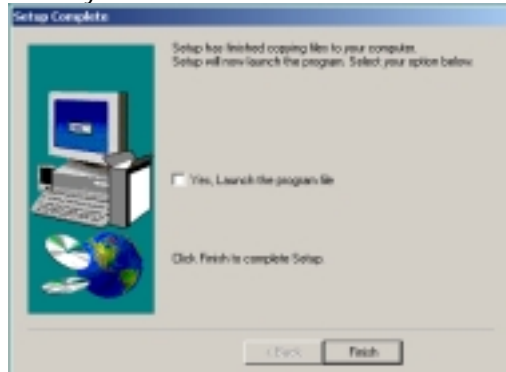
The top part of the screen will display this unique code. This code is different every time you run the install. So each install is unique to the PC in question. Installing again on another PR will constitute another licence.

Follow the on screen instructions, normally you will ring Masterbill to purchase the eTender software, and quote the Unique Code to obtain a Pass Code.

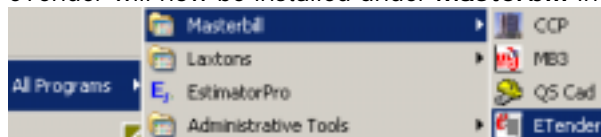
Type the pass code into the text box and *click* **OK**.
The install will now continue.

- *Click* **Next** to accept the options

When you reach the final screen *click* **Finish**.

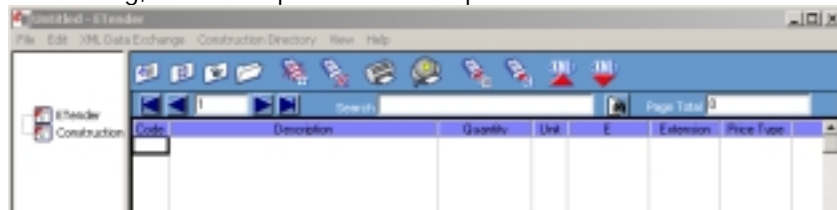


eTender will now be installed under **Masterbill** in the 'All Program' List.



Different versions of Windows may have a slightly different screen but eTender can be opened in the normal way.

On starting, a screen opens with an Explorer on the left and a Bill View screen on the right.



Bills can be imported and viewed and priced in this view screen.

As well as Menu items there are a number of shortcut buttons along the top. There are also help files under the **Help** menu

e-Tender toolbar explained.



-  New e-Tender Project.
-  New Construction Directory Project.
-  New Package.
-  Open Selected Bill or Package.
-  Connect to Construction Directory.
-  Disconnect from Construction Directory.
-  Print Bill of Quantities.
-  Print Preview the Bill of Quantities.
-  Import a document from the Construction Directory.
-  Export prices back to the Construction Directory.
-  Export to an XML file.
-  Import from an XML file.

Step 2: Importing the Tender Documents

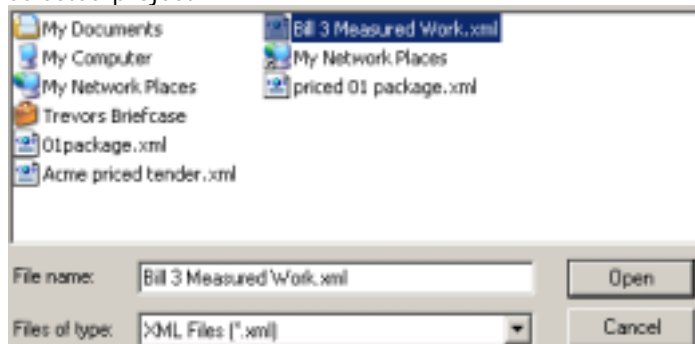
BQ's from Masterbill's own billing or estimating systems can be imported via XML. Data from other eTender users can also be imported using XML

Import a BQ via XML

To import a Bill of Quantities from an XML file you do not need to select a project in the project tree. If importing for the first time the project as well as the bill will be set up.

