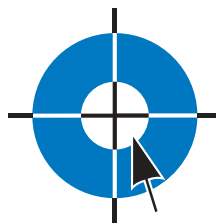


ON-SCREEN
Takeoff®
Advanced Takeoff Software



User's Guide
User's Guide
User's Guide



On Center
SOFTWARE

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Section 1

Introduction

User's Guide

This User's Guide is intended to help you to quickly get started using On-Screen Takeoff. The guide is broken into sections and contains information about the major tasks you will complete with the program. The Table of Contents provides an easy to follow outline of the sections and subsections of the guide.

The guide and the accompanying Help System are designed to be user-friendly. If you have any suggestions about how we can make your reference materials better, feel free to e-mail us at docs@oncenter.com. Your input and feedback will help ensure that you get the most out of your software.

Typographic Conventions

Terms of importance, titles to dialog boxes and main menu items will be Capitalized and placed in **bold** for easy recognition when skimming through pages.

Menu items you are instructed to choose appear in **bold** with the greater than (>) symbol separating each menu level. For example, if you are instructed to select the **Open** command in the **File** menu, it appears as **File > Open**.

Helpful hints or information about the topic are provided throughout the document. They will be labeled, '**NOTE**' (all caps and bold font to catch your attention).

Several topics will have more detailed steps outlined in either another section of the User Guide, or the Help System. They will always be referenced in italics and underlined. For example, "See *Section 1, Program Help* for more information."

Program Help

In addition to this guide, you have access to the Program Help system. The help references provide in-depth information about major and minor aspects of the program. Many of the dialogs have help associated with them. To access specific information about a dialog or topic, press **F1** on your keyboard to bring up the information. You can also access Program Help, by clicking the **Help** menu in On-Screen Takeoff.

The Help System is part of your program. Internet access is not required to take advantage of this tool. The help system allows you to search by key word for almost any detail or piece of information. Moreover, most topics have hyperlinks, usually underlined and in blue, that direct you to related information.

Anything that appears in blue and/or is underlined is a link to additional information. Click on a link to access additional information. Sometimes you will have to click on the link again to hide the information if you like.

Related topic links appear on many of the pages. These are included to help you find information that is related to the current page you are viewing.

Contents Tab

The **Contents** tab provides a breakdown of the **Help** topics. To view this guide, click the **Contents** tab. Each topic is represented by a **Topic** icon . Open a topic by clicking the icon next to the topic, or double click the **Topic** icon for the same results.

Below each topic are sub-topics represented by a **Sub-topic** icon . Clicking a sub-topic will display its contents in the right-side pane.

Close a topic by clicking the icon, or double click the **Open Topic** icon.

Index Tab

The **Index** tab shows a list of indexed topics in alphabetical order. It should be used like a book's index.

You may type the first few letters of the word or topic you are looking for in the keyword list. This will filter the list down to display only topics that start with the letters you entered. If you can't locate a particular item, try reducing the number of words in the search. For instance, instead of searching for Creating Alternates, try typing in Alternates. This usually helps you to locate information quickly.

You may also search for a topic by scrolling through the keyword list manually. Double-click on any of the keywords and the corresponding topic appears in the right-hand pane.

Search Tab

You may want to search to locate every occurrence of a word or phrase in the guide. To search for a word, click the **Search** tab and then type the word(s) you are looking for. When the list of topics displays, double-click the topic you want to have displayed. The corresponding topic and its contents will display in the right-hand pane.

The **Search** tab works by listing every topic in which the word you typed in appears. Usually, this means you will see a large list.

Quick Tips

Tool Tips	If you do not understand what a button is for, hover the mouse over it. A Tool Tip will appear.
Status Bar	If the program seems like it is processing information but you are unsure of what is happening, try looking at the Status Bar. The Status Bar is located at the very bottom of the Image window. It displays information about what On-Screen Takeoff is doing internally.
Pop-Up Menus	You can right-click on most objects and within most dialogs to view Pop-Up Menus with options available for use.
Expand/Collapse Option	You can expand any folder, condition type or other heading by clicking on the plus sign [+] next to it. You can collapse any folder or heading by clicking the minus sign [-] next to it.
Unhandled Exceptions	If the program encounters unhandled exceptions to the application, a dialog box will be triggered. The dialog box will display a message and include a button to send a log file to On Center Software with the stack trace, system information and version information.



Section 2

Installation & Authorization

System Requirements

The following table lists the minimum requirements for running On-Screen Takeoff. The recommended requirements, however, will allow your program to run faster and with greater screen resolution.

	Minimum	Recommended
Windows Operating System	Windows® 2000 (SP4), Windows XP (SP2) or Windows Vista (program will not run on Windows 3.X, Windows 95 or Windows 98)	Windows XP (SP2)
Processor	32 Bit, 1 GHz (program is not supported on 64 bit)	32 Bit Dual Core/2.66 GHz
Memory	512 MB	1 GAB or more
Monitor/Resolution	Super VGA (800x600)	XGA (1024x768) or more or Dual Monitors
Free Hard Drive Space	500 MB	1 GB or more
Web Browser	Microsoft Internet Explorer 6.0 or later	Microsoft Internet Explorer 6.0 or later
Video Card	NA	128 MB Dedicated V-Ram

Installing with Auto-run

1. Insert the **Installation** CD into your CD drive.
2. On the **Product Startup** dialog, choose **Install Software**.
3. Click **Install On-Screen Takeoff**. The **Welcome** dialog will begin preparing for installation.
4. On the **Welcome Wizard** dialog, click **Next** to begin the installation.
5. Click **Next** after reading the upgrade notice.
6. After reading the license agreement, you must accept the terms of the license by selecting the **I Accept** button, then click **Next**.
7. At the **Customer Information** dialog, enter your **User Name**, **Company Name** and **Client ID** (number that came with your On-Screen Takeoff package).
8. Select users for the application (all users is recommended), and click **Next**.
9. At the **Choose Destination Location** dialog screen, note the **Destination Folder**, and click **Next** to install On-Screen Takeoff to this location. If you want to install On-Screen Takeoff to another location, click the **Browse** button, and navigate to the new location.
10. At the **Select Features** dialog, make sure that **On-Screen Takeoff Application** is checked and select all the other features you want to install. If you are planning to attend a few Training Sessions, click the **Sample Databases** box.
11. Click **Next**.
12. At the **Start Copying Files** dialog, make sure you have chosen all of the features you want to install and click **Install**.
13. Once the installation is complete, click **Finish**.
14. If you have been furnished a hardware security device, install it now. See *Section 2, Installation & Authorization, Installing Rainbow Sentinel Drivers* on the following page for instructions.

Installing without Auto-run

1. Insert the **Installation CD** in the CD drive.
2. Select **Start > Run**.
3. Click **Browse** and navigate to your CD-ROM drive.
4. Double-click on **Launch.exe**.
5. Click the **OK** button.
6. The **Product Startup** dialog will now launch.
7. Follow the instructions 1-14 from *Section 2, Installation & Authorization, Installing with Auto-run*.

Installing Rainbow Sentinel Drivers

1. Insert the **Installation CD** in the CD drive, and make sure the **USB dongle is removed**.
2. Select **Install Software**.
3. Select **Additional Software & Drivers**.
4. Select **Sentinel Drivers**.

NOTE: If you do not have the CD, the driver can be downloaded via the internet at <http://downloads.oncenter.com/Drivers/SSD5411-32bit.exe>.

Rainbow Sentinel Driver Troubleshooting



1. Verify your dongle is physically connected to your computer. If it's not connected, connect it.
2. Open On-Screen Takeoff.
3. From the **File** menu, click **Check Authorization**.
4. In the **License Authorization** dialog, your **Host ID** is listed. If this number is an 8 to 11 digit number, go to step 16 below.
5. If this number is a long character string (ex. 000D000F000E etc.) or blank, the dongle is not properly installed making it unrecognizable to your PC.
6. Close On-Screen Takeoff, and unplug your dongle from your PC.
7. Insert your **On-Screen Takeoff CD**.
8. Choose Browse CD (It should auto-run the **Demo Shield** installer).
9. Open the **Rainbow** folder.
10. Inside the **Rainbow** folder there is a file called **SSD5411 32-bit.exe**.
11. Double-click the file to open it.
12. Follow the instructions for the driver installation. Reboot your computer if prompted.
13. Once installation is complete and/or once computer is rebooted, plug in your dongle.
14. Open On-Screen Takeoff.
15. From the **File** menu, click **Check Authorization**.
16. Your **Host ID** should now appear as an 8 to 11 digit number. If it does, click **Reauthorize..**
17. If it still is not generating an 8 to 11 digit number, there is a problem with your computer, operating system or dongle. You can access the online authorization and troubleshooter at www.oncenter.com/support/authorization.html.

Authorizing On-Screen Takeoff

After installing On-Screen Takeoff, insert your security key (dongle). Once authorized, you should not lose authorization as long as the dongle is plugged in. If removed while using the software, you will lose the license and will need to be reauthorized again via the Internet.

An internet connection is also important for the license validation process that occurs every 60 days to update your license. If your computer does not have Internet access, call the On Center Software Authorization Department at 866-689-5687.

NOTE: You will need your **Client ID**, provided by On Center Software, to authorize On-Screen Takeoff.

1. From the **File** menu, click **Check Authorization**.
2. If the number in the **Client ID** field does not match your records, click .
3. Re-enter your **Client ID** and click .
4. The program will receive authorization via the Internet and will be unlocked. You will see TKO in the bottom right corner of the application.

Authorization for Upgrades

If you are upgrading your OST, it is important to check to make sure you have a valid license for the product version before you upgrade. If you are unsure, contact your sales representative before you upgrade.

NOTE: Upgrading your databases before you check authorization will prevent you from working in those databases if you are unauthorized for that version.

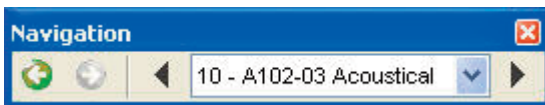


Section 3

Toolbars, Menus & Shortcuts

Toolbars

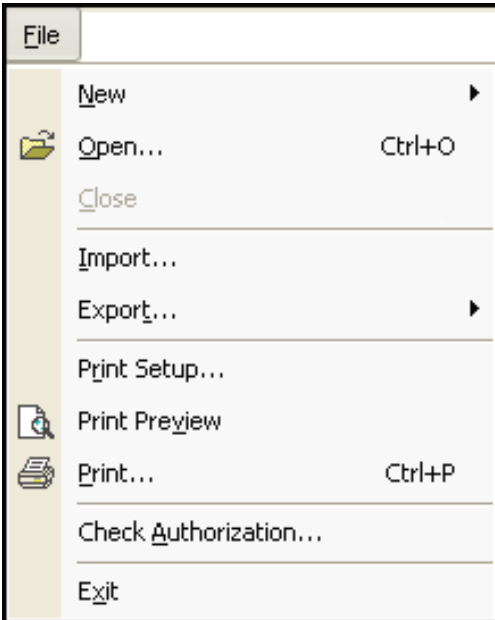
On-Screen Takeoff provides various toolbars for easy access to program actions. Most of the actions on the toolbars are also options available in the program menus. Go to **View > Toolbars**, and place a check next to the toolbars you wish to view on your screen. Hover your cursor over a toolbar icon, and a tool tip revealing a brief description will appear.



Menus

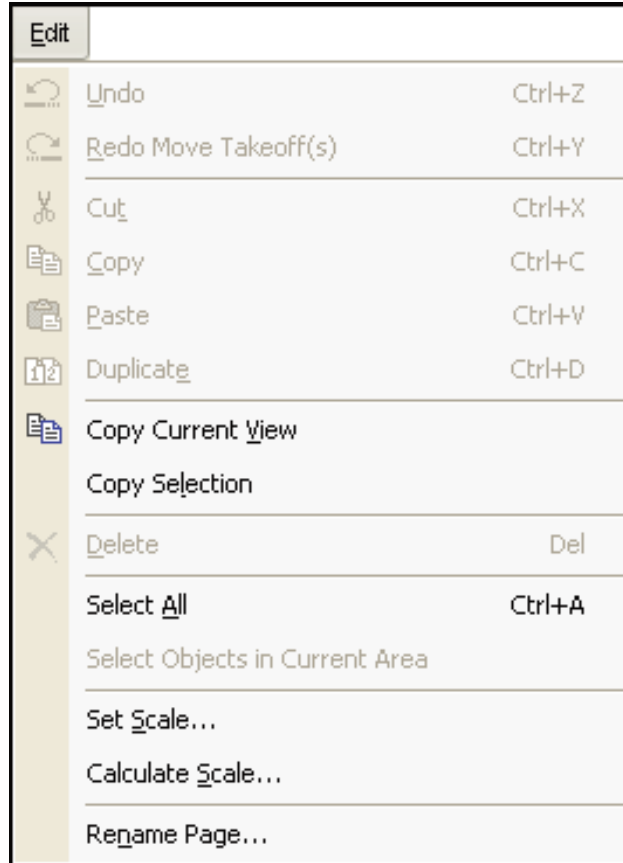
There are nine On-Screen Takeoff menus. Many of the menu commands also appear in toolbars.

File Menu



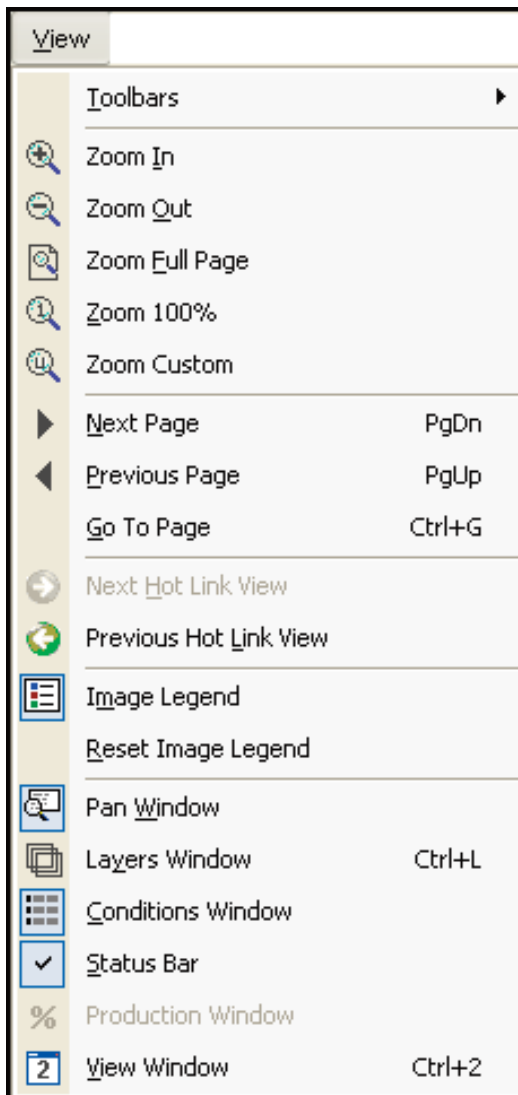
See *File Menu, in Program Help*, for menu option descriptions.

Edit Menu



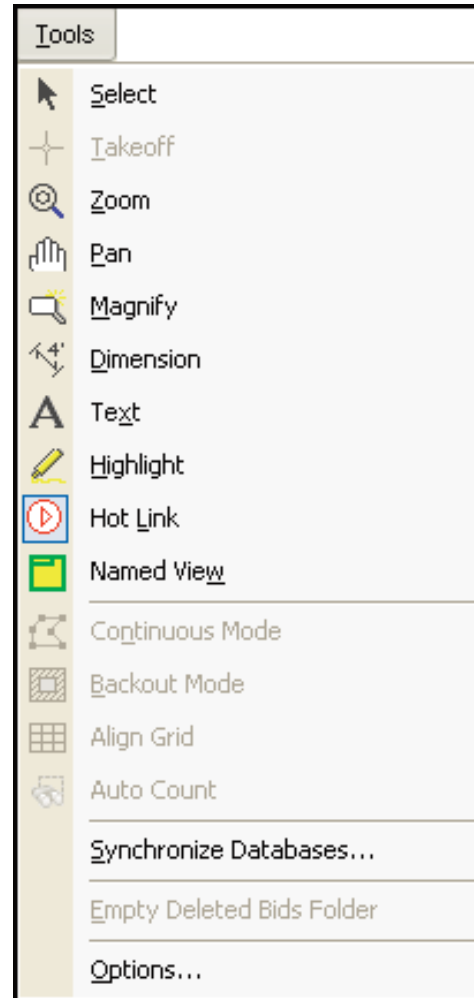
See *Edit Menu, in Program Help*, for menu option descriptions.

View Menu



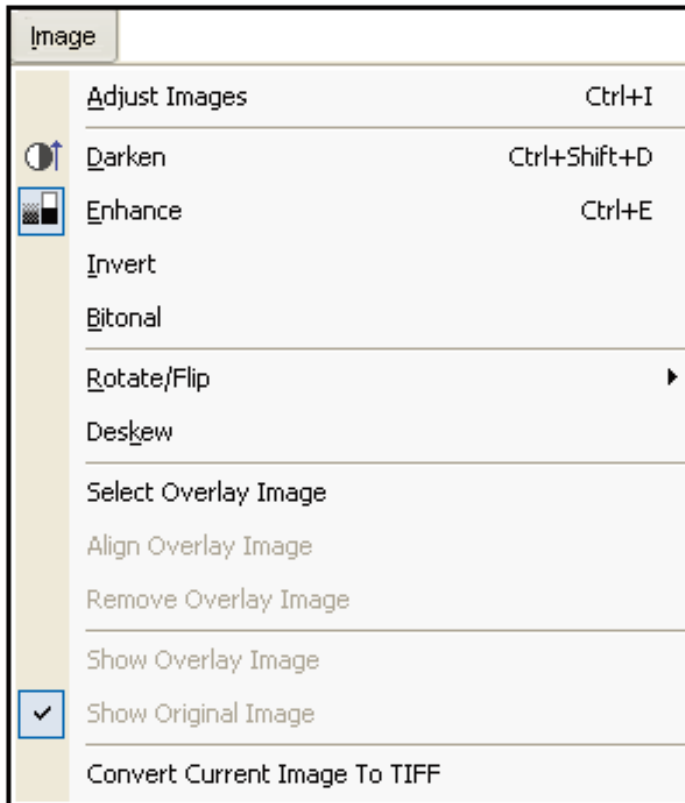
See *View Menu, in Program Help*, for menu option descriptions.

