WinEst Pro Plus 4.0

by Scott Shelley

The main strength of computer estimating software is in the reduced time it takes to perform the math, check for errors, and produce the documents necessary for a professional presentation. I've been using WinEst for three years, and I recently had an opportunity to try out the newest version — WinEst Pro Plus 4.0 ($3,999 from WinEstimator, 8209 S. 222nd St., Kent, WA 98032; 800/950-2374, *www.winest.com*). While software alone can't produce a good estimate, good estimating software will help an experienced estimator to organize and accurately project the cost of construction projects, including material takeoffs and sub and supplier quotes, as well as taxes, bonds, and markup. WinEst is one among many estimating programs, but I think it fits the bill. Take a look at the following features and decide for yourself.

Takeoff

During takeoff with WinEst, you can look up items in the database in one of four ways. You can view the database in CSI format, which is also the format for reports (see Figure 1). You can also view the database by "Name"; for example, you can display foundation-related items by choosing "Concrete" from an alphabetical listing of construction categories.

Another method for selecting takeoff items is to "Search" the database. Let's say, for example, that you're looking for an anchor bolt for a sill, but you can't remember where in the database that item is located. Rather than spend a lot of time scrolling through the CSI or Name listings, you can simply enter the keywords "anchor bolt" and let the computer do the searching (Figure 2).

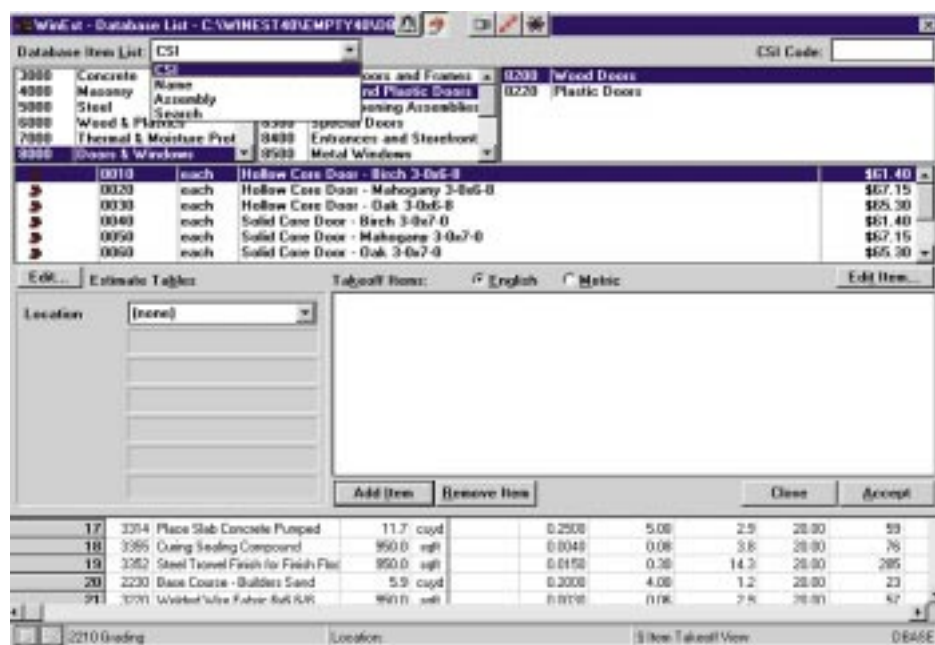The most powerful takeoff tool is the assembly, because it speeds the process.

Figure 1. The small box at the top of this WinEst takeoff screen gives you a choice of three ways to select items from the database. The view shown displays items in CSI order, but items can also be listed alphabetically by phase Name or by Assembly. The fourth choice, Search, locates items by keyword.
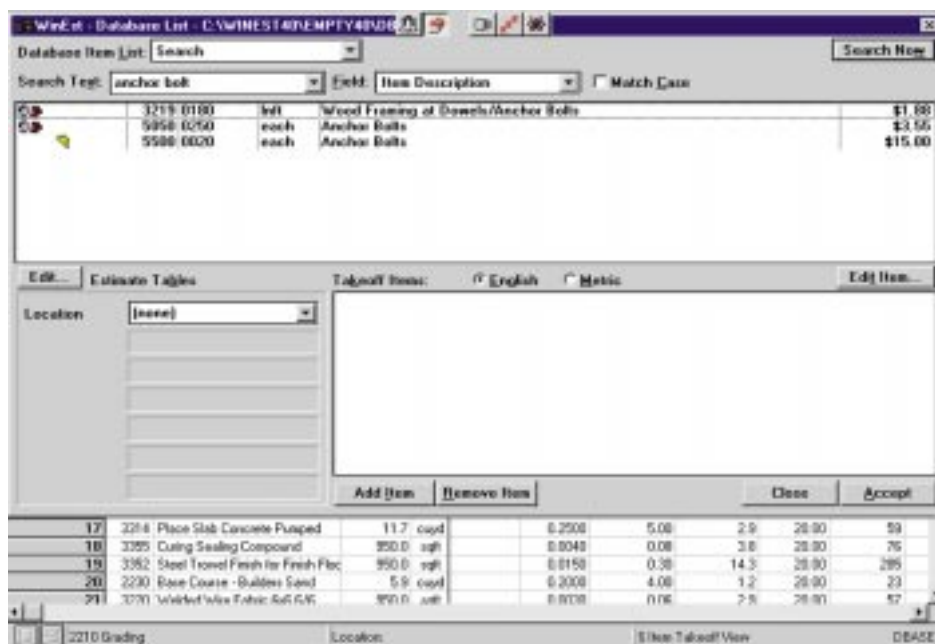

