Training activities: Familiarisation

This document contains training activities. Each activity relates to a training topic and is designed to reinforce learning through practise. Once an activity has been completed, it is essential that the learner practises in their Chalkstring system, using real project data.

You can view the training videos in the Chalkstring User Hub, should you wish to familiarise yourself with any concepts.

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Contents

Activity 1

Set up a project

<table>
<tr><td colspan="2">From the main black menu, select 'Projects'.
Click 'New project'.</td></tr>
<tr><td>Add the name</td><td><Your initials>Training project
Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</td></tr>
<tr><td colspan="2">Fill in the form.
Select at least two work packages.
Save your project.
Once saved, you will be in the project home page.</td></tr>
</table>

Activity 2

Create a baseline assessment

1. Create your assessment
Go to ‘Projects’ in the black menu. Select your project. Select a relevant work package. Click ‘+ New assessment’. Name it ‘Baseline spec’ then click ‘Create’. Click ‘Start assessment’.

2. Create your rate build up
Go to the ‘Rate build up’. Click ‘+ Add product’ button in the bottom left. Add 3 product templates from the database.

3. Create your bill of quantities
Click 'Bill of Quantities'. Click the 'Add Zone' button in the bottom left. Click 'Create multiple zones'. Number of zones: 5. Zone name prefix: ‘Floor’. Click 'Create multiple zones'. Add generic quantities for the zones. E.g 50 *When the assessment is duplicated, these quantities can be changed for the specific job.* *Note: If creating zones one at a time, make sure that zone names are consistent e.g. do not use 'First floor' and then '2nd' floor'. Chalkstring will use these names for searches and exports.*

4. Use the product & component menus
Go to the rate build up. Choose any product and using the menu on the right side, click ‘Move product’ and relocate the product in the rate build up. Click ‘View & edit product’ - the product will open. In the component, using the menu on the right, reposition your component. Then rename it and click ‘Save’.

Activity 3

Price your assessment

1. Duplicate the assessment

Select your project, click on the relevant work package and click on your ‘Baseline spec’.
In the 'Assessment overview', click 'Assessment Actions'.
Select 'Duplicate'. The assessment name should now have '(copy)' next to it.
Go to 'Assessment configuration’ and select the 'cog' icon.
Rename the assessment <Your initials> Pricing option 1 and click ‘Save’.
Click ‘Package assessments’ and you will see two assessments – the one you just created & your baseline spec.

2. Set overhead and profit percentages (OHP) across the whole assessment

Go to the rate build up in your new ‘Pricing option 1’ assessment.
You will see the products from the original assessment listed.
Go to ‘Assessment actions’, ‘Apply to all’.
Set the OHP:

Overhead - 12%
Profit - 20%
Inflation 3%
Click 'Apply to all'.

3. Apply material & labour quotes

Materials
Click ‘Materials’.
Click 'Apply quote'.
Select the quote that has the most total ‘matching materials’.
Click ‘Apply’.
Refresh your browser.
Repeat for labour.

4. Add 'Guesstimates'

For any items that have no applicable quotes, add guesstimates with a supplier.
View & edit the product.
Select 'Edit' for the item missing a price.
Choose '+new Guesstimate'.
Enter the price.
Choose a supplier (for a material) or region (for labour).
Save and apply the Guesstimate.

5. Edit the assessment wholesale

Click 'Materials' and swap a material for another one by clicking the edit icon next to the material name.
Note: this will change the material in ALL the products across the assessment.

Click 'Materials' and swap a supplier price for another one or add a guesstimate by clicking the edit button next to the price.
Note: this will change the supplier & price for that material in ALL the products across the assessment.

6. Add fixed costs / prelims

Go to 'Fixed costs'.
Select the Scissor lift from the drop-down.
Type the quantity needed.
Note: The rate will be updated automatically based on the quantity added.
Type the period length it is needed for e.g. 6 (weeks).
The profit is automatically updated but can be changed here if needed.
Click 'Save'.
The fixed cost will now appear at the top with a total cost.

7. Review the commercials

Select the 'Assessment overview' sub menu.
Review the 'Assessment summary' section on the right.
Expand the arrows for measured costs, fixed costs and Overhead and profit.

Activity 4

Create a tender & accept it onsite

1. Mark the assessment as 'complete'
Go to the 'Assessment overview' for 'Pricing Option 1'. Review the 'Assessment summary' and package price. When happy to proceed with the tender: Go into the rate build up and click 'Mark as complete'. Go to the bill of quantities and click 'Mark as complete'. Go to fixed costs and click 'Mark as complete'. *Even if you have no fixed costs, you must still mark this section as complete.*

2. Create the tender
In the project homepage, go to 'Create Tender' on the right side. Tick the box for the assessment and click 'Create tender' - *the assessment will now be available in the 'Tenders' section.* Click 'Generate bill & cover letter' - *This will take you to the tender page.* In 'Tenders' above, click 'Generate bill & cover letter'. Click 'Generate bill & cover letter' in the top right. Fill out the details for the tender documentation and click the 'Submit tender'. In the 'Tender documents' section, download and view the tender documents. *At this stage you would email these documents to your client. Let's assume the tender has been agreed and secured by the client.*

3. 'Accept' the tender onsite
In the project home page, go to 'Tenders' section on the right. You can see which tenders have been submitted. Click the arrow. Click 'Accepted'. Go to the project home page and click 'Project Hub'. This will take you to the Project Hub and the blue menu for onsite projects.