Tools Menu



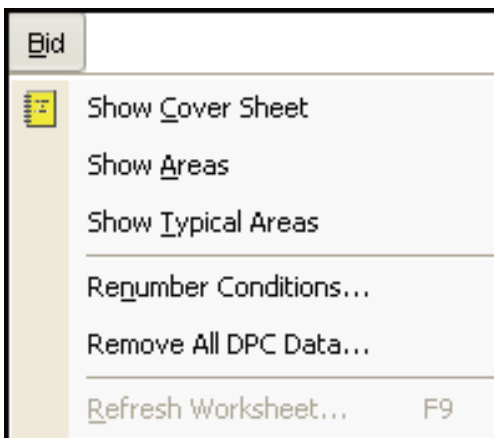
See *Tools Menu, in Program Help*, for menu option descriptions.

Image Menu



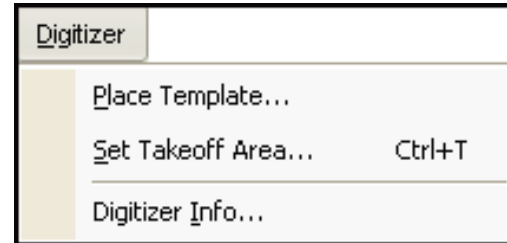
See *Image Menu, in Program Help*, for menu option descriptions.

Bid Menu



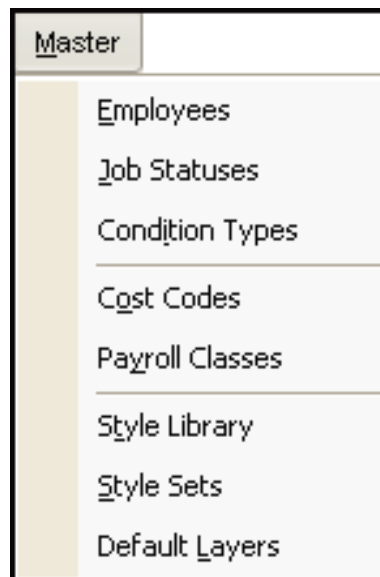
See *Bid Menu, in Program Help*, for menu option descriptions.

Digitizer Menu



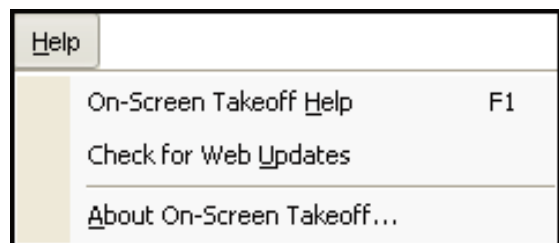
See *Image Menu, in Program Help*, for menu option descriptions.

Master Menu



See *Master Menu, in Program Help*, for menu option descriptions.

Help Menu

















See *Image Menu, in Program Help*, for menu option descriptions.






Shortcuts

Toolbars, Function keys and Combination keys provide quick shortcuts to special features in the program.





Main Toolbar

New	Insert Key	
Open Database	Ctrl + O	
Print	Ctrl + P	
Print Preview		
Cut	Ctrl + X	
Copy	Ctrl + C	
Paste	Ctrl + V	
Duplicate	Ctrl + D	
Delete	Delete Key	
Undo	Ctrl + Z	
Redo	Ctrl + Y	
Cover Sheet	Enter	
Send		
Tell A Friend	Enter	






View

Condition Window	
Hide/Show Pan Window	
Image Legend	
Layers Window	
View Window	







Takeoff

Continuous	
Backout	
Align Grid	
Auto Count	






Annotation

Dimension	
Text	
Highlighter	
Hot Link	
Named View	





Tool Toolbar

Select Mode	Space bar	
Takeoff Mode	Space bar	
Zoom Tool	Ctrl	
Full Page	*	
Magnify		
Pan Tool	Alt	











Zoom

Zoom Mode	Ctrl + Mousewheel	
Full Page	*	
In	Ctrl + L. Click	
Out	Ctrl + R. Click	
100%	/	
Custom		

Navigation

Back		
Forward		
Previous Page	Page Up	
Next Page	Page Down	
Go To Page	Ctrl + G	

Image

Rotate Takeoff Left	
Rotate Takeoff Right	
Flip Takeoff Horizontal	
Flip Takeoff Vertical	
Rotate Image Left	
Rotate Image Right	
Flip Image Horizontal	
Flip Image Vertical	
Darken Plans	
Enhance Plans	



Section 4

Databases


Creating Databases

Creating a database is the essential first step to working with the On-Screen Takeoff program. A database holds all the information for your project. You can choose to have one or many databases. Typically the use of multiple databases improves performance and simplifies information sharing. Smaller databases run faster, and when shared, have fewer files at risk of corruption.

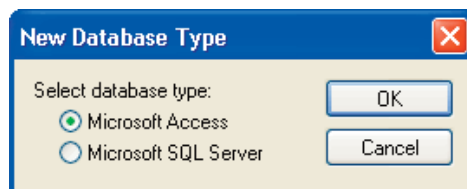
Some clients create a database for each estimator, while others use one for each different geographic location. This helps them use the default settings that match the needs of a particular project.

There are two types of databases: Microsoft® Access and SQL Server™. Determine which you will be using, and follow the directions provided below for creating that type of database.

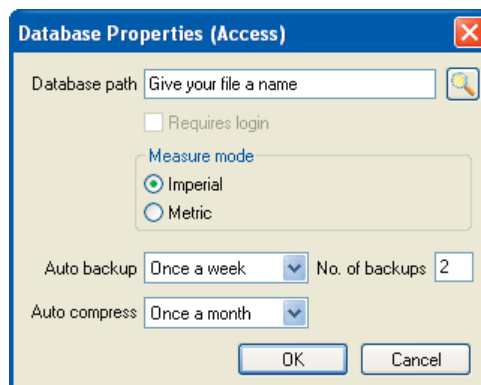
Access Database

1. From the **File** menu, click **New > Database** or click the **New** icon drop down  and click **Database** or right-click anywhere in the Bid window and select **New > Database**.

2. Select database type: **MS Access**, and click .



3. In the **Database Properties** dialog box you will give the database a file name, indicate if login is required, select a measure mode, and set up the auto backup and compress schedules.



- a. Enter a **File name** if you want the database to be saved in the default location. If you want to save the database in a location other than the default, browse to the desired location and enter a file name for your database. When you return to the **Database Properties (Access)** dialog, you will see the file location pathway in the **File name** field.

NOTE: Database names cannot contain \ / : * ? " < > | or ; symbols. The name you give your database will appear in the database list and on your main bids screen.

- b. The **Requires login** box will not be active until after you create the database and add users. If you want to make the database password protected, proceed with the steps to create it then come back to **Database Properties** and check the box for this feature. See [Section 4, Databases, Database Login](#) for more information.
- c. In the **Measure mode** field, select either **Imperial** or **Metric** as the system of measurement to use. See [Section 7, Building & Adding Conditions](#), Units of Measurement for more information. All UOM boxes in the database will be based on the system of measurement you choose.

- d. Select how often you want an **auto-backup**, and indicate the **number of backups** you want to create. At the scheduled time, On-Screen Takeoff will perform the auto-backup upon close of the application. Recommend accepting default.
- e. Select how often, if ever, you want to **auto-compress** the contents of your database to save disc space. Recommend accepting default.
- f. Click **OK**. Your database will now be available and listed on the Bids tab.

SQL Database

WARNING: On Center Software cannot support SQL server setups or assist in the administration or troubleshooting of SQL server configuration. Only staff with knowledge of the server environment and with appropriate expertise in server configuration and administration should perform these actions. In some cases, a server may be configured in a way that would require additional steps not detailed in this process. These instructions are provided as a reference only.

These instructions assume that Microsoft SQL Server (v. 8.0) has already been installed on a server running Microsoft Server 2003, and the server meets the minimum system requirements for SQL Server™.

Brief Overview

- The SQL database will be created from within On-Screen Takeoff.
- Any existing database(s) that you want to synchronize (optional) with the SQL database to be created, must be visible at your Bids tab.
- For security, Windows Authentication should be used in most cases.

Step 1 - Install On-Screen Takeoff at Your Workstation

You do not need to install On-Screen Takeoff on the server. You must have the On-Screen Takeoff application installed at the workstation that you intend to follow these steps on.

Step 2 - Create SQL Database

1. Start On-Screen Takeoff.
2. Once application opens, click **File > New > Database**.
3. **Select Microsoft SQL Server**, then click **OK**.
4. The **Database Properties (SQL Server)** dialog opens.
5. Type the name of your SQL Server in the **SQL Server** field.
6. Select appropriate server authentication under **Connect using**.
7. Type in the **Login name** and **Password**.
8. In the **Database** field, type a name for your database.
9. Choose your **Measure mode** (typically Imperial) and Click **OK**.
10. Your database should now appear at the **Bids** tab.
11. If you had an existing MS Access (*.mdb) database, it should be visible also.

Step 3 - Synchronize SQL Database with Access Database (optional)

If you have an existing database that you want to synchronize with the SQL Database you created during Step 2 please see [Section 4, Databases, Synchronizing Databases](#), for instructions.

Step 4 - Transfer Bids into SQL Database (optional)

If you need to move bids from Access database to the SQL database, you must be able to see both databases in the Bid Navigator.

1. Expand the existing Source database to see bids stored within.
2. Drag and drop the bid(s) from the Source database to the **New** SQL database and release the mouse button. The bid is copied to the new database after you confirm the action.

Step 5 - Archive MS Access Database (optional)

Move the Source database to a folder or CD that is not shared and not visible to On-Screen Takeoff.

NOTE: If you leave the Source database visible, your estimators may accidentally work and create bids in the 'old' database as opposed to creating them in the newly created SQL database.

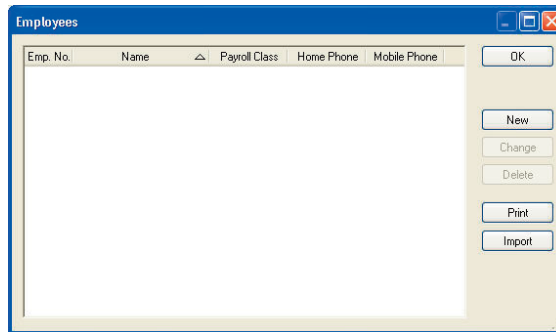
Step 6 - Start Working In Your New SQL Database



You should now be able to create bids in your newly created SQL database. If you require further technical assistance, contact Technical Support at support@oncenter.com or 866-689-5687.

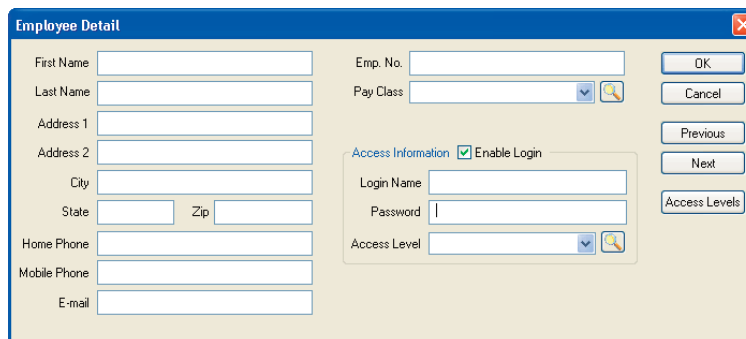
Database Login

If multiple users are using a database, protect that database by setting up **login names** and **passwords** with differing levels of access. This will ensure only employees with approved access can make updates or changes to the bid information.

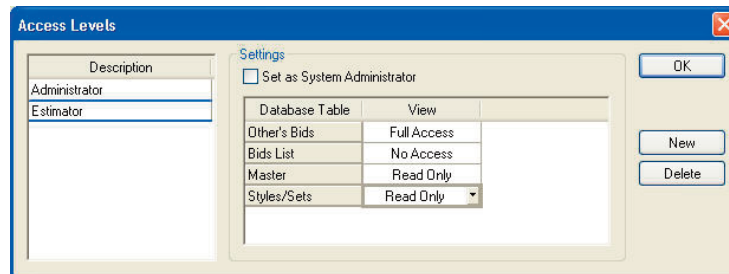
1. Set employee **Login Names, Passwords** and **Access Levels**:
 - a. Go to **Master > Employees**, the **Employees** dialog will appear.



- b. Select , the **Employee Detail** dialog will appear.
 - c. Enter the employee's information and select the **Enable Login** box in the **Access Information** area. This is where the **Login Name** and **Password** is assigned. The  button will now be active.



- d. Click the **Access Levels** button, the **Access Level** dialog appears. Three **Access Levels** can be assigned: **Full**, **No** or **Read Only Access**. The **Administrator** will default to **Full Access** in all areas while others in the **Description** area, such as an **Estimator**, can be assigned differing levels of access.



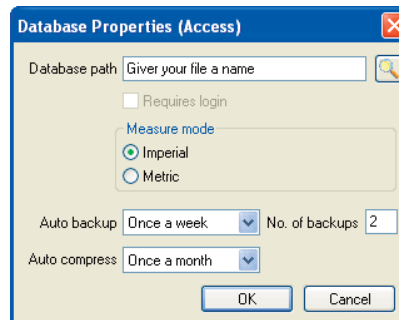
- e. Click **OK** to return to the **Employees** dialog.

NOTE: Repeat steps **A** through **E** for each new employee.

- f. Check the **Employees** dialog to make sure all the employees you added are listed, then

click **OK**.


- From the **Bids** tab, select the **Database** that you wish to require a login, and right-click.
- Select **Properties** from the context menu. The **Database Properties (Access)** dialog appears.



- Click the **Requires Login** box.
- The **Database Login** dialog will appear. The employee will enter their **Login Name** and **Password** and click **OK**. The **On-Screen Takeoff Login** dialog appears.




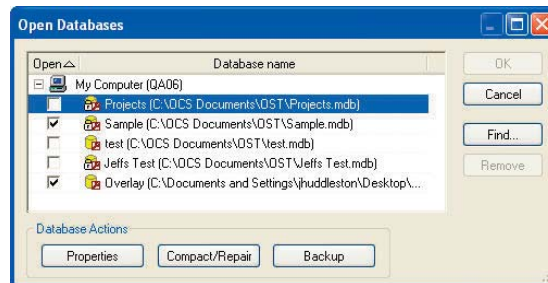
- Enter the **Login Name** and **Password** again. Check the **Remember Login name and Password** box for future logins.

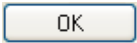
NOTE: In the **Bid** tab, the **Database** icon  will have a lock at the bottom left of the image to indicate login is required.

Opening a Database

More than one database can be stored on your computer or your server, and you can choose which databases appear on your screen. All databases you create will appear in the **Open Databases** dialog.

- Right-click anywhere in the Bids tab window. The **Open Database** dialog will appear. Select **Open**, or click  from the toolbar.
- Place a check in the check box next to the database name(s) you want to open.



- If your database is password protected, type in your **Login Name** and **Password** in the dialog that appears, then click .
- To close a database, so that it doesn't appear on your screen, uncheck the check box next to the database name.

NOTE: When you close a database, you do not lose any information in your bids. Closing the database removes the database from your **Bids** window only. This allows you to see only those databases you are actively using, add can improve application performance.


Synchronizing Databases

Synchronizing databases allows you to take information contained in the **Master menu tables** of one database and put that information into another database. You can also take the **Access Levels** table of one database and put the information into another database.

When synchronizing databases, the database you are taking information from is called the **Source** database, and the database that you are putting information into is called the **Destination** database. Keep in mind that when you synchronize databases, no information is actually removed from the **Source** database, it is only being added to the **Destination** database.

The synchronization process affects databases only and does not affect individual bids. The primary use of the Synchronization feature is so that you can easily create new databases and create all of the tables needed to complete a bid without having to manually input information. Some companies keep a **Master Database** and use this to create new databases, saving a great deal of time.

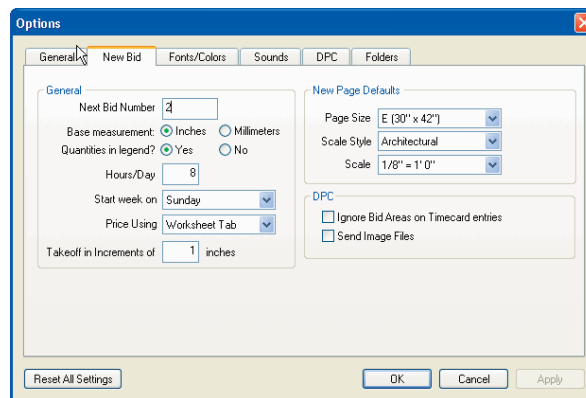
When you synchronize a database, you can either synchronize all of the tables or any combination of tables. Because information from one table may affect information in another table, it is usually best to **Synchronize all Master menu tables**.