- Click on the XML import icon on the tool bar 

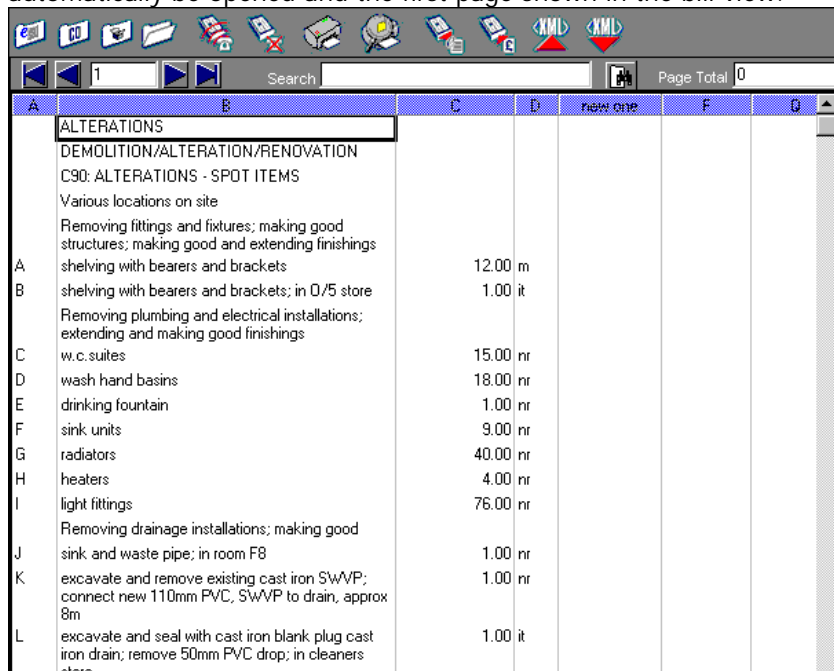
A window opens that allows you to select the XML file that you wish to import into the selected project.



It is a normal Windows dialog. Navigate to the location of the file. Highlight the XML file and...

- Click on **Open**.

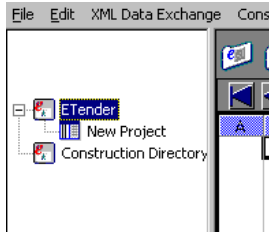
If the XML file contains a project name that is unique to your project tree then a new project will be added and the Bill of Quantities will be added to this project. The Bill of Quantities will automatically be opened and the first page shown in the bill view.



A	B	C	D	E	F	G
	ALTERATIONS					
	DEMOLITION/ALTERATION/RENOVATION					
	C90: ALTERATIONS - SPOT ITEMS					
	Various locations on site					
	Removing fittings and fixtures; making good structures; making good and extending finishings					
A	shelving with bearers and brackets		12.00	m		
B	shelving with bearers and brackets; in O/5 store		1.00	it		
	Removing plumbing and electrical installations; extending and making good finishings					
C	w.c.suites		15.00	nr		
D	wash hand basins		18.00	nr		
E	drinking fountain		1.00	nr		
F	sink units		9.00	nr		
G	radiators		40.00	nr		
H	heaters		4.00	nr		
I	light fittings		76.00	nr		
	Removing drainage installations; making good					
J	sink and waste pipe; in room F8		1.00	nr		
K	excavate and remove existing cast iron SWVP; connect new 110mm PVC, SWVP to drain, approx 8m		1.00	nr		
L	excavate and seal with cast iron blank plug cast iron drain; remove 50mm PVC drop; in cleaners store		1.00	it		

The left hand Explorer window may not refresh. Close down the programme and restart. You will see the new bill in the tree.

- Click on the "+" icon to extend the eTender tree.
- Click on the "-" icon to contract it.



If a bill has already been imported to your project, subsequent imports of additional bills will identify the project and list them in the correct place. You may still need to reopen to refresh the screen to view any packages

- Click on the project to select it, and click on the right hand open folder button to open it



Alternatively

- Right click and select **Open**



Other means of importing data

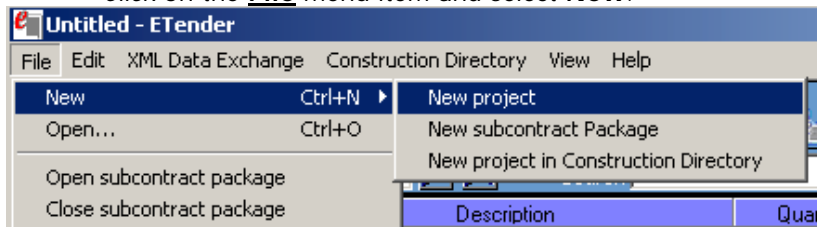
For the convenience of some users, eTender can also import data and export prices in **CITE** format (Construction Industry Trading Electronically). BQ's can be exported in CITE, e.g. to a users own Estimating programme.

