IntelliBid/JobTrac Version 10.0 RELEASE NOTES



February 2022

IntelliBid v10.0 Major Enhancements

(See below for detailed information)

- Sum material and labor totals of selected items in Takeoff and Summary grids
- Bid Due date/time alarms in Job Register
- Expanded Phase Breakdown includes 'Raw Cost values', Labor Hours and Phase Percentage
- Ability to move phases within the Master Phase Tree template
- Ability to replace an item in an assembly from the Header grid in Item Library Maintenance
- Modified rollup calculations to better handle DJC distribution on negative bids amounts
- Added "View Item" to IntelliBid Explorer and all other places items are listed
- Specifying a user as Project Manager, Estimator and Engineer automatically allows access to the job
- Maintain Takeoff Unit and Factor values for Temp Assemblies
- Bid Grouping report, using the Summary Grouping selection function now available in Bid Recap
- Added the Substitute field in Item Maintenance Select/Fill
- Added a User Access right to allow the ability to inactivate jobs in Job Register
- Import linear measurements from SureCount into Count Sheets
- Added ability to add Formula records to Formula Maintenance
- Added 'Unique ID' field to Item Find function (requested for the Australian database)
- The 'Update all Vendors' function now also applies to the *Unique ID* field
- Filters for the Subtotal and Cost Code selection dialogs

Australian Updates

These are exclusive to the Australian version of IntelliBid

- Traser 2.0 and Traser CX Price updates now offer an option to "Update all items". This resolves an issue where the price update does not occur if the Last Edit date for the item in IntelliBid is later than the date in Traser.
- Date formats have been fixed to apply the correct format from the local machine regional settings.
- Auto-archive in the Australian database now works with the regional date format.

New Reports

- Installation reports for the Qty-Desc-Unit Price Ext include the Labor Hours Unit as an option
- Takeoff Comment Summary Report combines like comments for better quote submittals
- Installation Comment Phase report summarizes Comments by Phase
- Summary report listing Labor Level units by item for Labor Levels 1, 2 and 3

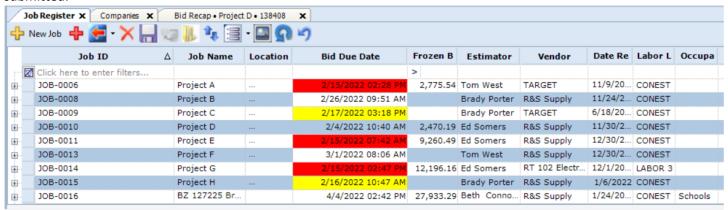
JobTrac v10.0 Enhancements/Fixes

- Delete function added to Resource Time Cards
- Fixed a time-out error occurring when displaying a large number of Change Orders
- Added Job ID and Name to Submittal reports

Enhancement Descriptions

Bid Due Date alarm in Job Register (95321)

A Preference sets the number of lead days for an alert on bids due. A different background color in the Bid Due Date column in Job Register appears as the Bid Due Date approaches and passes. It is set to yellow for dates that fall within the number of lead days set in Preferences, and red when the date is today or has passed and a proposal has not been submitted.

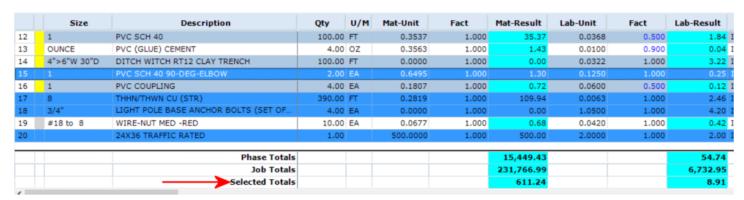


Bid Due Time (130039)

Bid Due Time is now displayed with the Bid Due Date in the Job Register grid and tab (see above image). (130039)

Selected rows totals in Summary and Takeoff (112307)

Now you can select rows in Summary or Takeoff and see the total Material and Labor by Phase and Job for just those items.