1. From the Tools menu, click **Synchronize Databases**. The **Synchronize Databases** dialog appears.
2. Synchronize all Master menu tables by placing a check mark in the box next to **Synchronize all Master** menu tables, or uncheck the box and select only the tables you want to synchronize.
3. Click .
4. When synchronization is complete, you may open the database and begin your project.

Database Default Preferences

To set default preferences for all newly created bids click **Tools > Options > New Bid**. The settings you choose in the **Options > New Bid** tab will apply to all new bids. Changing the preferences here will not affect any bids you have already created.

For information on the other tabs in the **Tools > Options** menu, click on the tab and press **F1** on your keyboard.



New Bid Tab

- **Next Bid Number**-The program automatically generates bid numbers in sequential order. Enter a different value from which to start future bids if you want.
- **Base measurement**-Choose whether you want to use inches or millimeters as the base measurement for your takeoff quantities. Selecting inches will apply standard measurements while millimeters will apply metric measurements to all takeoff quantities.
- **Quantities in legend**-Selecting Yes here will display all takeoff quantities next to their respective icons in the image legend on the Image tab.
- **Hours/Day**-Enter the number of hours in your standard work day. You can enter any number you want.
- **Start week on**-Select the start day of your work week. You can enter any day you want.
- **Price Using**-Select which application to use to price your bid.
- **Takeoff in increments of inches** -Enter a value in inches for the smallest unit of measurement you want to display.
- **Page Size**-Select the page size you want all newly added pages to default to.
- **Scale Style**-Select the scale style you want all newly added pages to default to.
- **Scale**-Select the scale default to apply to new images if not specified within the title.

Section 5

Bids, Alternates & Change Orders

Creating Bids

There are three ways to create a bid. You can either create a new bid from scratch, duplicate an existing bid, or import an existing bid. To import a bid see [Section 14, Importing & Exporting](#).


Creating a New Bid

1. From the **File** menu, click **New > Bid** or

Click the **New** icon drop down  and click **Bid** or

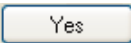
Right-click anywhere in the **Bids** window and from the menu that appears, select **New > Bid** or

Press the **Insert** button on your keyboard.

2. When the **Cover Sheet** appears, type the name of your bid in the **Project Name** field and click . Your new bid appears in the bids list.

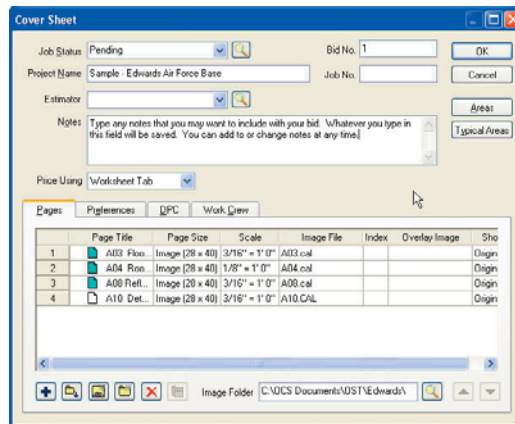
NOTE: When you first create a bid, the only field on the **Cover Sheet** that requires information is the **Project Name** field. There are other fields, however, that you may want to enter information into before you begin your takeoff. For more information about the **Cover Sheet**, refer to [Completing the Cover Sheet](#) in this section.

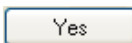
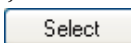
Duplicating an Existing Bid





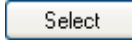

1. To duplicate an existing bid, select the bid, right-click on it, and click **Duplicate**.
2. Click  in the **Duplicate Bid** dialog. The duplicated bid will appear in the **Bids** list with the same name as the original bid.
3. Open the **Cover Sheet**, and change the name in the **Project Name** field.

Completing the Cover Sheet

Every bid, alternate and change order has a **Cover Sheet**. The **Cover Sheet** allows you to create and store bid specific information.



1. Select a **Job Status** from the list, or create a new one.
 - If you want to create a custom job status, type in the name and hit **Enter**. Click  in the dialog box that appears. Click  in the **Job Statuses** dialog.

- To create a new status, in the **Job Statuses** dialog, click  and type in the name.
 - To search for a specific job status, click the **Lookup** icon  to bring up the **Job Statuses** dialog. Scroll through the list and point to the status you want to use, then click .
 - If you know the first letter or two of the status you are searching for, type them in the **Find** field and if there is a status that matches your entry, it will be automatically inserted.
2. Type in a **Project Name** for your bid. You can call your bid whatever you want. This is the only field that is required on the **Cover Sheet**.
 3. Select an **Estimator** from the list, or assign a new one.
 - To search for a specific estimator, click the **Lookup** icon  to bring up the **Employees** dialog box. Scroll through the list and point to the estimator you want to use, then click .
 - To add an estimator, click  fill in the information in the **Employee Detail** dialog.
 4. The **Bid No.** field auto-populates, but can be changed to any unique number you want.
 5. **Job No.** is an optional entry. Your job number can be a number or an alpha-numeric entry.
 6. Use the **Notes** area to type in any notes you may want to include. These notes can be printed in a bid report.
 7. Select the program application you will use to price your bid in the **Price Using** field. For information on **Price Using** see [Section 15, Pricing](#).

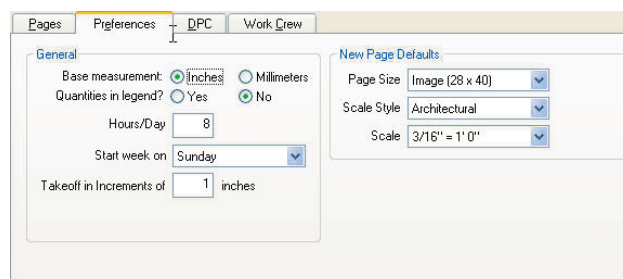
Cover Sheet Tabs

The **Cover Sheet** has four tabs: **Pages**, **Preferences**, **DPC** and **Work Crew**. For most bids, you will only use the **Pages** and **Preferences** tabs.

- **Pages** tab is used to import and change image files used in On-Screen Takeoff. See [Section 6, Images](#), for more information.
- **Preferences** tab allows you to apply settings for a bid. See [Setting Bid Preferences](#) in this section.
- **DPC** and **Work Crew** tabs are used by customers that use Digital Production Control™ (They are addressed separately in the DPC User Guide).



Setting Bid Preferences

Using the **Cover Sheet Preferences** tab to set or modify default preferences affects only the current bid. These modifications do not affect other bids.



1. To apply settings for a particular bid, open the bid's **Cover Sheet** and select the **Preferences** tab.
2. Select or type in your preference for each field.
 - a. **General:**
 - **Base Measurement** - Select **Inches** for imperial measurement or **Millimeters** for metric measurements.
 - **Quantities in legend** - Select **Yes** to show takeoff quantities in Image Legend.
 - **Hours/Day** - Type in the number of hours in your regular work day.
 - **Start week on** - Select in the day your work week starts.
 - **Takeoff in Increments of** - Type in the smallest unit of measure to display.
 - b. **New Page Defaults:**
 - **Page Size** - Select default page size for newly added images.
 - **Scale Style** - Select default scale for newly added images.
 - **Scale** - Select default scale for newly added images.

Creating Alternates and Change Orders

1. From the **File** menu, click **New > Alternate** or **Change Order**.
2. When the **Alternate** or **Change Order Cover Sheet** appears, fill in the name and click . The alternate or change order will appear beneath the base bid.
3. Once you have created conditions, performed takeoffs, and/or generated quantities for your alternate or change order, return to its **Cover Sheet**.
4. Click the **Accepted** box to include alternate or change order **Base Bid Total**.
5. Click  to exit the **Cover Sheet**.

NOTE: Any pages present in the base bid will also appear in the alternate or changer order also.

CAUTION: Deleting a page from the **Alternate**, **Change Order**, or **Cover Sheet** will delete **ALL** takeoff on that page whether it is in the **Base Bid**, **Alternate** or **Change Order**.

Section 6

Images

Adding (Linking) Images to Your Bid




Images or electronic plans are not added directly into a bid or database. The images are added to pages on the **Cover Sheet** and linked to their present location only. If the location of an image changes after you have linked it to your bid, you will need to update the location of the file.

Images are stored on pages on the **Cover Sheet**. There are three ways to link images to your bid:

- From a blank page.
- By inserting a particular image.
- By inserting a group of images.

Adding an Image to a Blank Page


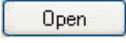
A blank page contains the settings set in **Tools > Options > New Bid**.

1. To link images to your bid, open the **Cover Sheet** and select the **Pages** tab.
2. To link an image from a blank page you will need to create a blank page first. To create or insert a new page on the **Cover Sheet**, select the **Insert New Blank Page** icon .
3. Select  in the **Image File** column to locate the image you want to add.
4. In the **Add Image** dialog, browse for the image you want to link.
5. When you locate the image, select it, and then click . The dialog will close and you will return to the **Cover Sheet** where you will see the image you just linked.

NOTE: You can change the name and set the scale of an image at any time. The page size can only be adjusted immediately after the new page has been inserted. Once an image has been added to a page, you cannot change the page size.


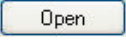
Adding a New Image Page

Using this method, the image will be added using the settings specified by the image file, if available, or the default settings in **Tools > Options > New Bid**.

1. To add a single image using default page size and scale settings, select the **Insert New Image Page** icon .
2. In the **Add Image** dialog appears, browse for the image you want to link.
3. When you locate the image, select it and then click . The dialog will close and you will return to the **Cover Sheet** where you will see the image you just linked.



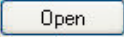
Adding a Group of Images

Using this method, the images will be added using the settings specified by the image files, if available, or the default settings in **Tools > Options > New Bid**.

1. To add a group of images from a particular file, select the **Auto Add Images** icon . In the **Add Images** dialog appears, browse for the location of your images.
2. When you locate the folder containing your images, select only one of the images and click . The dialog will close and you will return to the **Cover Sheet** where you will see all of the linked images of that type from that folder.

Adding Images from a CD-ROM

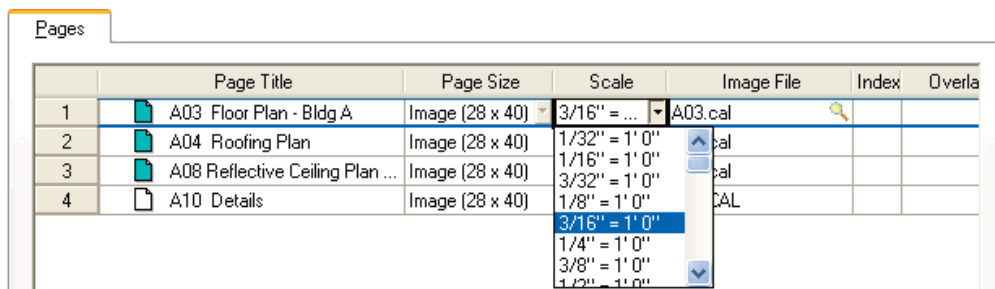
When images are added from a CD, make sure that specific CD of images is in your CD-ROM every time you have this bid open in order for those specific images to be found. You may want to copy the contents to a local or network drive first, and then add them from that location.

1. Select the **Insert New Image Page**  or **Auto Add Images**  icons.
2. In the **Add Image** dialog, browse for the image(s) you want to use.
3. Select the image, click . The dialog will close and you will return to the **Cover Sheet**. You will see the image you just linked to in the **Pages** tab.


Setting and Calculating the Scale of an Image

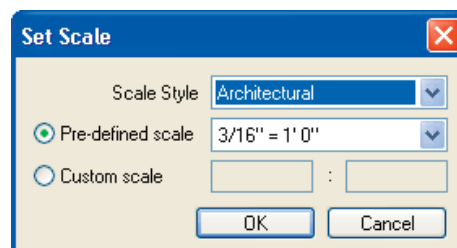
Your set of plans may have different scales for different pages. Each page, however, can only have one scale. There are four ways to set the scale of an image:

- On the **Pages** tab of the **Cover Sheet** (this is usually done when you add an image to your bid).
 1. Open the **Cover Sheet**, **Pages** tab will be displayed.
 2. Select the page you want to set the scale on, and select the scale from the **Scale** field drop down.

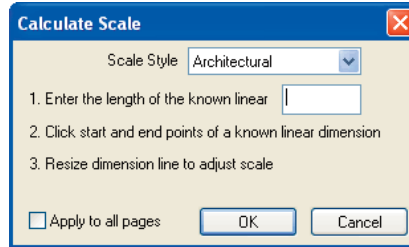


	Page Title	Page Size	Scale	Image File	Index	Overla
1	A03 Floor Plan - Bldg A	Image (28 x 40)	3/16" = ...	A03.cal		
2	A04 Roofing Plan	Image (28 x 40)	1/32" = 1' 0"	cal		
3	A08 Reflective Ceiling Plan ...	Image (28 x 40)	1/16" = 1' 0"	cal		
4	A10 Details	Image (28 x 40)	3/32" = 1' 0"	CAL		

- In the **Scale** field of the **Settings** toolbar on the **Image** tab.
 1. Go to the **Scale** field of the **Settings** toolbar.
 2. Select the scale you want to use from the drop down.
- From the **Edit** menu.
 1. Click **Edit > Set Scale**. The **Set Scale** dialog appears.
 2. Enter your **Scale Style** (Architectural, Civil or Metric).
 3. Select to choose a **Predefined scale** from the drop down, or select do enter a **Custom** scale.
 4. Click .







- Calculating scale with a known linear measurement.
 - From the **Edit** menu, click **Calculate Scale**. The **Calculate Scale** dialog appears.
 - Select a **Scale Style** (Architectural, Civil or Metric).
 - Follow the directions in the **Calculate Scale** dialog.



- Click .

Changing the Image File Path

This method is used to change the file path for each image selected.

- Open the **Cover Sheet, Pages** tab.
- Select the image that needs to be re-directed by clicking it. Multiple images can be selected by holding down the **CRTL** key from the keyboard and clicking the desired images.
- After highlighting all the images you are changing click the **Change Folder** icon .
- In the **Change Folder** dialog, choose the **Path** field (either **Image** or **Overlay**) using the drop down arrow.
- The **Change** field will be populated with the folder path for the selected images from the **Cover Sheet**. This field can also be inputted manually.
- In the **To** field manually type in the new path, or use the **Look Up** button  to browse for the file path.
- Click the  button to change the path for each row selected on the **Pages** tab or inputted manually in the **Change** field. This will process the change and close the dialog box. Clicking the  button will close the dialog box without processing the change.

Printing Images

You must be on the **Image** tab to print images.



- To print an image or images, from the **File** menu, click **Print**, press **Ctrl + P** on your keyboard, or click the **Print** icon  or **File > Print Preview**. The **Print Preview** dialog appears.



- Select a **Range** of pages to print. Print ranges include **Current View (default)**, **Current Page**, **Pages with Takeoff** and **All Pages**.

NOTE: If you select **All Pages** in a large bid, it may take several minutes for the program to cache the images before they display.

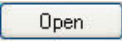
- Select the **Size** you want your image to print in. To print to scale, select **100%**.
- Put a check next to **Show Footer** to show it, or leave blank and the footer will not print.

5. Use the **One page**  or **Multiple pages**  icon to select how many pages to display on the print preview.

NOTE: When in multiple page view mode, you can access the **Crop** check box (This has nothing to do with altering the image as when working with photos). Check this box, select an image to print, and when you print, only the first page will be printed.

Using Overlays

The **Overlay** feature allows you to put addendum drawings over an existing image so you can see any changes. Additions appear in red and deletions appear in blue. Overlay images must be the same size and scale as the original image.

1. Right-click anywhere on the image and click **Select Overlay Image**. The **Add Image** dialog appears.
2. Browse to your addendum drawing, select the file, and click .
3. You will see the addendum drawing laying on top of your original image. The addendum may not line up exactly with the original.
4. To align your overlay drawing to the original, right-click anywhere on the image and click **Overlay > Align Overlay Image**. You will see a line with green circles at either end. Adjust the image until it is predominately grey.

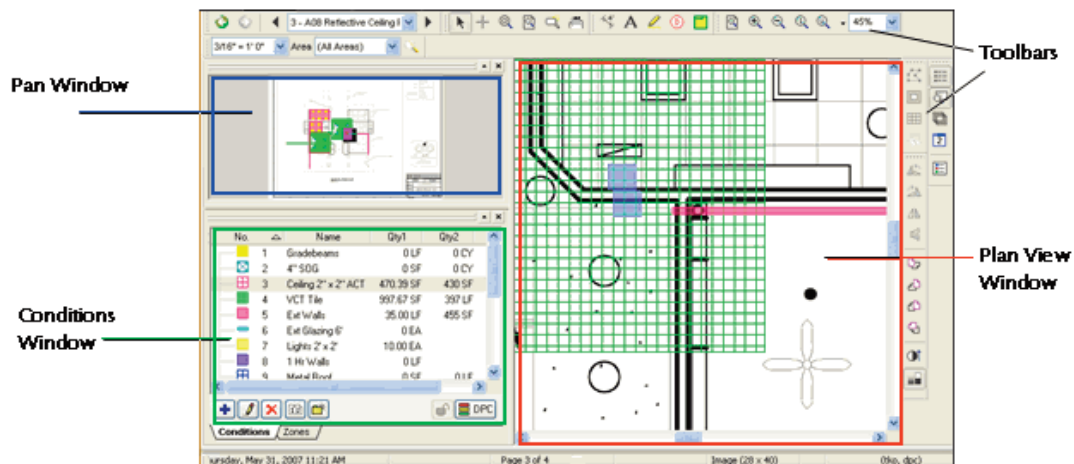


5. Once the images are aligned, you will see the red deletions and blue additions if any, and you can adjust your takeoff as needed.