Figure 2. The Search function is a quick and easy alternative to scrolling through the database looking for an item. Here, a keyword search for "anchor bolt" found three items.

WinEst comes with pre-defined assemblies that allow you to take off many items at one time. Building a concrete footing, for example, includes excavation, compaction, forms, stakes, rebar, and concrete, plus labor. Using an assembly, you supply the height, width, and length of the footing and WinEst calculates the quantity of all items which go into building the footing (Figure 3). About 150 assemblies are built in to WinEst, including demolition, all aspects of concrete, framing, doors, tile, and even bathroom partitions.

Tagging items. WinEst also allows you to tag items during takeoff by location or by one of six user-defined categories called work breakdown structure (WBS) codes. This is useful for keeping track of where on the plans a takeoff item came from. For instance, when I take off an item, I usually tag it with the page and section number from the plans. The WBS code might be AS3: the "S3" stands for " structural page 3"; the "A," for "section A." Later, if a change in the design requires me to refigure a portion of the estimate, I can trace any item back to a particular part of the plan.

Using WBS codes, you can also keep track of the cost of the job by phases of the work. During the WinEst test estimate I did for this article, for example, the architect asked me to break out the price for different aspects of the structural work. I had no problem creating WBS codes for each one.
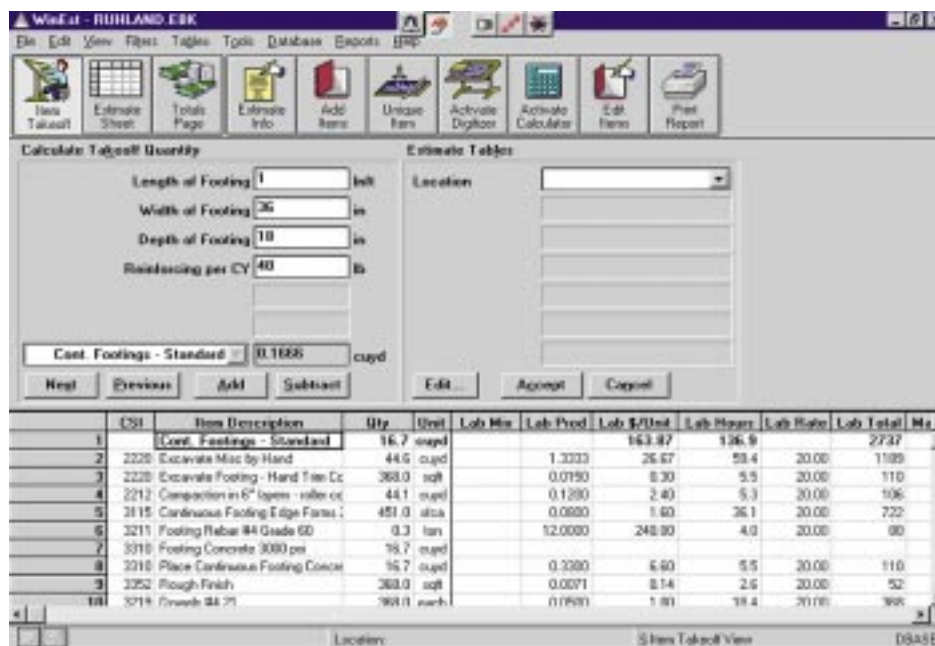