CITE is an ASCII text document and most estimating systems can read in a CITE file, but many do not export.

However before a bill can be imported in CITE a project must be set up first (note this is not necessary if using XML – the XML data will set up the project.)

To start a NEW PROJECT

- Click on the **File** menu item and select **New**.



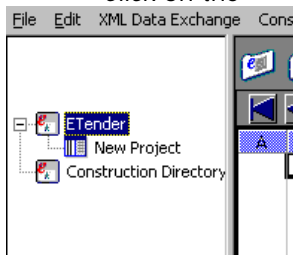
- Select **New Project**

A window opens to allow you to enter the project properties (see below).



Once you have filled in the project details and pressed **OK** the new project will appear in the project tree as shown below.

- *Click* on the "+" icon to extend the eTender tree.
- *Click* on the "-" icon to contract it.



Users can then select this project and import BQ data into it. However remember this is not essential if using XML, if the system detects a new project name then it will set up the project at the same time as importing the bill.

Step 3: Creating a package

Once a bill has been imported items can be priced, but they can also be selected and saved to a Subcontractor package.

To create a new package select the project in the project tree that you wish the package to be created in.

Select the **File** | **New** menu option.

From the sub menu select **New Subcontract Package**.

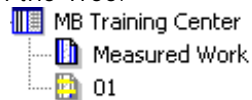
Alternatively

- Click on the **New Package** icon in the tool bar.



A window will open that will allow you to enter the package details.

Once set up, the package can be seen in the Tree.



When a package is open the bill view screen is split into two.

The left hand side is the bill of quantities that you are working from and on the right hand side is the package that you are adding items to.

A	B	C	A	B	C	D
	ALTERATIONS			ALTERATIONS		
	DEMOLITION/ALTERATION/RENOVATION			DEMOLITION/ALTERATION/RENOVATION		
	C90: ALTERATIONS - SPOT ITEMS			C90: ALTERATIONS - SPOT ITEMS		
	Various locations on site			Various locations on site		
	Removing fittings and fixtures; making good structures; making good and extending finishings			Removing fittings and fixtures; making good structures; making good and extending finishings		
A	shelving with bearers and brackets			shelving with bearers and brackets		
B	shelving with bearers and brackets; in O/5 store		A	shelving with bearers and brackets	12.00 m	
	Removing plumbing and electrical installations; extending and making good finishings			Removing plumbing and electrical installations; extending and making good finishings		
C	w.c.suites					
D	wash hand basins					
E	drinking fountain					
F	sink units					

Transfer Items

To add the items to the package *double click* on the items in the bill on the left hand side and they will be transferred to the package on the right hand side.

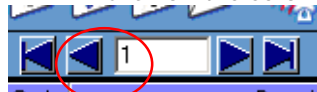
The prices are simply entered in the rate column.

A	B	C	D	My Tender	F	Q
	ALTERATIONS DEMOLITION/ALTERATION/RENOVATION C90: ALTERATIONS - SPOT ITEMS Various locations on site Removing fittings and fixtures; making good structures; making good and extending finishings					
A	shelving with bearers and brackets	12.00	m	4353.00	4353.00	Lump Sum
B	shelving with bearers and brackets; in O/5 store Removing plumbing and electrical installations; extending and making good finishings	1.00	it	6.00	6.00	Unit Rate

Type in the desired rate and hit the Down Arrow key to move down to the next item. The Page Down key will move on to another page.

Alternatively

- Click on the scroll (or 'VCR') arrows to change pages.



The inner arrows move one page at a time. The outer ones take to straight to the beginning or the end of the document.

The price type can then be selected from the drop down list of preset price types.

Once the price type has been selected the extension will change to reflect the price type.

A	B	C	D	My Tender	F	Q	R
	ALTERATIONS DEMOLITION/ALTERATION/RENOVATION C90: ALTERATIONS - SPOT ITEMS Various locations on site Removing fittings and fixtures; making good structures; making good and extending finishings						
A	shelving with bearers and brackets	12.00	m	4353.00	4353.00	Lump Sum	
B	shelving with bearers and brackets; in O/5 store Removing plumbing and electrical installations; extending and making good finishings	1.00	it	6.00	6.00	Unit Rate	
C	w.c.suites	15.00	nr	3.21	48.15	Lump Sum	
D	wash hand basins	18.00	nr	2.85	51.30	Unit Rate	
E	drinking fountain	1.00	nr	2.00	2.00	Unit Rate	
F	sink units	9.00	nr	2.85	25.65	Unit Rate	

Note: The default price type is Unit Rate.