Navigating Plans


On the **Image** tab you are able to view your conditions and plans side by side. From this tab, there are several features that will help you navigate your plans. They include panning, zooming and paging techniques. These features can be controlled from the toolbars located at the top and right of the screen.

NOTE: The windows and toolbars can be moved around the screen by clicking and dragging from the outer edge of the window or toolbar. You can also set up your screen using the **View** menu or **View** toolbar (click options to add or remove from the screen).



Panning

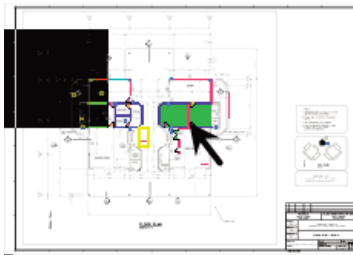
Panning enables mobility of the visual focus in the **Plan View** window. It allows you to move the plans around the screen to view exactly what you want.

1. Select the **Pan** icon  from the **Tools** toolbar.
2. Click and hold on the image in the **Plan View** window.
3. Drag the image to the desired view.

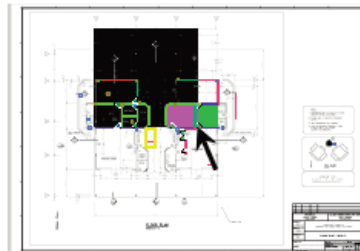
The **Pan** window shows a smaller view of the image in the **Plan View** window. The **View Indicator**, black box, represents what is currently displayed in a zoomed view on the **Plan View** window. The view can also be panned from this window.

1. Click and hold the black region known as the **View indicator**.
2. Drag to pan across the image in the window. The **Pan** window displays what part of the page is visible in the **Plan View**.

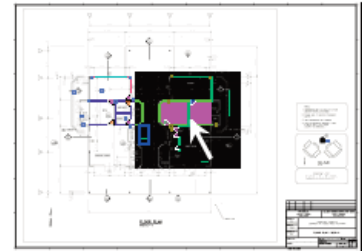
NOTE: From the **Pan** window you can quickly view another area by moving your cursor to the desired location and clicking. Click once to move the closest side of the **View Indicator** to the point you clicked. Double-click to have it centered with your cursor.



position cursor










click once to pan to right side of cursor



double click to center at cursor


Zooming

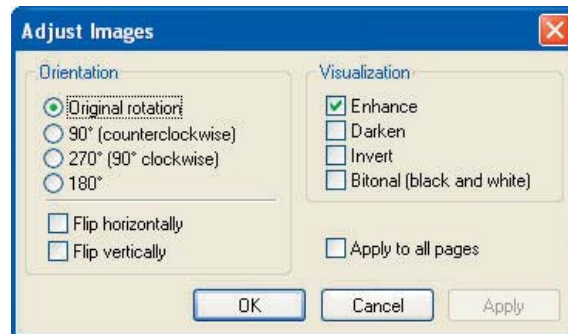
The **Zoom** and **Tools** toolbars provide several different options to enhance the view of your plans. These options are also located in the **View** and **Tools** menus. See [Section 3, Toolbars & Menus, View Menu & Tools Menu](#).

	Zoom In	Zooms in on the current image view in small increments.
	Zoom Out	Zooms out of the current image view in small increments.
	Zoom Full Page	Zooms to a full page view of the current page.
	Zoom 100%	Zooms into a scaled view of the current image view.
 21%	Zoom Custom	Zooms to a customized percentage. User sets the percentage by typing amount or selecting from the drop down list.
	Zoom	This is a tool used to Zoom In or Zoom Out on the page selected. You can use a left-click to Zoom In and right-click to Zoom Out. User can also rope an area to zoom.
	Magnify	This is a tool used to magnify a region of plan without zooming in. Select the tool and click on the area you want magnified.

Adjusting

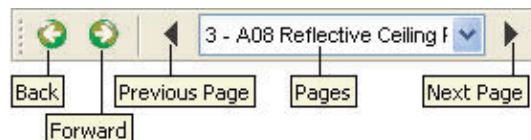
There are times when you may need to adjust how the image of your plans is situated on your screen. You may also need to adjust the image so that it is easier for you to view it-make it darker or lighter. These options will help you view your plans and prepare you to perform takeoff.

1. From the **Image** menu select **Adjust Image** to bring up the **Adjust Images** dialog. You can also adjust images by using the **Image menu** or **Image toolbar**. See *Section 3, Toolbars, Menus & Shortcuts* for more information.
2. Make your selections and click .



Paging

Use the **Navigation** toolbar to go to the various pages or a specified work date in your bid. The **Pages** field indicates what page you are currently viewing. The **Previous Page** and **Next Page** arrows go in sequential order through your plans. The **Back** and **Forward** arrows function like standard MS Windows arrows taking you back and forth through your plans without respect to sequential order.




To make navigating plans easier, you may want to rename your pages with easy-to-recognize names rather than by sheet number.


To rename an **Image** page, from the **Edit** menu, click **Rename Page** and enter the new name. The new name will appear in the **Pages** field of the **Navigation** toolbar and on the **Pages** tab of the **Cover Sheet**.

Using Hot Links and Named Views


Hot Links and **Named Views** provide an easy way to navigate through your project. **Hot Links** are essentially shortcuts between two locations in a set of plans. **Named Views** denote those locations.

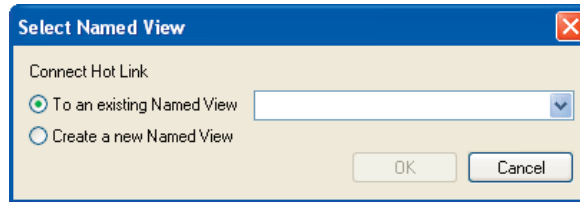
A **Named View** can be an entire page or any part of a page. You can also create a **Named View** for a particular zoom level. A page can have multiple **Named Views**.


1. To create a **Named View**, click the **Named View** icon  and go to the location where you want to create a named view.
2. Place your cursor where you want to start your **Named View** and drag the green box around the area. Remember to zoom in or out as needed before dragging the box.
3. Once you have dragged the box around the selected area, type a name for your view in the upper left corner of the green box. For example, if you need to reference a schedule in your plans, you can create a **Named View** to that schedule and it is one click away at all times.

- To navigate to a **Named View**, click the **Show View Window** icon . A new window will open on your screen. In the **View** drop down field, select the **Named View** you want to see.
- When you select a particular **Named View**, it will appear in the **View** window, you will not be able to perform takeoff, create dimension lines, or create annotations in the **View** window.

A **Hot Link** provides a way for you to quickly jump to a **Named View** from any other page in your bid without having to use the View window.

- To create a **Hot Link**, click the **Hot Link** icon  and click on the page where you want to place the Hot Link. The **Select Named View** dialog appears.



- To connect the **Hot Link** to an existing **Named View**, scroll to the **Named View** you want and click .
- To link a **Hot Link** and create a **Named View** at the same time select the **Create a new Named View** button and create a **Named View** as instructed above. The **Hot Link** and **Named View** will be connected automatically.

To delete a **Named View** or a **Hot Link** select it and click the **Delete** button on your keyboard, or right-click your mouse and select **Delete**.

NOTE: You can choose whether Named Views open in the same window as your takeoff or in a separate View window. To open a Named View in the same window as your takeoff, from the Tools menu, click Options and uncheck the Open hot links in separate View Window button. By default, On-Screen Takeoff opens views in a separate **View** window.



Section 7

Building & Adding Conditions

Building and Adding Conditions

A condition is a description of an object such as a floor, wall, door, etc. A condition contains all of the information about a particular object. The four styles of conditions in On-Screen Takeoff are **linear**, **area**, **count** and **attachment**. There are four ways to add a condition(s) to your bid:

- Create a condition from scratch.
- Duplicate an existing condition.
- Bring a condition in from the **Style Library**.
- Bring in a group of conditions from a **Style Set**.

NOTE: The next few sections will cover how to create a condition from scratch, how to duplicate an existing condition, and how to define condition properties for the various **Condition Styles**. See [Section 12, Condition Styles & Style Sets](#) for more information.

Units of Measurement (UOM)

On-Screen Takeoff can accommodate both Imperial and Système International (SI)-metric in the United States. When you create a database, choose which system of measurement to use. All UOM boxes in the database will be based on the system of measurement you choose.

Imperial UOMs		Metric/Système International (SI) UOMs	
EA	Each	EA	Each
IN	Inches	mm	Millimeters
LF	Linear-Feet	mm ²	Square-Millimeters
LY	Linear-Yards	m	Meters
IN ²	Square-Inches	m ²	Square-Meters
SF	Square-Feet	mm ³	Cubic-Millimeters
SY	Square-Yards	m ³	Cubic-Meters
SQ	Square (Roofing)	The roofing industry works with a unit called a Square which equals 10' x 10' or 100 SF. A roofer's square is 100 SF. There is no metric equivalent in the roofing industry and a Square is usually considered an Imperial only unit. The metric equivalent of 1 SQ is 9.290304 SQ Meters.	
CF	Cubic-Feet		
CY	Cubic-Yards		

NOTE: When entering height, the last two digits that you type will always calculate inches. For example: 824 will be 8' 24" (10'), 10 will be 10" and 1010 will be 10' 10". If using the metric system, **all** measurements are entered and stored as millimeters

Condition Quantities

The chart below defines quantities available for linear, area, count and attachment style conditions. You will establish **Quantities** for your conditions in the **Condition Properties** dialog > **General** tab > **Results** area. See [Linear, Area, Count and Attachment Conditions](#) throughout this section for more specifics on each condition style.


LINEAR QUANTITIES	DEFINITIONS
Length	The total length of takeoff from one point to another expressed in linear feet, inches or yards.
Segment Count	The number of linear segments per page per takeoff.
Surface Area (Single Side)	The left or right side of a linear condition. Height x length. Expressed in square feet, inches, yards or roofing square.
Surface Area (Both Sides)	The left and right side of a linear condition. Height x length x 2. Expressed in square feet, inches, yards or roofing square.
Surface Area (Top OR Bottom)	The track or plate surface area of the linear condition. Thickness x length. Expressed in square feet, inches, yards or roofing square.
Surface Area (Top AND Bottom)	The track and plate surface area of a top or bottom of the linear condition. Thickness x length x 2. Expressed in square feet, inches, yards or roofing square.
Surface Area (Single End)	The end cap of the linear condition. Height x thickness. Expressed in square feet, inches, yards or roofing square.
Surface Area (Both Ends)	Both end caps of the linear condition. Height x thickness x 2. Expressed in square feet, inches, yards or roofing square.
Surface Area (All Side/Duct)	The top, bottom and two side without the end caps. (Thickness x length x 2) + (height x length x 2). Expressed in square feet, inches, yards or roofing square.
Volume	The amount of mass of a linear object with thickness and height. (Condition height x condition thickness) x total condition length. Expressed in cubic feet or yards

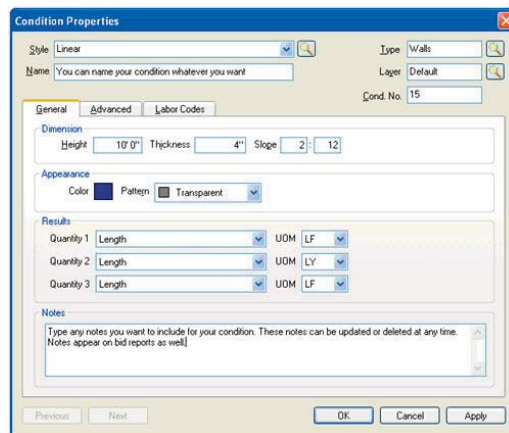
AREA QUANTITIES		DEFINITIONS	
Area		The surface area of an area condition, reduced by backouts. Expressed in square feet, inches, yards and roofing square.	
Area (Minus Attachments)		The surface area of an area condition, with the attachments backed out. Expressed in square feet, inches, yards and roofing square.	
Perimeter		The linear measurement around the condition. Expressed in linear feet, yards or inches.	
Perimeter (Without Backouts)		The linear measurement around the area condition, without backout perimeters. Expressed in linear feet, yards and inches.	
Perimeter (Plus Attachment)		The linear measurement around area including linear measurement around any attachments added to that particular area condition. Expressed in linear feet, yards or inches.	
Grid Length (Visible)		The linear measurement of grid lines with the Grid property selected. It does not include any perimeter. Expressed in linear feet, yards or inches.	
Tile Count (Average)		The count of tiles created when Grid property is selected. $(\text{Square foot of area condition}) \div (\text{Square foot of tile})$. Expressed as an each count.	
Tile Count (Visible)		The count of tiles when Grid property is selected. The actual count of tiles due to the grid alignment. Counts each partial or complete tile as one whole tile. Expressed as an each count.	
Area Counts		The count of how many times an area condition occurs per takeoff page.	
Volume		The amount of mass of an area condition. Thickness x surface area.	
Volume (Minus Attachments)		The amount of mass of an area condition with attachments included. Thickness x surface area – volume of the attachment.	
COUNT QUANTITIES		DEFINITIONS	
Count		The number of times the count condition is found on the drawing. Expressed as an each count.	
Total Height		The linear measurement vertically of all count conditions added together. Expressed in linear feet, yards or inches.	
Perimeter		The linear measurement around the area of the count condition. Expressed in linear feet, yards or inches. Circle: width as the diameter. Triangle: width as the length of one side of an equilateral triangle. Expressed in square feet, inches, yards or roofing square.	

COUNT QUANTITIES	DEFINITIONS
Surface Area (Top OR Bottom)	The upper or lower surface area of a count condition depending upon the shape selected. Square: width^2 Rectangle: $\text{width} \times \text{depth}$.
Surface Area (Top AND Bottom)	The upper and lower surface area of a count condition depending upon the shape selected. Square: $\text{width}^2 \times 2$. Rectangle: $\text{width} \times \text{depth} \times 2$. Circle: $\text{width as the diameter} \times 2$. Triangle: $\text{width as the length of one side of an equilateral triangle} \times 2$. Expressed in square feet, inches, yards or roofing square.
Surface Area (Single Width Side)	One width surface area of a count condition. $\text{Height} \times \text{width}$. Available when using squares, rectangles and triangles for the shape. Expressed in square feet, inches, yards or roofing square.
Surface Area (Both Width Sides)	Two width surface areas of a count condition. $\text{The height} \times \text{the width} \times 2$. Available when using square or rectangle shapes. Expressed in square feet, inches, yards or roofing square.
Surface Area (Single Depth Side)	One depth surface area of a count condition. $\text{The height} \times \text{depth}$. Only available when a rectangle is the shape. Expressed in square feet, inches, yards or roofing square.
Surface Area (Both Depth Sides)	Two depth surface area of a count condition. $\text{The height} \times \text{depth} \times 2$. Only available when using a rectangle as the shape. Expressed in square feet, inches, yards or roofing square.
Surface Area (All Sides)	The surface area of all width and depths combined. Square: $\text{height} \times \text{width} \times 4$. Rectangle: $(\text{height} \times \text{width} \times 2) + (\text{height} \times \text{depth} \times 2)$. Triangle: $\text{height} \times \text{width} \times 3$. Circle: $\text{circumference} \times \text{height}$. All are expressed in square feet, inches, yards or roofing square.
Surface Area (Sides, Top, Bottom)	The surface area of all width, top, bottom and depths combined. Square: $(\text{height} \times \text{width} \times \text{four}) + (\text{width}^2 \times 2)$. Rectangle: $(\text{height} \times \text{width} \times 2) + (\text{height} \times \text{depth} \times 2) + (\text{width} \times \text{length} \times 2)$. Triangle: $(\text{height} \times \text{width} \times 3) + (\text{width}^2 \times \frac{1}{2}) \times 2$. Circle: $(\text{circumference} \times \text{height}) + (\text{width} \div 2)^2 \times \pi \times 2$. Expressed in square feet, inches, yards or roofing square.
Volume	The amount of mass of a count condition. The height x width and/or depth depending on the selected shape. Expressed in cubic feet and cubic yards.

ATTACHMENT QUANTITIES	DEFINITIONS
Count	Number of attachments per page of takeoff expressed as an each count.
Perimeter (Top + Both Sides)	The linear measurement of doors. The (height x 2) + width. Expressed in linear feet, inches or yards.
Perimeter (Four Sides)	The linear measurement of linear attachments. If the attachment is a door, window, or opening: (height x 2 + (width x 2)). Expressed in linear feet, inches or yards.
Surface Area (Single Width Side)	The surface area of attachment on one width side. Width x height. Expressed as square feet, inches, yards or roofing square.
Surface Area (Both Width Sides)	The surface area of attachment on two width side. Width x height x 2. Expressed as square feet, inches, yards or roofing square.


Creating a Condition from Scratch

- To create a condition from scratch, click the **New Condition** icon  in the **Condition List** or
Right-click anywhere in the **Condition List** and select **New > Condition** or
Press the **Insert** button on your keyboard. The **Condition Properties** dialog appears.



- Define properties for your condition. See *Condition Properties* for more information.