Figure 3. An assembly is a group of items that can be taken off together. For the concrete footing takeoff in this example, entering length, width, depth, and amount of reinforcing yields a list of all individual items needed to build the footing. Takeoff items can also be tagged by Location (middle right of screen) or any of six work breakdown structure codes.
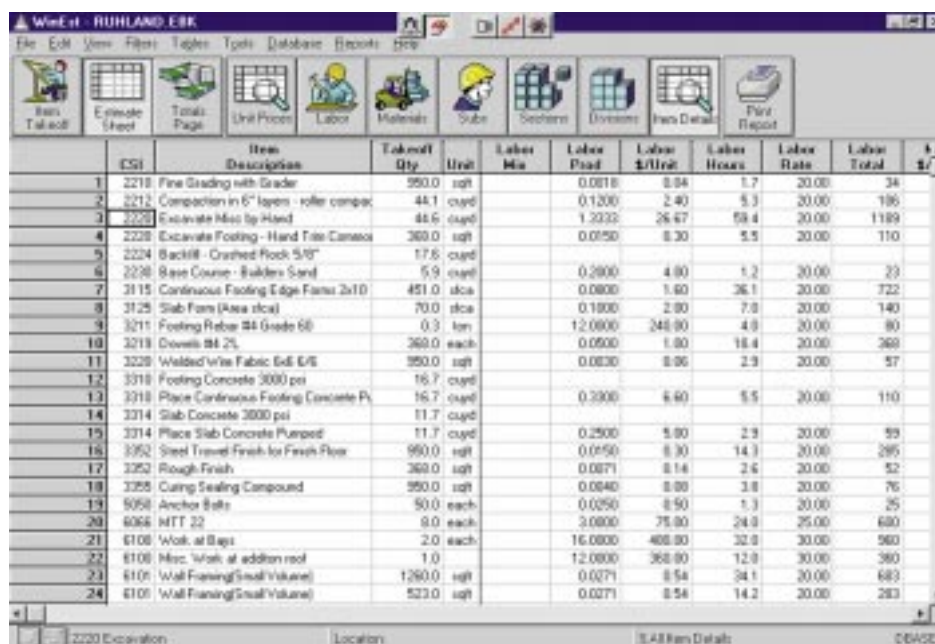

Figure 4. Buttons at the top of the screen allow you to select from several different ways to display takeoff items on the Estimate Sheet. Here, the Item Details button has been selected.

Estimate Sheet

The estimate sheet in WinEst looks like a spreadsheet (Figure 4); in fact, you can cut and paste between WinEst and most spreadsheet applications. The difference is that, in WinEst, you can change the way the information on the estimate sheet is displayed with a simple click of a button. For example, you can view unit cost, or you can view all of the details that make up the unit cost. The unit cost for a rebar item like "3219 Dowels #4 2'L" is the sum of the costs of labor, material, and subcontractors; the detail would show how much the steel cost, the number and cost of the man-hours required to install it, and any subcontractor costs to fabricate the rebar.

You can also sort, or filter, the estimate sheet to show cost and other information for Subcontractors, Labor, Material, Division, or Section. This is a handy feature when it's time to call the lumberyard to check prices. If the database had a price of $460 per thousand board feet of studs and the lumberyard tells you the price is now $560 per thousand, you can easily find the specific item in the Material view and change the price.

Estimate Totals

WinEst has a Totals Page where you can apply net and gross markups, as well

Figure 5. The Totals Page displays cost summaries in five categories: labor, material, subcontractor, equipment, and other. Sales tax, overhead and profit, and other markups can also be added as lump sums or dispersed throughout all items in the estimate.

as taxes and bonds (Figure 5). A 5% fudge factor added to hard costs, for example, would be a net markup; to that you can then add a gross markup of, say, 35% to cover overhead and profit.

One nice feature is the ability to allocate net markups back into the estimate. Let's say you don't want to show your client that 5% fudge factor as a lump sum. You can set up the total amount as a net markup and let WinEst distribute the cost evenly across all items in the estimate. Instead of showing the contingency as a lump sum, it is buried throughout the estimate. By filtering the estimate to display a single phase of con-struction (sitework, for example), you can allocate net markups to selected phases of work.

Learning Curve

Using the new version of WinEst, I completed an estimate for a $180,000 job in about eight hours , but not before I'd climbed the learning curve. When I first started using WinEst, it took me about three estimates before I was comfortable with knowing where everything was located and making it all work. Even now, I still discover features, filters, and other useful aspects of the program that I hadn't been aware of.

The steepest part of the learning curve has to do with the database. I always assume that the information in an estimating database represents the best-case scenario. In other words, the built-in prices assume that you can pull right up to the site with your truck, the lot is flat, and all materials can be delivered close to where they will be installed. To adjust for real-world conditions, you have to use your experience and judgment. For example, in the jobs I do I have to contend with lots of "wild cards," such as poor access, steep hillside sites, and chatty clients. There are also smaller problems, like the fact that any debris box left on the street overnight will be filled with old furniture by the next morning.

To compensate, I have added items to the database, as well as changed some of the information for certain items. For example, I know for a fact that the relatively small amount of framing we typically do cannot be produced at the rate given in the database. So I have changed many framing items to more accurately reflect my company's actual productivity. These kinds of adjustments are necessary in WinEst, as with any other estimating software.

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