Phase Breakdown with more view options (127913, 111087)

Changes to Phase Breakdown include:

- Added Labor Hours to the main view
- Show the phase percent of job
- Added a 'Raw Cost' view to show totals without Overhead and Profit

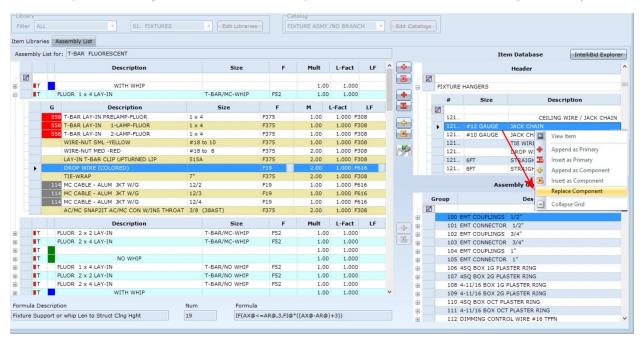


Moving phases within the Master Phase Tree template now available (102474)

The ability to move phases within the master Phase Tree template has been added. Look for the **Phase Up** and **Phase Down** buttons in the controls.

Replace an item in an assembly in Item Library Maintenance (102831)

Individual items can now be replaced with one click in Item Library Maintenance. Select the item in the assembly you want to replace, then right-click on the item to replace the selected item and click Replace Component.



DJC Distribution when bid total is negative (97474)

Modified rollup calculations to handle total negative bid amounts properly by using a method that correctly distributes DJC to positive and negative phases keeping all DJC values positive and split evenly among phases.

Link Estimators, Project Managers and Engineers to the Job User list (109475)

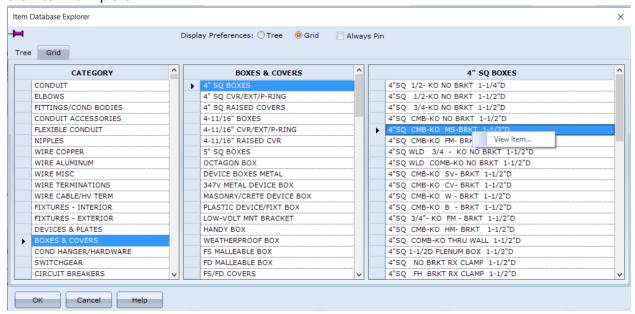
When you specify the Estimator, Project Manager or Engineer in Job Register, those contacts are also added to the job user list, automatically giving those individuals access to the job.

Maintain Takeoff Unit and Factor values for Temp Assemblies (110861)

When Temp Assemblies are created, they now maintain the edited material and labor unit and the factor values as they appear in Takeoff rather than using the values from the database. This means edits to Takeoff to these values prior to copying/pasting a Temp Assembly will retain the edited values and not replace them with values from the database.

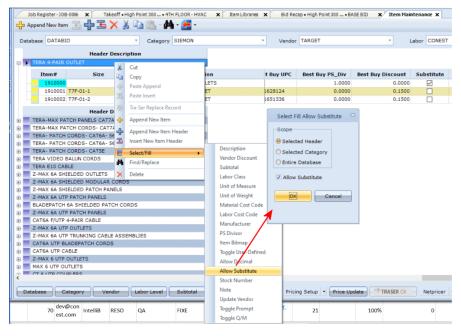
View Item feature now in IntelliBid Explorer and other item display locations (102851)

The View Item feature is popular with customers and has now been added to most all places items are listed including the IntelliBid Explorer.



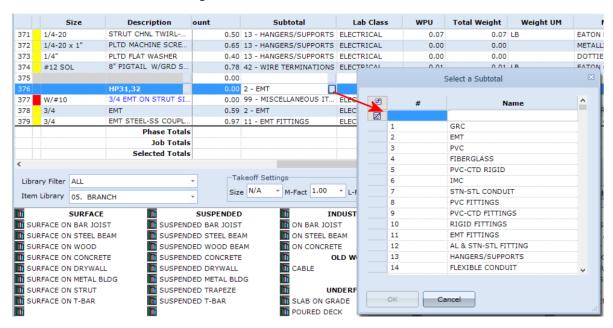
Add Item Maintenance Select/Fill for 'Substitute' (111863)

Item Maintenance has a function that allows you to update settings for all the items within a Header, Category or for the entire Database. A new Allow Substitute function was added that specifies whether substitution for an item can be made during a NetPricer update. There are many items that are manufacturer specific, especially in the low voltage portion of the database. You may not want to allow the price update to substitute a different manufacturer's item. This feature allows you to determine whether a substitution can be set during the price update.