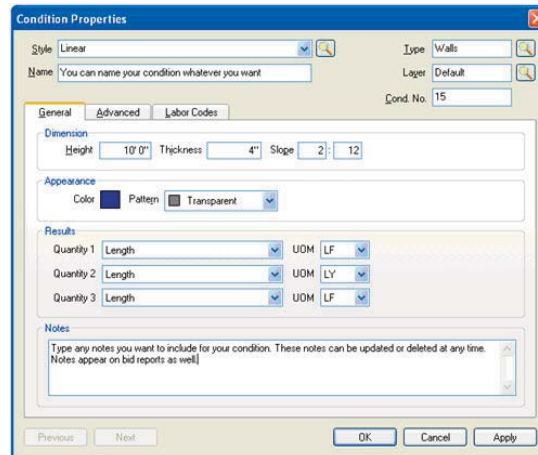
Duplicating an Existing Condition

- To duplicate an existing condition, select the condition and click the **Duplicate** icon  or
Right-click a condition and select **Duplicate** or
Select the **Condition** and press **Ctrl D**. The **Condition** will be duplicated and placed under the original in the **Condition List**.
- Rename and reconfigure it as needed. See *Condition Properties*, for more information.

Condition Properties

Define properties for your conditions in the **Condition Properties** dialog.

1. Highlight the **Condition** from the **Condition List**.
2. Double click to open the **Condition Properties** dialog.



3. Select the **Style** of your condition. The condition can be **Linear**, **Area**, **Count** or **Attachment**.
4. Create a **Name** for the condition. Some examples are walls, double doors, a metal roof, etc. It is recommended that you match the condition name as closely to the description of the object being taken off. For examples, "10' 6" TYPE A GWB WALL" is more easily identifiable than "INT WALL".
5. Select a **Type**. This is optional, but recommended.
6. Define **Layers** by selecting from the list or use the default. See [Section 13, Layers](#) for more information.
7. A **Cond. No.** is assigned automatically in sequential order, but it can be changed if you prefer.
8. Set properties on the **General** and **Advanced** tabs. Settings on these tabs will be different for each type of condition.

NOTE: The **Labor Cost Code** tab is used in conjunction with Digital Production Control™ (This tab is addressed in the DPC User Guide).

Linear Conditions

Linear conditions describe an object such as a wall, footing, curb, piping, wiring, etc., that requires a linear measurement. In order to

General Tab

Dimension measurements are inputted in number of inches or using standard notation. For example, an entry of 805 will appear as 8'5".

1. Enter a **Height** measurement.
2. Enter a **Thickness** measurement.
3. Enter a **Slope** measurement (rise over run) if applicable.

NOTE: When entering height, the last two digits that you type will always calculate inches. For example: 824 will be 8' 24" (10'), 10 will be 10" and 1010 will be 10' 10". If using the metric system, **all** measurements are entered and stored as millimeters.

Appearance settings help distinguish takeoffs on your image. They will be referenced on your **Conditions** list and in your **Image** legend. See *Section 10, Performing Takeoff, Using the Legend.*

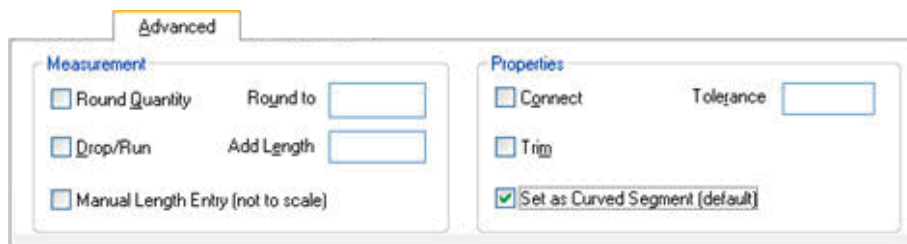
1. Select a **Color** for each condition object.
2. Select a **Pattern** for each object.

Results set the quantity. There are three quantity areas available. See the *UOM chart* at the beginning of this section for more information on measurements.

- The **Quantity 1** default is LF (linear feet), but you can also select LY (linear yards) or IN (inches).
- The **Quantity 2 and 3** fields allow you to break out other measurements for your object. For instance, you may want to calculate the area of a wall. Select the measurement you want from the menu and On-Screen Takeoff will calculate the measurement for your object.

Notes allow you to include additional information for your condition. These notes can be updated at any time and appear on bid reports.

Advanced Tab



Measurement provides for additional parameters for your takeoff. You can round measurements to the nearest whole number increment, set additional drop/run lengths for wire or pipe, and manually enters takeoff lengths respectively.

- **Round Quantity** - All measurements will be rounded to nearest increment indicated if box is checked.
 - o **Round to** indicates increment to round to.
- **Drop/Run** adds additional length (primarily used for electrical and plumbing). If checked and left blank, it allows you to manually enter a drop/run value for each segment to be taken off.
 - o **Add Length** - Enter drop/run value.
- **Manual Length Entry (not to scale)** – if box is checked, the length will need to be manually entered after takeoff. Keep in mind, it is not to scale.

Properties provides for additional settings for connecting the corners of two takeoff segments, having a takeoff segment connect to a crossing segment, and defaulting all segments to give you the ability to set them as curves as needed.

- **Connect** - Check box to have the program connect takeoffs within the tolerance indicated.
 - o **Tolerance** - Enter a tolerance value.
- **Trim** - Select to trim a takeoff to an adjoining takeoff.
- **Set as Curved Segment (default)** - Check to be able to set a curve for any segment of this takeoff.

Area Conditions

Area conditions describe an object such as a slab, ceiling, floor, roofs, etc. that requires a measurement for total area. In addition, you can set the thickness for area conditions giving you a volume measurement for objects such as slabs.

General Tab

In the **Dimension** area, you can apply a measurement for thickness and slope.

- **Thickness** is the measurement used primarily to determine the volume of concrete slabs.
- **Slope** is used primarily for roof takeoffs. Enter a slope value to ensure correct area measurement.

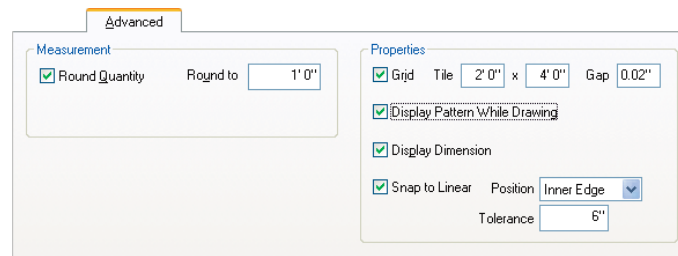
Appearance sets color, pattern and spacing for condition objects in your takeoff.

- **Color** can be set or changed by clicking in the box, then selecting from the Color dialog that appears.
- **Pattern** is set by clicking the drop-down arrow to select from the list of options.
- Enter a measurement to set the **Spacing** to be used in non-solid and non-transparent patterns. Spacing allows you to adjust the size of the pattern layout.

Results select how you want your measurement to appear. Each **Quantity** has a default UOM setting. Please refer back to the [UOM chart](#), located at the beginning of this section, for more options. The **Results** area of the **area** conditions is much the same as the **linear** conditions where the fields allow you to break out other measurements for your object. Here are two examples:

- **Tile Count (Average)** – Calculates the number of tiles based on area and tile size. For example, for an area of 800 SF with a tile size of 8 SF (ex. 2 X 4 Acoustical Tile) will result in a tile count of 100.
- **Tile Count (Visible)** – Calculates the number of tiles based on grid alignment and orientation rather than on area and tile size. While this will add waste to your takeoff, it can be helpful in more accurately projecting labor and material needed if an architect or owner calls for a specific installation of your materials. When you take off the grid, it uses a generic layout. To line up your grid with the plans, you must use the **Align Grid** feature of the program. If you do not use **Align Grid**, the count will be based on the initial layout and orientation upon takeoff. See [Section 7, Building & Adding Conditions, Area Conditions, Advanced Tab, Aligning a Grid](#).

Advanced Tab



Measurement allows you to set a value to round measurements to the nearest whole number increment.

1. Select the **Round Quantity** box to apply this feature.
2. Enter a value to the **Round to** field. Each segment of the condition will be rounded to the nearest increment indicated. For example, if you round to the nearest foot, all takeoff segments for your area, that is-each individual perimeter line- will be rounded to the nearest foot. Be careful when rounding, as it can have a large impact on your quantity.

The **Properties** field allows for the measurement of areas (i.e. ceiling and floor tiles). **Quantity** results on the **General** tab play a critical role in analyzing the values created as a result of **Properties** field entries.

1. Check **Grid** and type a numeric value for **Tile** and **Gap** sizes. This will create a grid pattern at the specified size for all takeoff objects. The gap setting will cause the program to visually place the specified measurement in between each grid that is inside the area.
2. Check **Display Pattern While Drawing** to display the grid as it is being drawn. If the box is unchecked the pattern will only be displayed after the area is drawn.
3. Check **Display Dimension** to show (on the **Image** view) the **Quantity 1** result for each area object that is taken off. When this is checked, each individual area takeoff object for this condition will display the dimension in the center of the object.
4. Check **Snap to Linear** and choose a **Position** from the following choices:
 - **Inner Edge** – places the area object’s perimeter on the inner-most edge of the closest parallel linear takeoff object.
 - **Center** – places the area object’s perimeter on the center of the closest parallel linear takeoff object.
 - **Outer Edge** – places the object’s perimeter on the outer-most edge of the closest parallel linear object.
5. Set **Tolerance** for the distance that the snap to linear feature uses to snap the area takeoff to the linear takeoff. For example, if you had this set to 1' 6", then anytime your area takeoff got within 1'6" of the linear takeoff, it would automatically snap the area takeoff to the linear takeoff.

Count Conditions

Use **count** conditions when you want to count the number of instances of a specific object, such as a footing or column. The **Advanced** tab is not available for count conditions.

General Tab

Dimensions of the object can be used to calculate square footage and volume if needed.

1. Enter a **Height** measurement.
2. Enter a **Width** measurement.
3. Enter a **Depth** depending on the shape selected.

Appearance sets color, pattern and spacing for condition objects in your takeoff.

1. Select a **Color** for the object.
2. Select a fill **Pattern** for the object.
3. Select a **Shape** for the object.

Results will calculate up to three results automatically depending on your condition style.

- **Quantity 1** field will default to the specific measurement type for that condition. You can change the result types by scrolling down the list and selecting whichever result you want. Quantities reflect size and dimension.
- **Quantity 2** and **Quantity 3** fields can be selected from the result list. A UOM field will appear for you to select a type of measurement. Count results are limited to UOM EA only.

NOTE: See [Section 10, Performing Takeoff, Auto Count](#) for information on additional program features available to automatically find and count multiple occurrences of a selected item/object.

Attachment Conditions

Attachment conditions are **count** conditions that require a **parent** condition. The parent condition could be a linear condition such as a wall for attaching doors and windows or an area object such as a ceiling for attaching skylights or light fixtures.

Set up attachment conditions as you would a regular count condition. The primary difference in the setup of an attachment condition is that the shape you choose for your attachment condition will determine the possible selections in the **Results Quantity** fields. The results differ depending on the shape you choose.

General Tab

Dimensions of the object can be used to calculate height and width if needed.

1. Enter a **Height** measurement.
2. Enter a **Width** measurement.
3. Enter a **Depth** depending on the shape selected.

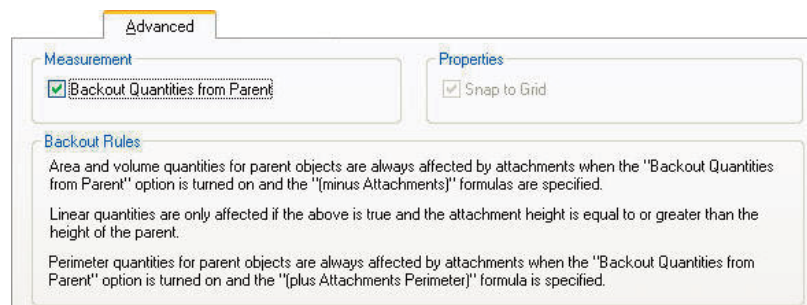
Appearance sets colors and patterns for the objects in your takeoff.

1. Select a **Color** for the object.
2. Select a fill **Pattern** for the object.
3. Select a **Shape** for the object. This step is important because it determines how the attachment can be used as well as the **Results** that will be available.

Results will calculate up to three results automatically depending on your condition style.

- **Quantity 1** field will default to the specific measurement type for that condition. You can change the result types by scrolling down the list and selecting whichever result you want. Quantities reflect size and dimension.
- **Quantity 2** and **Quantity 3** fields can be selected from the result list. A UOM field will appear for you to select a type of measurement. **Count** results are limited to UOM EA only.

Advanced Tab



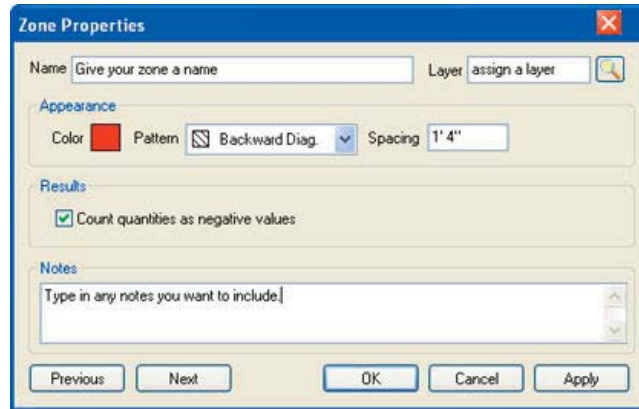
1. Check the **Backout Quantities from Parent** box in the **Measurement** area if you want to deduct the attachment object quantity from the parent. Note the **Backout Rules** area in the **Attachment Condition**, under the **Advanced** tab.
2. Check the **Snap to Grid** box, in the **Properties** area, to have the attachment takeoff object snap to the grid in the parent takeoff.
3. In the **Notes** field:
 - Once attached, **attachments** move with their parent object. If you attempt to align a grid-based takeoff that contains attachments, it must be able to fit into the area they are being rotated within.
 - If an attachment is intended to deduct a quantity from the parent condition, the attachment must have **Backout Quantities (default) from Parent** enabled in the **Measurement** area of the **Advanced** tab.
 - If you are having trouble getting attachments to affect quantities, verify that the above two items have been taken into consideration.

Zones

Zones are area objects drawn on the **Image** tab and are used to group conditions that have been taken off for viewing or pricing. **Zones** can be set up by floor, wing, phase, etc. You can sort your conditions by zone on the **Takeoff** tab by right-clicking anywhere in the **Takeoff** tab window and selecting **Group by Zone**.

NOTE: **Zones** cannot overlap, **Zones** cannot be created within another zone, **Zones** can dissect a takeoff object, and **Zones** cannot be exported to estimating software.

1. To **create** a zone, click the **Zones** tab in the **Condition Window**.
2. Click to bring up the **Zone Properties** dialog.
3. Type in a name for your zone and assign it to a layer.



1. To **draw** a zone, click the **Select** tool , then click on the zone you want to use.
2. Click on the screen where you want to begin the zone, click each corner as you draw the zone.
3. Double-click the last corner to close out the zone.
4. To move or resize a zone, see [Section 10, Performing Takeoff, Moving objects and Resizing Linear and Area Objects](#).

NOTE: You can set a zone to *negative* to change all takeoff inside the zone to *negative quantity*. This is useful for **Change Orders** and **Alternates**.

NOTE: Zone information will not be shared with your bidding software.



Section 8

Bid Areas

Creating Bid Areas


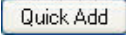
Bid areas are defined locations within a single bid like buildings, floors, levels, wings, phases, zones or rooms. Area names generally refer to the contract drawings. The estimator has full control over what areas are called.

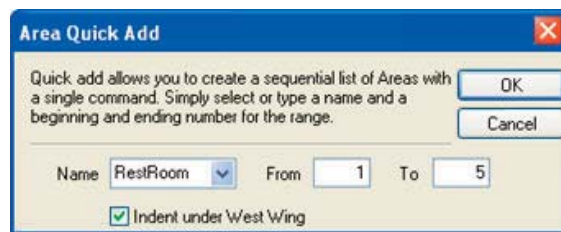
On-Screen Takeoff uses areas to allocate costs associated with these specific locations. Reports can then be generated to display information and quantities for each specific building area that has been defined. Follow the steps below to create a bid area.

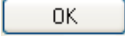





NOTE: You must create bid areas if you want to create typical areas. See *Section 10, Typical Areas* for information about typical areas.

1. Select  on the **Cover Sheet**. The **Bid Areas** dialog appears.



2. To add a new area, select  and enter the name of your area.
3. To add multiple subsets to an area, select  and select a name from the **Area Quick Add** dialog drop-down list, or type in the name for the area you want to create.




4. Type a range in the **From** and **To** fields such as 1 to 3 and click .
5. To move areas left or right to indent or outdent, highlight the desired area and select either  or .
6. To move areas up or down in the list, select  or  as desired.
7. To delete an area, highlight the desired area and click . This can only be done if the area is not in use.

Assigning Takeoff to a Bid Area

You can create your takeoffs first or you bid areas first, or you can go back and forth. Once you have your Takeoff completed and you have set up your bid areas, you can then assign your takeoff to a particular bid area.

Assigning Takeoff Objects to Bid Area After Takeoff is Completed

1. To assign takeoff to a bid area, from the **Settings** toolbar **Area** drop-down menu on the **Image** tab, select the area you want to assign takeoff to.
2. When you first do this, you will notice that all of your takeoff has grayed out, this means that there is no takeoff assigned to your selected bid area yet.
3. With your preferred area showing in the **Area** drop-down menu, use the **Select** tool  and select the takeoff you want to assign to that area. You can do this one segment at a time or by selecting a takeoff object, or by pressing the **Shift** key on your keyboard and selecting multiple objects or right-clicking on a condition and select the objects.
4. Once you have your takeoff objects selected, right-click and select **Assign to Current Area**. Repeat this process for all takeoff objects you want to assign to a particular bid area.