Activity 5

Ordering materials

1. View the bill & swap quotes
From the main blue menu, select 'Materials'. Go to the 'Material bill' sub menu. Select your relevant work package. Click the 'i' button in the following areas to view information: Package totals – View the details Zones - View the details Material - View the details Balance - View the details

2. Add items to an order
Individual material by zone
Search for a material. Click the + button for the material in any zone. Add the quantity you want to order. Click 'Add to order'.

3. Create a draft order and confirm the order
Draft order Go to 'Draft orders' to see a list of all orders. Click into your order. Confirm order Click the 'Confirm order' button. Check and update the delivery date. Check the 'Order items' and update the rounding option to suit the item. Click 'Confirm order'. The status for the order is now 'Held'. Click 'Download draft order' and add some order notes. E.g. deliver to back gate. View the downloaded order spreadsheet. In Chalkstring, click the 'Mark as sent' button. The status for the order is now 'Sent'

Activity 6

Log deliveries

Delivery schedule

Go to the ‘Delivery schedule’ sub menu.

Make a note of an order number.

Click 'Export schedule'.

View the spreadsheet details.

Log a delivery

Go to 'Open orders' sub menu.

Click your order.

Click the 'Log delivery' button.

Check the delivery date.

Upload a document or picture (click here to download an example delivery note).

Assume that all materials have been delivered on time and in full

Click 'Delivered in full'.

Click 'Update delivery totals'.

The status of the order is now 'Fulfilled'.

Activity 7

Process a material invoice

1. Attach an invoice
Once an invoice has been sent to you from your supplier, it's a quick process to add the invoice information in Chalkstring. Click on the order. Click the 'Attach invoice' button. Type in the invoice reference and value. Upload a copy of the received invoice (click here to download an example invoice). Click 'Save invoice'. The status of the invoice will be 'review'.

2. Approve an invoice
For the invoice, check the invoice values. In the 'Approve payment' section, type in the value to approve. Click 'Approve for payment'. The status of the invoice will be 'Approved'.

Activity 8

Log progress

1. Log progress by product
From the blue menu, click on 'Progress'. You will be taken to the 'Progress by product' page. Choose a relevant work package from the drop-down. <u>Log progress</u> Click the + button for a product. View the product components. Use the slider to log progress for each component. Click' Save changes'

Activity 9

Process labour applications

1. View the bill & swap pricing
From the main blue menu, select 'Labour'. You will be taken to the 'Labour bill' sub menu. Select the relevant work package.

2. Input a labour claim
Individual activity by zone
Click the + button for an activity. Check the quantity (of work completed). Leave the rate as it is. Click 'Add to application'. Click 'Bill actions'. Click 'Save Draft'. Add an effective date and choose a subcontractor and click ‘Save’.

3. Review & approve a labour application
Go to the 'Review applications' sub menu. Select the relevant work package and zone to if you need to edit the application. *Find a claim and click on the magnifying glass to establish which package and zone the claim applies to.* Click the ‘edit’ button for the activity and zone you want to edit. Edit a figure to change the quantity. Click ‘update’. Click the 'Approve' button.

Activity 10

Generate an outgoing application for payment

1. Review the application preview

Before inputting applications for payment, make sure that progress has been accurately updated.

From the main blue menu, select 'Applications'.

You will be taken to the 'Outgoing application bill' sub menu.

Select the relevant work package.

Click the 'Preview outgoing application' to view the application if it were generated now.

2. Generate application

Click the 'Generate outgoing application' button.

Leave the presented options as the default and click 'Generate'.

After a short amount of time, the application will be appear in the 'Open applications' sub menu.

Click the 'Open outgoing applications' submenu.

The application you have created will be in a 'Held' status.

Click on the application to view details.

In the documents section, click on the application download to view the Excel spreadsheet.

3. Certifying payment

Let's assume that you have emailed the application spreadsheet to your client and have now received the payment notice.

Go to the 'Open outgoing applications' submenu.

Go into the application and click the 'Mark as sent' button.

The application will now have an 'Approve payment' section at the bottom half of the page.

Let's assume you have now received the payment notice.

In the 'Approve payment' section of the page, add the effective date for the payment period.

Click the 'Set approved as applied' button.

Click the 'Submit the certified figures' to approve the application.

If you have any questions and you need support to complete the any of the activities, please raise a helpdesk ticket through the Chalkstring User Hub.