Filter the Subtotal and Cost Code selection dialogs (121885, 121889)

The Maintenance function for editing Subtotals and Cost Codes has the filter row to allow you to find specific entries without scrolling through the list. We have added this filter to the places where you can assign these settings to an item for easier selection. These are in the Select/Fill function in Item Maintenance and when editing these fields in the Takeoff and Item Maintenance grids.



Add User Access right to inactivate jobs in Job Register (123507)

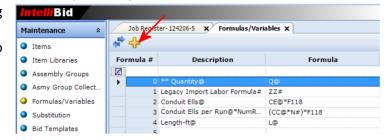
This gives the administrator the ability to restrict which users can set job status "inactive". The User Access tab in Maintenance has the Job inactivate feature listed to allow or dis-allow a user's ability to inactivate a job.

Import linear measurements from SureCount into Count Sheets (128072)

Linear measurements in SureCount will now import into Fixtures, Devices, Fire Alarm, L-Volt, Data, and User Defined Count Sheets.

Additional Formula rows added to Formula Maintenance (135981)

In response to a customer request, we've begun adding new formulas and variables to the database to allow users to perform takeoff with metric units (Meters). To accommodate the additional formulas this will eventually require, there is now a button to add the number of rows needed. Edits to the Description and Formula fields remains the same.



Update all Vendors includes the Unique ID field (133329)

In Vendor Maintenance, there is a check box labeled **Update all Vendors**. When checked, updates made to an item automatically updates all Vendors. The updates are made to Material Unit, Price Code, PS-Div, Catalog Number, Manufacturer and now Unique ID.

New to Reporting

A Bid Grouping report in Bid Recap, with the same options as in the Summary Grouping report using the bid values associated with each item. (110868)

Bid Grouping Report

Tax Rate	status: Default		В	id Name: CONES	ST.		Bid T	emplate: BASIC (E	XPANDED O&P
Phase: FEI	EDERS								
Item #	Size	Description	Qty	Material Unit \$	Unit Hrs.	Labor Unit \$	Unit \$	Ext. Labor Hrs.	Extension \$
12	BX100-V	RECEPTACLE BOX	6.00	148.30	1.50	118.69	266.99	9.00	1,601.96
13	60A 480V	HUBBELL HBL560R7	6.00	453.80	1.00	79.13	532.93	6.00	3,197.58
40126	1	GRND BUSHING INSULATED	12.00	12.51	0.45	35.61	48.12	5.40	577.40
50082	1	LIQUIDTITE CONDUIT	420.00	3.07	0.11	8.86	11.94	47.04	5,012.76
50093	1	LIQUIDTITE ANGLE CONNECTOR	6.00	9.55	0.43	34.18	43.73	2.59	262.38
50104	1	LIQUIDTITE STRAIGHT CONNECTOR	6.00	5.08	0.36	28.49	33.56	2.16	201.39
70036	6.	THHN/THWN CU (STR)	1,920.00	1.70	0.01	1.04	2.74	25.34	5,262.83
70146	10.	GREEN THHN CU (GRD 60A)	480.00	0.63	0.01	0.83	1.46	5.04	700.63
		Group Totals:						102.58	\$16,816.92
		Job Totals:						102.58	\$16,816,92

- The Phase Breakdown report includes both Labor Hours and Labor \$ as well as the Phase Percentage values replicating the values shown in the Phase Breakdown window. (125472)
- Installation reports for the Qty-Desc-Unit Price Ext versions now have the option to include the Labor Hours Unit on the report. (125847)