Assigning Takeoff Objects to a Bid Area Before You Begin Takeoff

You can assign takeoff to a bid area before you begin takeoff.

1. To do this, select an area from the **Settings** toolbar **Area** drop-down menu.
2. Next, select a condition from the **Condition List** and begin takeoff.
3. Any takeoff you perform will be assigned to the current area, which is visible in the **Area** drop-down field.

NOTE: If you don't want to assign takeoff to an area as you create the takeoff, select **(All Areas)** in the **Area** drop-down menu. This will cause all takeoff that you complete after this point to be unassigned.



Section 9

Typical Areas

Typical Areas

A project can have several conditions that, when combined together, create a typical area like apartment units, hotel suites, townhouses and lobby areas. The **Typical Area** feature allows estimators to assign a count for each typical unit within a building or project and will only have to perform the takeoff for that one unit. The takeoff quantity assigned to a **Typical Area** will be multiplied by the number of **Typical Areas**. When properly entered, On-Screen Takeoff will split out your reports for each typical unit, each floor, each building, or report a grand total for the bid.

Creating Typical Areas

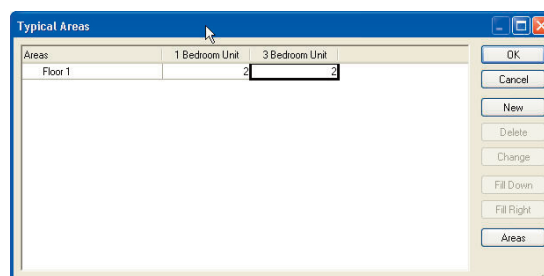
To set up an estimate using **Typical Areas**, you must first set up **Bid Areas** for the project. See [Section 8, Bid Areas](#) for more information.

1. From the **Cover Sheet**, select **Typical Areas**. The **Typical Areas** dialog will now appear.
2. Click **New** and type in a name for your new typical area. For example, type "bathroom".
3. Click **OK** to accept the name.
4. Repeat this for each typical unit that needs to be defined.
5. Enter the appropriate counts for each area.
6. Click **OK** to close the **Typical Areas** dialog.

Since a **Condition Detail** is restricted to just one height, you can consider tagging your **Typical Areas** with a height value. Example: Apt. 2B – 8-6", Apt. 2B – 10-". This will help you if your bid has multiple deck heights or if specific wall types require separate conditions of each height of the same wall.

After creating your **Typical Area** names, you now have a grid showing the **Bid Areas** and the Typical Areas that have been defined. Within the cells under each column you note how many times a Typical Area occurs within each Bid Area. This will now calculate your quantities using the number of Typical Areas that occur within each Bid Area. This feature is invaluable in saving time when taking off a job that has many recurring rooms, systems or objects.


Be mindful of the height when entering these quantities. When this step is completed, On-Screen Takeoff will have a total count of each **Typical Unit**, a breakdown for each floor, and a total for each building.



In the example dialog above, there are two 1 bedroom units and two 3 bedroom units on the 1st floor. Any takeoff defined as a 1 bedroom unit will now be factored by 2 within **floor 1** and will continue to factor the quantities out based on the number of times noted for each **Typical Area**.

1. Click the **Fill Down** button to repeat a count down the rows (bid areas).
2. Click the **Fill Right** button to repeat the count across columns (typical areas).
3. Once complete, click **OK**.

Assigning Takeoff Objects to a Typical Area After Takeoff is Completed

1. To assign takeoff to a typical area, from the **Settings** toolbar **Area** drop down menu on the **Image** tab, select the area you want to assign takeoff to.
2. When you first do this, you will notice that all of your takeoff has grayed out, this means that there is no takeoff assigned to your selected typical area yet.
3. With your preferred area showing in the **Area** drop down menu, use the **Select**  and select the takeoff you want to assign to that area. You can do this one segment at a time or by selecting a takeoff object, or by pressing the **Shift** key on your keyboard and selecting multiple objects.
4. Once you have your takeoff objects selected, right-click and select **Assign to Current Area**. Repeat this process for all takeoff objects you want to assign to a particular typical area.

Assigning Takeoff Objects to a Typical Area Before You Begin Takeoff

You can assign takeoff to a typical area before you begin takeoff.


1. To do this, select an area from the **Settings** toolbar **Area** drop down menu.
2. Next, select a condition from the **Condition List** and begin takeoff. Any takeoff you perform will be assigned to the current area, which is visible in the **Area** drop down field.

Section 10

Performing Takeoff

Linear Object Takeoff -Straight Lines


You can take off linear objects in two modes, **Normal** and **Continuous**. There are two methods for taking off curved lines, which are discussed below.

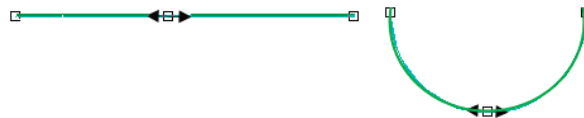
1. To take off a linear object in **Normal** mode, select a linear condition from the **Condition List**.
2. Click where you want to begin performing takeoff for your linear object.
3. Hold down the mouse button, drag your object to where you want to end the linear segment, and release to close out the object.
4. To takeoff a linear object in **Continuous** mode, select a linear condition from the **Condition List**, and click the **Continuous Mode** icon .
5. Click where you want to begin takeoff for your linear object.
6. Drag your object to where you want to end the first segment, click your mouse or stylus, and take off your next segment.

NOTE: When in **Continuous** mode, you must release your mouse or stylus at the end of each segment before beginning a new segment.

7. When you have taken off all the connected segments, double-click your mouse or stylus to complete the final segment.
8. To take off a linear object freehand in **Continuous** mode to make a circle or curved wall for example, click and hold where you want your object to begin, hold down the mouse button, and drag to complete. Double-click to close out the object or release to begin a new segment. See [Intelligent Curve Takeoff](#) in this section.

Linear Object Takeoff -Curved Lines (Manually)


1. To set a segment as a curve once you have created it, click the **Select** tool  and select the segment you want to curve.
2. Right-click on the selected segment and click **Set as Curved Segment**.
3. Position your cursor in the box at the center of the segment and drag to curve your segment as desired.



4. Release your mouse or stylus when you achieve the desired curvature.

Linear Object Takeoff -Curved Lines (Default Setting)


When you set up a linear condition, you can set it to automatically be curved. You can go back and set any condition to be curved after you have created it by returning to the **Condition Properties** dialog and following the steps below:

1. To change a condition so that all segments are curveable, right-click the condition in the **Condition Properties** dialog and select **Change Properties**.
2. When the **Condition Properties** dialog appears, select the **Advanced** tab and put a check next to **Set as Curved Segment (default)**.
3. To curve a segment that has been **Set as a Curved Segment** (default), click the **Select** tool  and select the segment you want to curve.

4. Position your cursor in the box at the center of the segment (you will see a double-ended arrow appear) and drag to curve your segment as desired.
5. Release your mouse or stylus when you achieve the desired curvature.

Intelligent Curve Takeoff

The intelligent curve feature allows you to produce linear takeoffs in a manner similar to freehand drawing. You can take off circles and objects with any curvature with this feature.

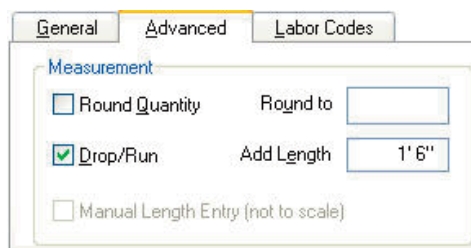
1. To perform takeoff on a linear object in this manner, click the **Continuous Mode** icon .
2. Select the linear condition you want to take off from the **Condition** list.
3. To change the curvature of the object, select where you want to apply your changes. You will notice the boxes denoting the ends of your segments. Click on a box to adjust the curvature of the segment.
 - You can choose the number of segments in a curved segment taken off in this way. This range determines the number of individual segments your intelligent curve linear object will have. The more segments you have, the more you will be able to customize the curve of the object.
 - To adjust the number of segments in an **Intelligent Curve**, select **Tools > Options > General** and then adjust the arrow in the **Intelligent Curve Segments** field.

Applying a Default Drop/Run Value to a Linear Segment

You can apply **Drop/Run** defaults to a particular condition or you can apply them manually to an object.

When applying a default drop/setting value to a condition, any takeoff you perform with the condition will have the **Drop/Run** value added to each linear segment.

1. To apply a default drop/run setting, open the **Condition Properties** dialog for the condition and select the **Advanced** tab.
2. Place a check in the box next to **Drop/Run** in the **Measurement** field.
3. Add the desired drop/run length in the **Add Length** box.

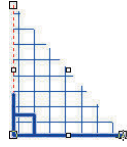


Applying a Drop/Run Value Manually to a Linear Object

1. To apply a **Drop/Run** setting manually, open the **Condition Properties** dialog for the condition and select the **Advanced** tab.
2. Place a check in the box next to **Drop/Run** in the **Measurement** field, but do not put a value in the **Add Length** box.
3. When taking off objects with the **Drop/Run** box checked and no value set, a small box will appear next to every segment of that condition. You can then select a particular box and input any value for each segment.

Area Object Takeoff

1. To perform takeoff on an **Area** object, select an **Area** condition from the **Condition List**.
2. Click once at each corner around the desired area finishing at the starting point to complete the area takeoff. The program will guide you to make perfect right angles by displaying the right angle box and snapping to the degree needed.




NOTE: Hold the **Shift** key if you want the snap removed. To hide the indicator, go to **Tools > Options, General** tab, **Preferences** and deselect the **Show right angle line indicator** box.

3. If the program does not accept a click, you will hear a sound letting you know that you have attempted to perform an unrecognized action. When you hear this sound, return to the last point and try to redo the area. Hitting the **ESC** key backs up your position in the area one point at a time.

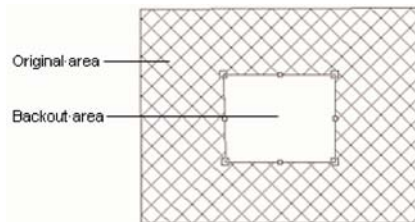
NOTE: When taking off an area, it is not necessary to take off the last segment. When you double-click, On-Screen Takeoff will connect the current point and the starting point.

Performing an Area Backout

1. To back out part of an area once it has been taken off, select the area that you want to apply a backout to, click the **Backout** icon  or from the **Tools** menu, click **Backout Mode**.

NOTE: You must select the appropriate area in order to activate the **Backout** icon and menu selection.

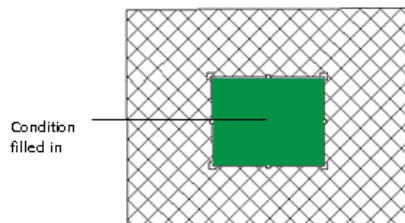
2. Outline the backout area as you would when performing takeoff for a regular area object.
3. The outlined area will clear and area quantities will be recalculated depending on your **Quantity Results** settings. See below.



4. Selecting **Area** in the **Quantity Results** field will always take backouts into consideration and will deduct the backout area value from the total area value.

Filling an Area Backout with a Second Condition

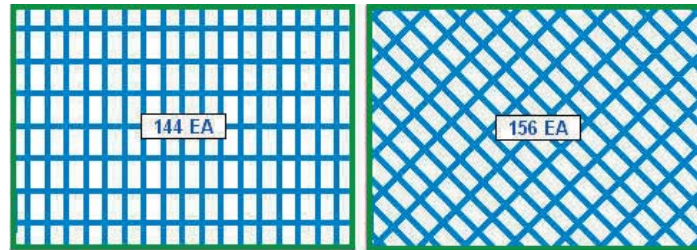
1. Select a condition area from the **Condition** list.
2. Double-click on the backout area. This will load the selected condition into that area.





Aligning a Grid


In some cases an architect or owner can call for a specific layout or installation of a grid-based material such as installing on a diagonal. To take alignment and orientation into consideration, use the **Align Grid** feature.

The following example illustrates the difference in tile count for differing grid alignments.



1. Takeoff your area that contains grid-based material or labor.
2. Once completed, click the **Select Arrow**  and select the area to be aligned.
3. Once selected, right-click over the area and select **Align Grid** from the menu that appears or select the **Align Grid** icon .
4. A green handle will appear over your area.
5. Hover your cursor over the left-hand arm of the green handle. Click, hold and drag in any direction and you will move in the direction you drag the grid pattern within the area you have taken off. Continue this until you have it lined up with the image displayed behind your takeoff.
6. In some cases the grid pattern may need to be rotated in order to line up with the image behind your takeoff.
7. To rotate the grid, hover your cursor over the right-hand arm of the green handle. Your cursor will now appear as a rotate symbol. Click, hold and drag in a circular motion and your grid pattern will rotate within the area in the direction you are dragging the handle. Continue this until you have it lined up with the image displayed behind your takeoff.
8. See [Resizing Linear and Area Objects](#) for information on how to resize an area object. You may want to resize certain segments of an area takeoff to make fine adjustments to your layout.


Selecting Objects

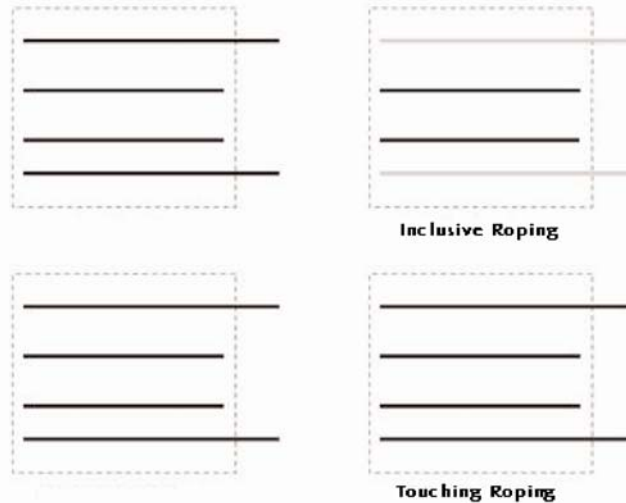
1. To select a specific object, click the **Select** tool  and click directly on the object.
2. To select multiple objects, but not all surrounding objects, use the **Select** tool, and while holding down the **Shift** key, click on the objects you want to select.

Selecting Objects by Roping



Roping allows you to click and drag a region select box around multiple takeoff objects. There are two types of roping:

- **Inclusive Roping** - only takeoff objects located completely within the region box will be selected.
- **Touching Roping** - takeoff objects that are located within or touch the region box will be selected.

1. To set your roping preference, from the **Tools** menu, click **Options** and click either **Inclusive** or **Touching** under **Roping method for object selection** in the **Preferences** field.
2. To rope multiple objects, click the **Select** tool  and click and drag around the objects you want to select.





Moving Objects

1. To move a linear, area, count or attachment takeoff object, click the **Select** tool  and click on the object you want to move.
2. When you see the **Move** cursor, click  and hold your mouse or stylus to move the object to desired location.

NOTE: Attachment objects can only be moved to another location on the parent condition. They cannot be moved off the parent condition.

NOTE: Linears are restricted from lateral movement by default. This is set in the **General** tab of the **Options** dialog on the **Tools** menu.

Resizing Linear and Area Objects

1. To resize a linear or area object select the object. You will see handles (small boxes in fact) at either end of a linear object and at each corner of an area object.
2. Hover your cursor directly over the handle you want to resize to bring up a **Resize** cursor, which will either look like  or  depending on the orientation of the object.
3. When the **Resize** cursor appears, click on the object handle and move the cursor either in or out, up or down, depending on object orientation to resize the object.

NOTE: These steps can also be applied to backout areas.



Count Object Takeoff

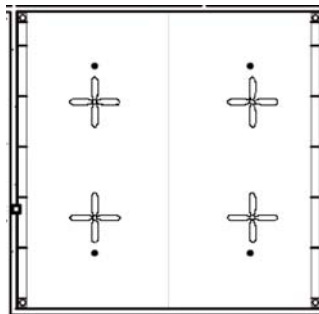
Conditions with **Count** styles can be used to count the number of like items on an image or plan. There are two options for Count object: manual or auto.

- **Manual Count**

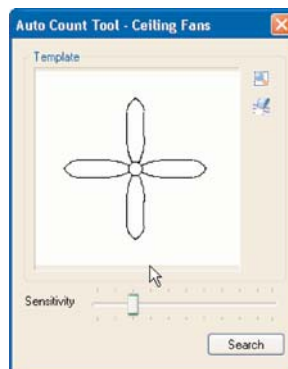
1. Select a **Count** condition from the **Condition List**.
2. Click on the image at each location where you want to place your count object. The quantity will update in the **Conditions** window.
3. Fill in manually using the worksheet.



- **Auto Count**





1. Select a **Count** condition from the **Condition List**.
2. From the **Takeoff** toolbar, click the **Auto Count** icon . The cursor will be in **Takeoff** mode, .
3. Rope the object that you wish to count. In this example, we are roping a ceiling fan.



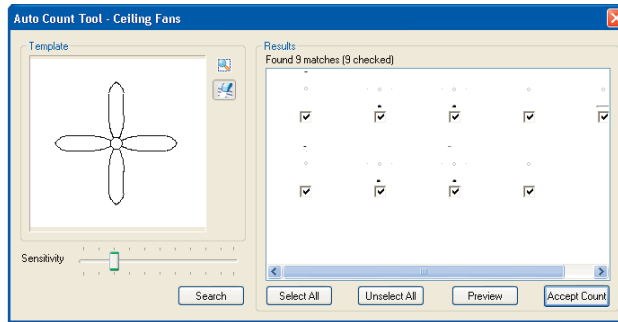
4. The **Auto Count Tool** dialog will appear showing your selection.