Step 6: Incorporating Rates from a Package

Prices can be manually entered into a selected subcontract if necessary. This is done as per Step 5.

However the process can be done electronically.

Importing prices from an XML file

You may have packaged up some of the items and sent them off to subcontractors who are also using an e-Tender enabled application.

(See the section on Packages)

The prices for these items may have been returned to you as an XML file.

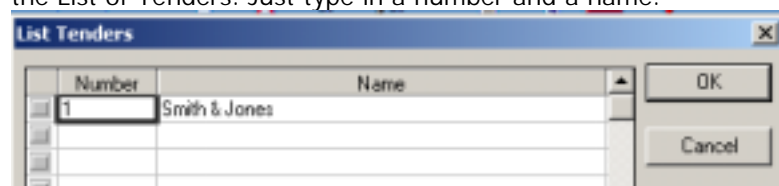
To import the prices from this file,

- Select the menu item **XML Data Exchange** and then
- Select **Import Prices**.

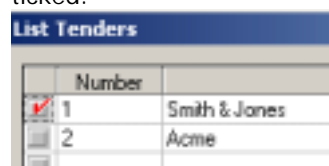
This will open a window that will allow you to select the XML file that has been sent to you. Highlight this file and click on open. Another window will open that will allow you to select a tender.



Once a tender has been selected you will be prompted to add a name of the subcontractor to the List of Tenders. Just type in a number and a name.



The prices will be imported from the file into the package and stored under the selected tender. For these prices to be stored against the named tender the left hand box must be ticked.

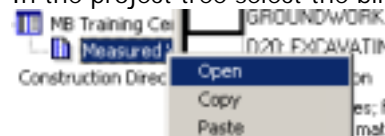


The explorer screen may not refresh properly and you may need to reopen the programme.

Importing prices from a package

Once prices from possibly several tenderers have been stored for a package the selected subcontract tender can be imported into the bill.

In the project tree select the bill of quantities that you wish to import the package prices into.



Then open this bill by

- *Right clicking* and then *Clicking Open*

or

- Selecting the **Open** icon on the tool bar.



Then,

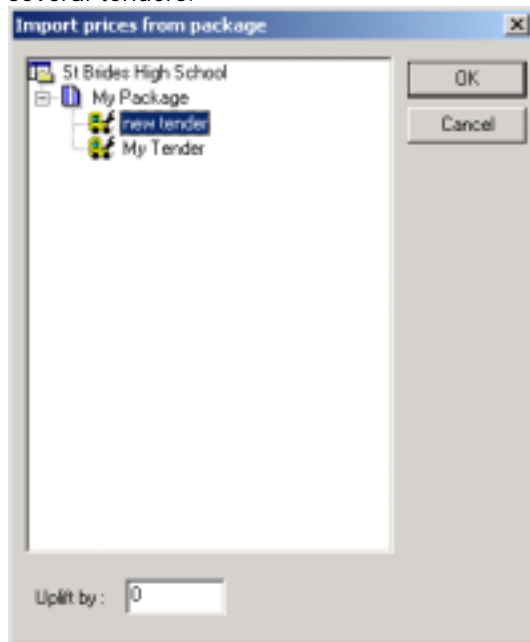
- *Right click* on the bill view and a sub menu will be opened.

From this menu

- Select **Import prices from package**.

A new window will open that will enable you to select a tender from one of the packages within this project.

As you can see below each project may contain several packages and each package may list several tenders.



Select the tender within the package that you wish to import the prices from.
You can add an uplift percentage adjustment to those prices.

NOTE

The prices that you import will overwrite any existing prices for those items in the selected tender in the open Bill of Quantities.

Step 7: Returning tender Documents

The final prices can be returned electronically. Only the prices will be imported into the target application.

Exporting the prices to an XML File

In the project tree select the bill that you wish to export the prices from.

Next ...

- Select the menu item **XML Data Exchange**

and then...

- Select **Export Prices**.

Again this will open a new window that will allow you to enter the name of the XML file that you will be exporting the prices to.

Enter a name for the file and *click* on open and the file will be saved to your specified location.

This file can then be emailed back to the originator of the bill.

If you downloaded the file from a QS-Website you will need to return to that site and upload this file back to the site.