Installations Report

						17 Aug 20	21 8:29:31
Tax Rate st	t atus: Default	Bid Name: Base Bid			Bid Tem	plate: BASIC (EX	(PANDED O&P)
Qty	Description		Unit Hrs.	Material \$	Labor \$	Unit Price	Extension
1000	EMT 3/4		0.03	1.12	1.12	2.24	2,238.00
2000	EMT 3/4		0.03	1.12	1.12	2.24	4,476.00
100	DEMOLITION BY M	AN HOUR	1.00	0.00	40.00	40.00	4,000.00

184.00 Labor Hours: **Material Extension:** \$3,354.00 \$7,360.00 Labor Extension: \$10,714.00 Total Extension:

Takeoff has a new Comment Summary report that combines Comments with the same Comment text with total quantities for the job for better quote submittals to vendors. (128571)

Comment Summary

		15 Feb 2022 15:38:06
Comment Title	Quantity	
Circuit 25	100	
FIXTURE A	150	
FIXTURE B	52	
FIXTURE C	20	
FIXTURE X	12	
SC 15' NO BRANCH	21	

New Installation report: "Comment – Phase" summarizes material and labor in Comments by Phase. (129699)

						4 Nov	2021 16:06:21
Tax Rate status: Default		Bid Template: BASIC (EXPANDED 08/					
Description	Qty.	Unit Hrs.	Hrs. Total	Material \$	Labor \$	Unit Price	Extension
Phase: FIXTURES							
FIXTURE A	100	1.49	148.80	50.89	78.77	129.66	12,966.22
FIXTURE B	52	0.89	46.17	16.06	47.00	63.06	3,279.33
FIXTURE A	25	1.49	37.27	50.99	78.92	129.90	3,247.60
		_	232.24			_	19,493.15
Phase: DEVICES							
SC 15' NO BRANCH	21	6.59	138.46	397.45	349.01	746.46	15,675.59
		-	138.46			_	15,675.59
Phase: BRANCH							
Circuit 25	100	0.09	8.56	3.63	4.53	8.16	815.95
		-	8.56			_	815.95
	_	port Totals:	379.26			_	35,984.69

Added a report to Summary that lists Labor Level units by item for Labor Levels 1, 2 and 3 in response to customer requests. (132021)

Summary with Labor Units and Result for Levels 1 - 3

Item #	Size	Description	Type	Quantity	UoM	Material Unit/Result*		Labor Lvl 1 Unit/Result**		Labor Lvl 2 Unit/Result**		Labor Lvl 3 Unit/Result**	
12	BX100-V	RECEPTACLE BOX	М	6.00	EA	125.0000	750.00	1.5000	9.00	1.5000	9.00	1.5000	9.00
13	60A 480V	HUBBELL HBL560R7	M	6.00	EA	382.5000	2,295.00	1.0000	6.00	1.0000	6.00	1.0000	6.00
40126	1	GRND BUSHING INSULATED	M	12.00	EA	10.5438	126.53	0.3000	3.60	0.3700	4.44	0.4500	5.40
50082	1	LIQUIDTITE CONDUIT	M	420.00	FT	2.5900	1,087.80	0.0750	31.50	0.0930	39.06	0.1120	47.04
50093	1	LIQUIDTITE ANGLE CONNECTOR	M	6.00	EA	8.0469	48.28	0.2880	1.73	0.3600	2.16	0.4320	2.59
50104	1	LIQUIDTITE STRAIGHT CONNECTOR	M	6.00	EA	4.2805	25.68	0.2400	1.44	0.3000	1.80	0.3600	2.16
70036	6.	THHN/THWN CU (STR)	M	1,920.00	FT	1.4300	2,745.60	0.0088	16.90	0.0110	21.12	0.0132	25.34
70146	10.	GREEN THHN CU (GRD 60A)	M	480.00	FT	0.5300	254.40	0.0080	3.84	0.0100	4.80	0.0120	5.76
							\$7,333,29		\$74.00		\$88.38		\$103.30

Ochment Detail Cost Report (132622)

This report is the Comments Only Summary Installation report which sums Comments across Phases, showing Material and Labor \$ raw value totals (tax, overhead and profit not included) and the totals.