5. Erase any unwanted marks on the selected object by clicking the **Eraser** icon  and tracing over the detail you want to remove.
6. If needed, click the **View Window** icon  to take you back to the image and make any selection adjustments.

NOTE: You can also use other features such as **Zoom** , **Zoom Full Page** , **Magnify**  and **Pan**  to help you locate and find a more precise view of your image.

- Set the **Sensitivity** level by clicking and dragging the indicator in the **Auto Count Tool** dialog. The further right the more sensitive the search will be to the exactness of the selected object to count. It is better to perform a less sensitive search and de-select mismatches.



- Click **Search**. A scanning window will appear during the search process. When the search is complete the **Auto Count Tool** dialog will expand to show the results of the search.
- View the results and select the objects that you want to include in the count by placing a check in the box located underneath the selected objects. Use the buttons provided to **Select All**, **Unselect All** or **Preview** (displays **View Window** dialog with all counted objects highlighted).

NOTE: If you are having difficulty finding the correct object to unselect, you can click  to return to the image. Click the **Select** tool  and click on the object you want to take out of the count and delete it manually.

- Click **Accept Count**. The objects will be counted (taken off), and the **Condition** list updated with the quantity.

Attachment Object Takeoff

Attachment objects are attached (and can only be attached) to existing linear or area takeoff objects (referred to as a parent condition) and can affect the quantity result of the parent condition.

To perform takeoff on an attachment object, select an **Attachment** condition from the **Condition List**.

Click to place the attachment onto a parent linear or area condition.

Resizing Attachment Objects

Attachment conditions cannot be individually resized on the **Image** tab. If you have a door as an attachment, for instance, and you want to make this particular door a different size, you have to go that particular attachment condition's **Condition Properties** dialog to change the size.

Doing this will change the size for all objects of this condition type. To change the size of a particular attachment, you must create a new attachment condition for that particular size and re-assign the original takeoff to the new condition. See *Section 7, Building & Adding Conditions, Reassigning Objects to a Different Condition*.



Using the Legend

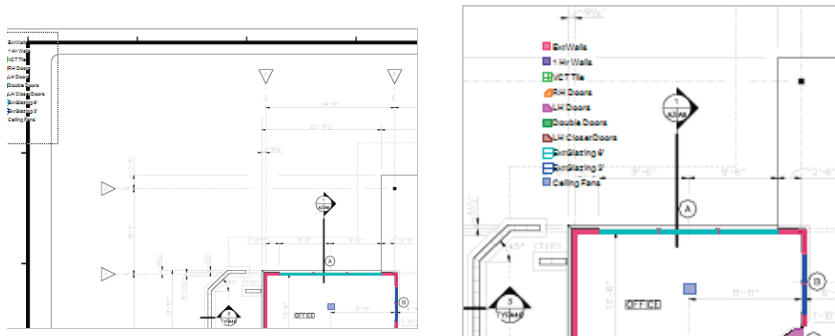
On-Screen Takeoff provides the option of using a condition legend that can be viewed and printed on your plans. It is a per page feature, requiring you to add it to each page which you choose it to show.

By default, the legend lists the condition name, takeoff appearance and quantity 1 result. You can elect to remove the quantities from the legend one of two ways:

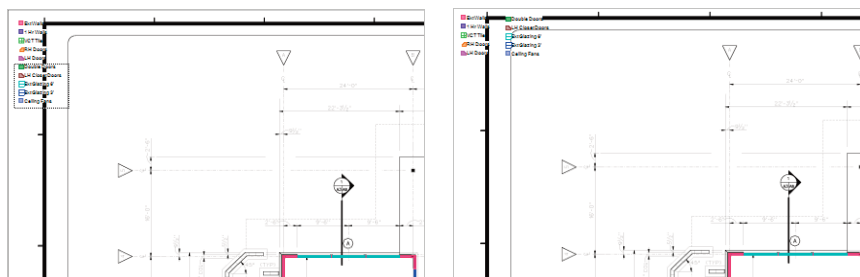
- Change the default in **Tools > Options, New Bid** tab; select **NO** beside **Quantities in legend**. This will affect future bids only.
- Change it at the bid level. From the **Cover Sheet** go to **Preferences** tab, and select **Yes** or **No** for **Quantities in legend**. This will affect the current bid only.


Once you have set your legend preferences you can add it to pages, adjust its location on the page, format, remove, or reset it.

1. From the **Image** tab, click the **Legend** icon  in the **View** toolbar, or from the **View** menu, select **Image Legend**. This will add the legend to the page. It will appear in the upper left corner.
2. You can move the legend anywhere on the page you like.
 - To move the entire legend, click the **Select** tool  from the **Tools** toolbar. Rope the legend, and drag it to the location you desire.





- Move/format each legend object separately using the **Select** tool to select individual legend objects.
- Select multiple objects by holding down the **Shift** key and clicking on the legend objects.



3. If the legend needs to be formatted, select the items individually that you wish to format (single click item) or rope a group of items. The Text toolbar will open allowing you to format the text.
4. To reset the legend back to its original layout, go to **View > Reset Image Legend** or right click and select **Reset Image Legend** from the context menu.
5. To remove the legend from the page click on the **Legend** icon , or go to **View** menu and select **Image Legend**.

Copy and Paste Takeoff

Use the **Copy** and **Paste** features to apply previously drawn takeoff to other areas on your image. You can copy takeoff from one page and paste it on the same or a different page. If you are pasting to an alternative page, the takeoff must fit on the page and the **scale** needs to be set the same as the scale from the page it was copied. See [Section 6, Images, Setting and Calculating the Scale of an Image](#) for more information on scales.

1. From the **Image** tab, select takeoff to copy. The takeoff will appear highlighted.
2. Right-click for the context menu and select **Copy**. You can also click  from the Main toolbar.
3. Go to location (if not in current view) or page you desire to paste the copied takeoff. Right-click for context menu and select **Paste**. You can also click  from the Main toolbar.

NOTE: Copied takeoff will paste by the copied object if object is in view. If not in view, it will paste at top right corner of the Plan View window. If pasting to another page, it will be centered in the Plan View window.

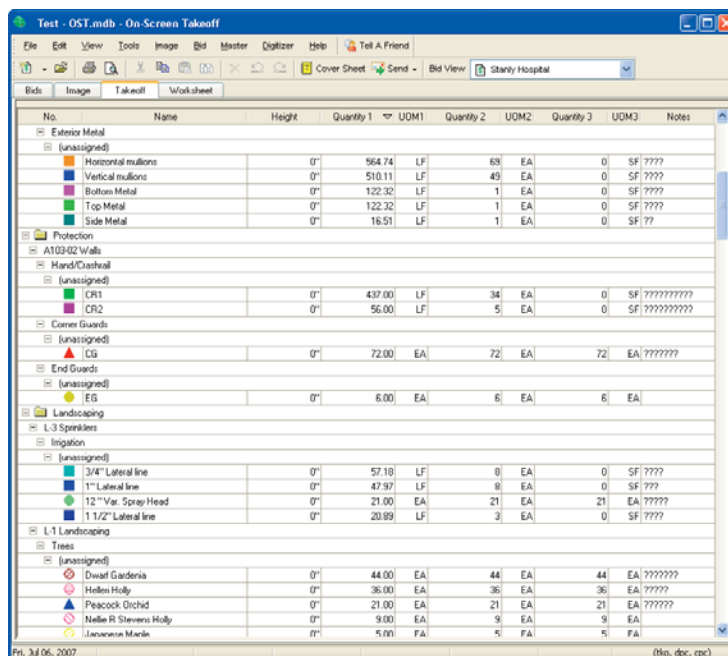
4. Move the copied takeoff to desired location.

Takeoff Tab

The **Takeoff** tab enables you to view quantity breakdowns of your conditions according to results indicated in the **Condition Properties** (i.e. Linear Feet, Square Feet, Each) for **Zones, Areas, Pages** and/or **Types**.


To sort takeoff, click on the desired grouping (i.e. No., Name, Height), an arrow will appear next to the group title. A down arrow will sort in descending order, and an up arrow in ascending.

NOTE: The Takeoff report will print with the same sort established on the **Takeoff** tab.



No.	Name	Height	Quantity 1	UOM1	Quantity 2	UOM2	Quantity 3	UOM3	Notes
Exterior Metal									
(unassigned)									
	Horizontal Mullions	0"	564.74	LF	69	EA	0	SF	????
	Vertical Mullions	0"	510.11	LF	49	EA	0	SF	????
	Bottom Metal	0"	122.32	LF	1	EA	0	SF	????
	Top Metal	0"	122.32	LF	1	EA	0	SF	????
	Side Metal	0"	16.51	LF	1	EA	0	SF	??
Protection									
A10302 Walls									
Hand/Cashrail									
(unassigned)									
	CR1	0"	437.00	LF	34	EA	0	SF	???????????
	CR2	0"	56.00	LF	5	EA	0	SF	???????????
Corner Guards									
(unassigned)									
	CG	0"	72.00	EA	72	EA	72	EA	?????????
End Guards									
(unassigned)									
	EG	0"	6.00	EA	6	EA	6	EA	
Landscaping									
L-3 Sprinklers									
Irrigation									
(unassigned)									
	3/4" Lateral line	0"	57.18	LF	0	EA	0	SF	????
	1" Lateral line	0"	47.97	LF	8	EA	0	SF	???
	1/2" Var. Spray Head	0"	21.00	EA	21	EA	21	EA	?????
	1 1/2" Lateral line	0"	20.89	LF	3	EA	0	SF	????
L-1 Landscaping									
Trees									
(unassigned)									
	Dwarf Gardenia	0"	44.00	EA	44	EA	44	EA	?????????
	Hellebly	0"	36.00	EA	36	EA	36	EA	?????
	Peacock Orchid	0"	21.00	EA	21	EA	21	EA	?????
	Halle R. Stevens Holly	0"	9.00	EA	9	EA	9	EA	
	Lanceoloba Maritima	0"	9.00	EA	9	EA	9	EA	

The Takeoff is set up in spreadsheet format.

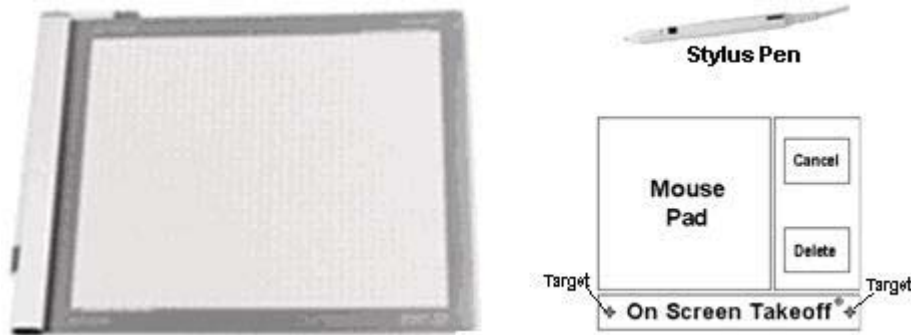
- To rearrange the columns, select the header of the column you want to move and drag the column to the desired location.
- To resize a column, click and hold on either side of the column header to bring up the **Resizing** arrows  ... When the **Resizing** arrows appear, drag the edge of the column to the left or right to achieve desired width.

Section 11

Using a Digitizer

Using a Digitizer

You will use the following tools when using a digitizer to perform takeoffs.



- **Digitizer**-this is where your plans will go when performing takeoffs.
- **Stylus Pen**-tool used to plot points to create takeoffs and generate quantities.
- **Mouse Pad Template**-used to define a region of your digitizer as a mouse pad. When you click your stylus in the defined region, it acts as a mouse rather than a takeoff tool. Use the mouse pad template and your stylus as you would a regular mouse.
- **Digitizer Active Region**-the region of your digitizer that has grid lines. The grey border area is not part of the active region.
- **Takeoff Area**-the area on the digitizer that will contain all takeoff objects.

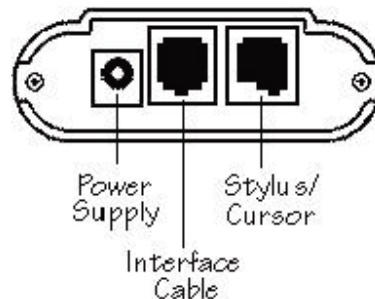
Installing Your Digitizer

Follow the manufacturer's instructions to connect the stylus, power, and serial cables to your digitizer and computer.


NOTE: Your digitizer comes with a serial cable and a USB cable.

NOTE: Follow the manufacturer's instructions for installing the digitizer drivers. If you need assistance with this, call On Center Technical Support at 866-689-5687.

1. Lay the digitizer out flat.
2. Connect the Stylus pen to the digitizer.
3. Plug in the power supply.
4. Plug the interface cable into the digitizer (See following graphic).
5. Plug the other end of the interface cable into the computer.




Configuring Your Digitizer

1. To configure your digitizer, go to the lower left-hand corner of your digitizer, and with your stylus press **S**, **0**, **1**. You will hear a beep once this is done.
2. Next, press the **Orientation** button . Now you are ready to set your mouse template region and takeoff area.

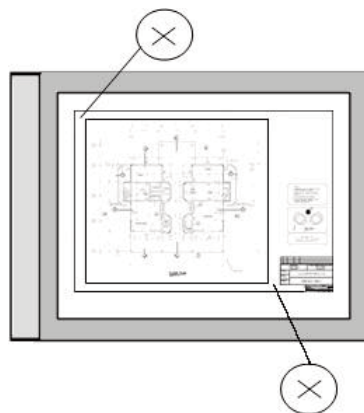


Setting the Mouse Template Region

1. Place your **Mouse Template** on an active region of your digitizer. Secure the template (tape works well) to the digitizer to prevent it from moving during use.
2. From the **Digitizer** menu, click **Place Template**. The **Place Template** dialog appears.
3. Click the target to the left of On-Screen Takeoff on the mouse template. After you hear the beep, click the target to the right of On-Screen Takeoff. You will hear a beep.
4. Use the  button to adjust the mouse template region if needed.

Setting the Takeoff Area

1. Place your drawings on the active region of the digitizer making sure to line up the drawing edges as squarely as possible with the grid lines of the digitizer.
2. From the **Digitizer** menu, click **Set Takeoff Area**. The **Set Takeoff Area** dialog appears.
3. Put a check next to **Apply to all Pages** if you want to set the takeoff area for all pages in your project. If you want to set the takeoff area for the current page only, leave the box empty.
4. Using a pencil, place an **X** in the upper-left and lower-right locations of your drawing. These reference marks will help you determine where your takeoff area is if you have to come back to this drawing to do further takeoffs.



5. Click the **X** in the upper-left corner and then the **X** in the lower-right corner to set your takeoff area. Your drawing is now ready for takeoff.

NOTE: Anything outside this region will not be available for takeoff.

6. Repeat the steps above each time you take off new paper plans.

Section 12

Condition Styles & Style Sets

Creating Condition Styles

A condition style is a condition that has been saved and can be used for other bids. **Condition Styles** are stored in the **Style Library**.

Because the **Style Library** groups styles according to condition type, you should include a **Type Style** when you create a new condition. See *Section 7, Building & Adding Conditions, Linear Conditions, General Tab* for information on condition types.

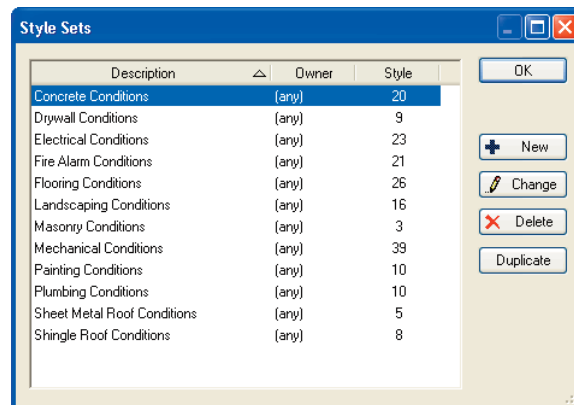
1. To create a **Condition Style**, right-click on the condition in the **Condition List** and click **Save to Style Library** from the list.
2. Click to confirm that the **Condition Style** is to be saved to the **Style Library**.
3. To select multiple conditions, press the **Shift** key on your keyboard while you select each style set.
4. To select all conditions at once, press **Ctrl + A**.

NOTE: If require login is set, a user must have **Styles/ Sets Full Access** in order to add a new **Condition Style** from **Condition Properties**.

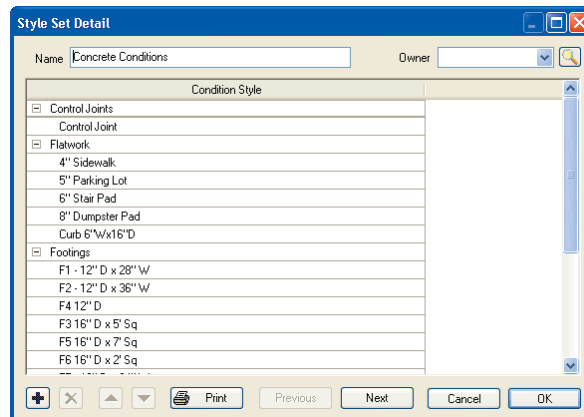
Creating Condition Style Sets

A **Style Set** is a group of condition styles. **Style Sets** are used to combine a group of condition styles into a logical group that can be inserted into any bid.


1. To create a **Style Set**, from the **Master** menu, click **Style Sets** The **Style Sets** dialog will appear.



2. Click . The **Style Set Detail** dialog appears.



3. Click the add button . A blank line will appear.

4. Click the **Lookup** icon .
5. Select the style you want and click .
6. To select multiple **Styles**, press the **Shift** key on your keyboard while you select each style set.
7. To select all **Styles** at once, press **Ctrl + A**.
8. Name and save.

Inserting a Style Set into Your Bid

1. To insert a **Style Set** into your bid, right-click anywhere in the **Condition List** window and select **Insert Style Set**.
2. Click the **Style Sets** you want to insert and click .


To select multiple **Style Sets**, press the **Shift** key while you make your selections, and then click .

Section 13

Layers

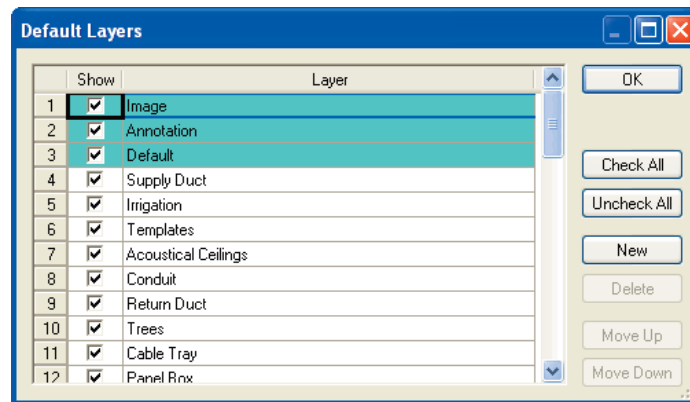
Layers

The information you see on the **Image** tab is arranged in layers with different sets of information residing on different layers. The program comes with preset layers, highlighted in blue on the **Default Layers** dialog. When you create a new bid or database, the program creates these default layers. You can add new default layers, which you can then use in other bids.

1. To add a default layer, from the **Master** menu, click **Default Layers** to bring up the **Default Layers** dialog.
2. Click  to add a row.
3. Type a name for your new layer and then place a check in the **Show** box to the left of the layer name.

NOTE: The **Image**, **Annotation** and **Default** layers, highlighted in blue, are permanent layers and cannot be deleted.

- The **Image** layer contains the images of your plans.
- The **Annotation** layer contains annotations such as hot links, text, dimension lines and the legend.
- The **Default** layer contains all takeoff that has not be assigned to any other layer.

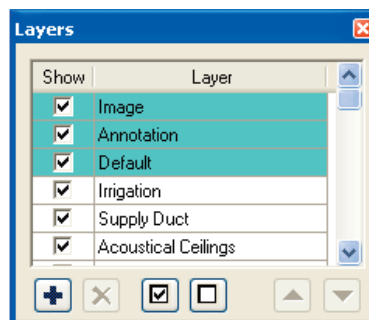



NOTE: The **Default Layers** dialog and the **Default Layer**, which appears in the layers list, **are not** the same thing. The **Default Layers** dialog lists all layers that are added to each bid you create. The **Default Layer** is the layer that contains all takeoff objects not assigned to another layer.

Adding Layers to Your Bid






When you create a new layer for a bid, that layer does not automatically appear in the **Default Layers** list, it is applied to the current bid only.

1. To create a new layer in a bid, click The **Layers** icon  and the **Layers** dialog appears.



2. Click  to add a new layer.
3. Type a name for your new layer and then place a check in the **Show** box to the left of the layer name.

NOTE: The other buttons located at the bottom of the **Layers** dialog perform the following functions:

-   enables you click the **show all** or **show none** box.
-  will **delete** the layer.
-   allows you to **move up** and **move down** while selecting a layer.

Assigning a Condition to a Layer

1. To assign a newly-created condition to a layer, type in a layer name in the **Cover Sheet Layer** field or
2. To assign a layer to an existing condition, right-click on the condition in the **Condition List** and click **Set Layer**.
3. Put a check next to the layer name you want to assign the condition to.

Viewing and Hiding Layers

1. To view a layer, place a check mark in the **Show** box.
2. To hide a layer from view, uncheck the **Show** box. This does not delete the information. It merely hides this layer until it is re-attached.

NOTE: You can delete a layer from the current bid that is not in use.

Section 14

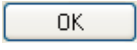
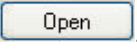
Importing & Exporting

Importing

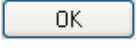
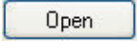
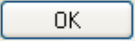
You can import a bid package, a takeoff project file, or iSqft assemblies. It enables you to use established files by importing them into the OST program.

Importing a Bid Package



Bid packages can be imported from the File menu or opened from an e-mail.

- **From the File Menu**
 1. Select **Import**. The **Import** dialog appears.
 2. Select **Bid Package File (*.osp)**, and click . The **Import Bid Package** dialog appears.
 3. Find your file and click .
- **From an E-mail**
 1. Open the e-mail message.
 2. Double click on the *.osp file attachment.

Importing Takeoff Files

1. To import an existing On-Screen Takeoff bid, from the **File** menu, click **Import**. Select **Takeoff file (*.ost, *.osx, *.coe, *.txt)** and click .
2. In the **Open** dialog, locate the file you want to import and click .
3. On the **Cover Sheet**, type the name of your bid in the **Project Name** field and click . Your new bid will appear in the bids list.

Importing iSqft Assemblies

1. From File menu, select **Import**. The **Import** dialog appears.
2. Select **iSqft Assemblies (*.as2)**, and click . The **Select iSqft Assemblies Folder** dialog appears.
3. Browse to the file you want to import and click .

NOTE: Please contact your **iSqft** Account Manager for any further assistance pertaining to these files.

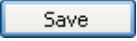
Exporting

You can export a complete bid package, a takeoff project file, or a worksheet spreadsheet. Exported information can be shared with others by e-mailing it, burning the file to a CD, saving to a USB drive, or placing it in a shared network.

Exporting a Bid Package

A **Bid Package** is the *.osp file that is created when you save your bid. The Bid Package can be exported by using the **Send** button or from the **File** menu.

Exporting Takeoff

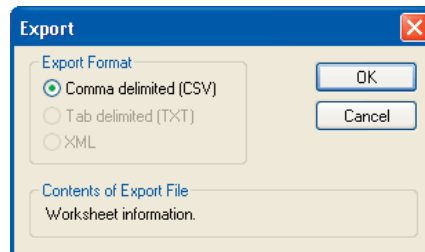
1. From the Bids tab, select the bid and either right click for the context menu, or From **File** menu, click **Export**.
2. Select **To Takeoff file**. The **Export Bid to Takeoff File** dialog will appear.
3. Browse to the location you want the file and give it a **File Name**.
4. click .


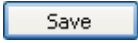

Exporting Takeoff or Worksheet Spreadsheets

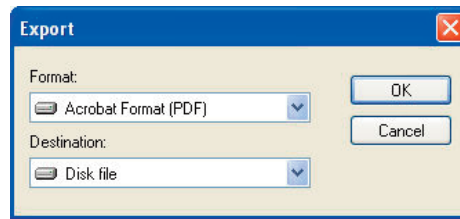
There are two different ways to export your data. You can either export your Worksheet information to a CSV (comma separated value) file or you can use the export feature from any print preview dialog.

- **Export to a CSV File**

1. Open the **Takeoff** or **Worksheet** tab.
2. From the **Main** menu, select **File > Export > To Takeoff File**.



2. In the **Export** dialog, click .
 3. This will open the **Export Takeoff (or Worksheet) tab to CSV file** dialog; you will need to navigate to the folder location where the CSV should be saved.
 4. Name the file and click .
- **Exporting From Print Preview**
 1. Open the **Takeoff** or **Worksheet** tab.
 2. From the **Print Preview** window, click the **Export Report** icon . The **Export** dialog will appear.



3. Under **Format**, select the file format you want your report to be exported into.
4. Under **Destination**, select the target location where you want to save your file.


NOTE: Depending on format and destination, the program will either create a new file or will open your specific export application and send the exported file directly to that application.

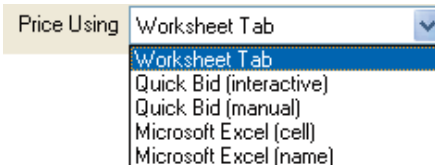
Section 15

Pricing

Pricing

There are three pricing options in On-Screen Takeoff that will allow you to keep track of costs associated with material and labor for your project. You can use the **Worksheet Tab**, **Quick Bid** or **Microsoft Excel**. Your pricing method is set from the Cover Sheet.

1. Click  **Cover Sheet** from the **Main** toolbar to open the **Cover Sheet** dialog.
2. Select a **Price Using** option from the drop-down list.

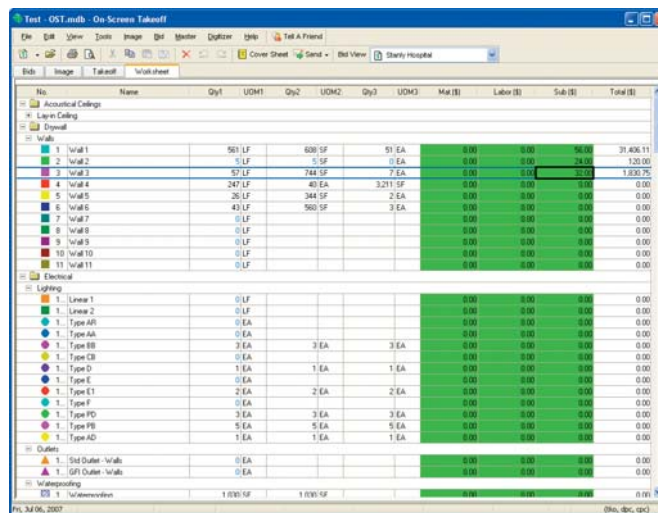


3. Click  to close the **Cover Sheet** dialog.
4. Follow the step, outlined in this section, for the option that you chose.




Price Using Worksheet Tab

For simple estimates, you can use the Worksheet tab. The Worksheet tab displays conditions and quantities in units of measure specified in the **Quantity** fields results are from the **Condition Properties** dialog and can be grouped by condition type. The **Worksheet** tab allows you to enter dollars associated with material, labor and subcontractors for each Condition. The Worksheet automatically calculates the total dollars based on the **Quantity 1** for that condition.

NOTE: The **Worksheet** tab also allows you to manually enter values for conditions that do not have associated takeoff.



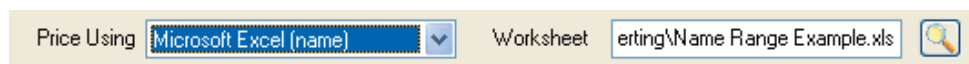
No.	Name	Qty1	UOM1	Qty2	UOM2	Qty3	UOM3	Mat (\$)	Labor (\$)	Sub (\$)	Total (\$)
1	Wall 1	563	LF	609	SF	51	EA	0.00	0.00	56.00	31,406.11
2	Wall 2	1	LF	1	SF	1	EA	0.00	0.00	28.00	1,000.00
3	Wall 3	57	LF	744	SF	7	EA	0.00	0.00	0.00	1,000.00
4	Wall 4	247	LF	40	EA	3,211	SF	0.00	0.00	0.00	0.00
5	Wall 5	26	LF	344	SF	2	EA	0.00	0.00	0.00	0.00
6	Wall 6	43	LF	960	SF	3	EA	0.00	0.00	0.00	0.00
7	Wall 7	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
8	Wall 8	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
9	Wall 9	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
10	Wall 10	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
11	Wall 11	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
1	Linear 1	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
1	Linear 2	0	LF	0	SF	0	EA	0.00	0.00	0.00	0.00
1	Type AA	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Type AB	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Type BB	3	EA	3	EA	3	EA	0.00	0.00	0.00	0.00
1	Type CB	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Type D	1	EA	1	EA	1	EA	0.00	0.00	0.00	0.00
1	Type E	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Type E1	2	EA	2	EA	2	EA	0.00	0.00	0.00	0.00
1	Type F	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Type FD	3	EA	3	EA	3	EA	0.00	0.00	0.00	0.00
1	Type PB	5	EA	5	EA	5	EA	0.00	0.00	0.00	0.00
1	Type AD	1	EA	1	EA	1	EA	0.00	0.00	0.00	0.00
1	Std Outer - Walls	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	GFI Outer - Walls	0	EA	0	EA	0	EA	0.00	0.00	0.00	0.00
1	Waterproofing	1	SF	1	SF	1	SF	0.00	0.00	0.00	0.00


- To rearrange the columns, select the header of the column you want to move and drag the column to the desired location.
- To resize a column, click and hold on either side of the column header to bring up the **Resizing** arrows  .. When the **Resizing** arrows appear, drag the edge of the column to the left or right to achieve desired width.
- Print the **Worksheet** by clicking  from the **Main** toolbar. Then select .
- Export **Worksheet** data. See *Section 14, Importing & Exporting, Exporting Takeoff or Worksheet Spreadsheets* for instructions.

Price Using Microsoft Excel


Use this option if you keep track of your pricing in an Excel spreadsheet. On-Screen Takeoff gives you two options to link takeoff data to your Excel spreadsheet for pricing material and labor.

- To automatically link a condition quantity to an Excel spreadsheet you must have **Price Using Microsoft Excel (cell or name)** selected on your bid **Cover Sheet**.
 - Microsoft Excel (cell)** - This allows you to designate a cell you want data to be placed in by using the cell's location (i.e. Sheet1, A3 or Sheet2, Q27) . If any changes are made to the spreadsheet, OST will still place data in the specified cell. For example, it will not recognize added columns or rows so as to move the data.
 - Microsoft Excel (name)** - This allows you to link data to a named range. If the named range is moved within the spreadsheet, OST responds to the change. For example, it will recognize when a named range has moved due to added columns or rows and update date in the new location.
- When you select **Price Using Microsoft Excel (cell or name)**, you must specify the location of an existing Excel Workbook.



- If you know the file location, you can input it directly, or click the **Lookup** icon  to locate your Excel Workbook file.
- Open **Condition Properties** dialog by double clicking on a condition from the **Image** tab. The **Results** field will appear like the example below depending on the **Quantity** results you select.



- To designate the Excel cell, you click on the **Grid** icon . This will display your spreadsheet.
 - Locate the cell you want the **Quantity Result** to appear in.
 - Double click in that cell and it will be linked. On-Screen Takeoff assigns a cell or name range and uses this as a reference. The quantity's cell or range name is used as the destination within the worksheet to export the quantity value.

NOTE: If you are using Price Using Microsoft Excel (cell), the Export fields are editable. This allows you to quickly type a cell location without the need to display the spreadsheet.
- To update or refresh your Excel spreadsheet press **F9** on your keyboard, or from the **Bid** menu, click **Refresh Worksheet**.

Price Using Quick Bid

Use this pricing option to enable communication between Quick Bid and On-Screen Takeoff. You can designate to have your condition quantities update in real time or manually.

- Go to the bid **Cover Sheet** in On-Screen Takeoff.
- Select either **Price Using Quick Bid (interactive)** or **Price Using Quick Bid (manual)**. You must select one of these two methods to link the programs.

- **Quick Bid (interactive)** - Updates your bid automatically in real-time. With this method, information is automatically updated between the programs. This is the preferred method of interaction as it ensures that changes in one program are automatically updated in the other.
 - **Quick Bid (manual)** - The user initiates the update. With this method you must initiate the updating of information between the programs.
3. Follow instructions for the method you choose.

Quick Bid Interactive

There are several rules to be familiar with when using this pricing method.

- On-Screen Takeoff must be version 3.3 or higher to use the interactive bid feature.
- The bids in On-Screen Takeoff and Quick Bid must have the same number of conditions and the same condition numbers to be connected. Conditions link by number and name.
- New bids must be created in On-Screen Takeoff.
- Update condition quantities in On-Screen Takeoff. The information will be passed to Quick Bid.
- Add or adjust labor, material, and other costs on the **Quick Bid Condition Details** dialog. The **On-Screen Takeoff Labor Codes** tab is locked in interactive mode.
- To open the **Quick Bid Conditions Detail** dialog from On-Screen Takeoff, right-click the condition and select **Change Details**. See the [Quick Bid User's Guide](#) for more detailed instructions.

Quick Bid Manual

With this method you must initiate the updating of information between the programs.

- **Updating a Bid from On-Screen Takeoff**
 1. Select the bid you want to update.
 2. Press **F9**, or
From the **Main** menu, **Bid > Refresh Quick Bid**.
- **Disconnecting Bids from Quick Bid**
 1. In Quick Bid, select the bid and click **Bids > Disconnect from On-Screen Takeoff Bid** on the Main menu bar, or
On the **Bids** tab, right-click on the bid and select **Disconnect from On-Screen Takeoff Bid**, or
- **Reconnecting Bids to Quick Bid**
 1. Select the bid on the **On-Screen Takeoff Bids** tab.
 3. Go to the **Quick Bid Bids** tab and select the bid you want to reconnect to On-Screen Takeoff.
 4. Right-click the selected bid in Quick Bid and select **Connect to On-Screen Takeoff Bid**, or
Select the bid and click **Bids > Connect to On-Screen Takeoff Bid** on the Main menu bar.
 6. Enter the On-Screen Takeoff **bid number** in the dialog box that comes up and click .

NOTE: When reconnecting existing bids, open the bid in On-Screen Takeoff and reconnect from Quick Bid.

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