Comment Detail Cost Report											
									10 Jan 2	022 9:36:58	
Tax Rate status: Default Bid Name: Base Bid Bid Template: BASIC (EXPA											
Description	Qty.	Mat. Unit Cost	Mat. Cost Result	Labor Unit Hrs.	Labor L Result Hrs.	abor Cost Unit \$	Labor Cost Result \$	Mat. & Lab. Ext. Cost \$	Total w /Tax	Total w /Tax, OH & Profit	
FIXTURE A	125	46.88	5,860.05	1.49	186.07	76.91	9,613.67	15,473.72	16,306.01	16,706.30	
FIXTURE B	52	14.79	769.13	0.89	46.17	45.87	2,385.47	3,154.60	3,320.03	3,401.53	
SC 15' NO BRANCH	21	365.97	7,685.27	6.59	138.46	340.65	7,153.60	14,838.87	15,657.67	16,042.05	
Circuit 25	100	3.34	334.14	0.09	8.56	4.42	442.22	776.35	818.51	838.61	
Totals:			\$14,648.60		379.26		\$19,594.95		\$36,102.22	\$36,988.49	

- Option to have color coded values of prices show on Summary Cost Code report (133520)
- The Item Installation reports now tag only items with Labor Classes of Low Voltage or Machine Operator. This was a customer request to eliminate Labor Class of 'Electrical' on items due to the repetitive look of tagging items with this text. (134298)
- The Note field in the Quotes, Equipment and Subcontractor tabs have been added to the Quote Summary report. (132823)
- Added an option to show the Summary Grouping report Material and Labor Results as displayed on-screen with decimal places or rounded to whole Dollar amounts. (133033)
- Summary Item and Summary Subtotal reports list Material and Quote totals separately. A customer request to add those values together on the report so the reports show both the separate values and a Grand Total amount of Material/Quotes/Equipment/Subcontract. (130817)
- Bid Summary report lists Adjustments and taxes in the breakdown of Labor sections. (138677)

IntelliBid Fixes

- Corrected Substitution to calculate and allow decimal quantities in Takeoff. (121052)
- Corrected an error in Smart Select when sub-phase names contain a semi-colon. (125760)
- Tax rates in Job Register use 4 decimal places (126701)
- Fixed inclusion of the Engineer on proposals to look at both the In-house Engineer and any contacts added to the job as Engineers. (127946)
- Corrected a Count Sheet issue when duplicate symbol names are used. (129897)
- Fixed a situation where Job Auto-numbering is skipping numbers resulting in number sequence gaps. (130040)
- NetPricer updates check the incoming prices and flag prices that are significantly higher than the original price. This sometimes leads to incorrect prices which need to be manually updated. A check box to override large price deviations during the update eliminates the need for extensive manual updates. (130152)
- Vendors can now be marked as 'hidden' for new jobs but remain in the Vendor list to maintain vendor information on previous jobs. (130386)
- Enable the Options dialog when performing a Takeoff Recalc on Vendor or Labor Level to allow more flexibility in which fields are recalculated. (130477)
- Updates made to attributes to fix an issue with Low Voltage labor that caused an Exception Data error in Bid Recap. (130831)
- Fixed an issue in Summary where editing was not displaying the values typed. (130945)
- Fixed the feature to allow Admin to log off users that was not working properly. (131315)
- Adjusted the restore of Estimator name after a job was archived. (131321)
- Fixed an issue when an Archive Location was not designated in Maintenance. (132023)
- Suppressed the Copies field in Transmittals when it is zero. (132429)
- Fixed an issue where items were losing values when importing jobs. (132858)

Database Updates

- Switches and Lighting Control are separated into their own phases and libraries
- Added additional Romex wire types
- Added TC-ER-HL cable
- Additional EV Charging station assemblies
- Additional Solar Panel assemblies
- Additional Pole Line assemblies
- New 'Canless' recessed LED light fixture assemblies added (cable only)
- Updated Tel/Data items
- Updated lighting control items (Lutron, Wattstopper, Acuity Brands)
- Added Cable Bus
- Added aluminum Busduct
- Added Cable Substitution #12 to #14
- Added 2-Hour Fire Rated MC Cable
- 347/600V Breakers added (Canadian)