

# **BidPoint XL™**

## **Installation & Use**

### **Guide**



**If you have any questions, comments or suggestions please contact us at any time:**

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## BidPoint XL Preface

A few words on performing the takeoff and estimate for construction activities:

- Quantity Takeoff is performed by measuring certain items and then calculating the desired quantities from these measurements.
- Estimating is applying costs to the quantities.

Applying the estimated cost to the quantities is usually performed in either an Excel workbook or through a relational database estimating program. We believe that organizing your takeoff quantities in Microsoft Excel, regardless of the software used for estimating, is often the easiest, most logical and best way to organize the takeoff for most contractors. Measure with BidPoint and calculate quantities with Microsoft Excel. Excel is not for everybody however; certain divisions of work, such as site excavation and some of the mechanical trades may be better served by performing the takeoff in trade specific, non-spreadsheet applications. Overwhelmingly however, Excel is the number one application by far for both large and small contractors for documenting takeoff quantities. In addition to the takeoff, Excel also has the largest market share among contractors for estimating the costs.

As a result of the widespread use and power of Excel, we promote Excel estimating and have included a collection of takeoff and estimating workbook files for your use and review. Many of our customers have already created their own Excel estimating template. Others use the included Excel workbooks and customize these templates to fit their needs. After installing the software, the Excel takeoff and estimating workbooks provided with BidPoint can be accessed from the BidPoint XL programs list.

### Introduction to BidPoint XL for paper plans

BidPoint XL is a Microsoft Excel add-in program that allows you to measure, areas, lengths and count items, using a digitizer tablet while working in Excel. Additional calculations can be performed with BidPoint XL through Microsoft Excel formulas and functions. A concise audit trail is provided by automatically storing the digitized drawing into any Excel workbook cell and file. In summary, BidPoint XL allows you to measure from paper plans while clearly organizing your takeoff in any Microsoft Excel workbook.

Use your own Excel workbooks or utilize any of the Excel templates installed at C:\Documents and Settings\All Users\Documents\Vertigraph\BidPoint XL\examples.

Requirements - Microsoft Excel version 97 or later is required. You need to be an administrator, have administrator privileges, or "Run As" the administrator.

#### **Minimum System Requirements:**

Microsoft Windows Operating system  
Microsoft Excel 2000+  
2GB of RAM (XP) or 3GB (Vista)  
800 x 600 Display Resolution.

#### **Recommended System Requirements:**

Windows Vista Operating System  
Microsoft Excel 2003 or 2007  
3GB RAM (XP) or 4GB (Vista)  
1440 x 900 Display Resolution

## Installation of BidPoint XL

### Step 1 – Install BidPoint XL Software

- Install BidPoint XL from the Vertigraph disc or go to <http://www.vertigraph.com> and click on the Download Evaluation
- Complete the requested information and click the Submit at the bottom of the page.
- Click on the Evaluation link next to BidPoint XL and select save. Do not run the installation from the web page.
- Save the BidPoint XL\_Setup.exe to your desktop and then double click BidPoint XL\_Setup.exe on to begin installation (make sure MS Excel is closed before starting the installation). Follow wizard instructions.

### Step 2 - Add BidPoint XL to Microsoft Excel

#### For Excel versions prior to 2007


- From a blank Excel workbook Click on the Tools menu; click Add-Ins; click Browse and navigate to C:\Program Files\Vertigraph\BidPoint XL folder.
- Click on the file named BidPointXL.xla, and click OK. This will place you back in the Add-Ins list, Click OK.
- A BidPoint XL menu is added to the left of the Excel Help menu and a BidPoint XL toolbar is added. If the toolbar is not displayed, click on View, Toolbars in Excel to insure the BidPoint XL toolbar is checked. If the BidPoint XL menu is not active or grayed out, exit Excel and reopen to activate the BidPoint XL menu.

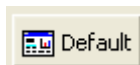
#### If you have Excel 2007

- From a blank Excel workbook Click on the Office button on the top left hand corner of Excel and Select Excel Options.
- From the Excel Options Window Click on Add-Ins on the left.
- Click the Go button at the bottom of the page next to Manager Excel Add-ins; this will display your Add-Ins list.
- Click browse and navigate to C:\Program Files\Vertigraph\BidPoint XL folder and then Click on the file named BidScreenXL.xla, and click OK. This will place you back in the Add-Ins list. Click OK
- An Add-Ins Tab is added to Excel and under the Tab the BidPoint XL menu and Toolbar will be located.

### Tips and Important Information for Setup and Operating BidPoint XL with Excel:

User specific setup options are located under Setup Menu at the Options Tab:

Click on the  to change to the recommended User settings for Version 5. This will place user specific Toolbars in the Takeoff Window along with your Style Palette for easy access. Additional Toolbars can be selected to display at the Takeoff Window under the Setup|Takeoff Window tab once you are more familiar with the BidPoint XL program.

If you prefer the previous versions of BidPoint XL click on the  under the Options Tab to return the Takeoff Window to the “Classic” BidPoint XL look and feel.

**BidPoint XL requires the installation of TabletWorks wintab driver. Please contact GTCO at 800-344-4723 or Interworld at 800-663-6001 for help.**

To setup button commands, go to the Setup command in the Digitizer menu. Click the Cursor Style tab. Confirm that a check is next to the correct pointing device. Click on the button to the right of "Set button actions to recommended values". Add sound to the buttons by clicking on the buttons tab and selecting the sound you would like played when the button is pressed.

To measure, click in an Excel cell, select the measurement command from toolbar (i.e. count, section length, continuous length or area), set scale and begin measuring with the zero (0) button on the 16 button cursor or the tip of a stylus pen. To stop digitizing and return to Excel, press the 3 button on the sixteen button cursor.

Important program information: BidPoint XL writes Cell Comments to each digitized cell as well as the "Default Cell" for a Workbook/Worksheet. Each Workbook should contain only 1 Default Cell which holds the "brains" of the workbook for BidPoint XL; the Default Cell is typically cell A1 but may be A2 or B1 or B2. Care should be taken to:

- a) Not delete the Default Cell of a digitized workbook/worksheet should you wish your digitized information to be saved for future reference;
- b) Use caution when copying cells/columns/rows/worksheets that contain digitized information and
- c) When recycling a used/digitized workbook/worksheet be sure that ALL digitized cells, along with the Default Cell from a previously digitized job are removed.

All support documentation is installed with BidPoint XL in pdf format under C:\Program Files\Vertigraph\BidPoint XL\pdf. We recommend you go thru the short Tutorial document when starting your first takeoff to familiarize yourself with the basics of the program.

# The BidPoint XL Setup Window

**Use Drawing Names**  
If Use Drawing Names is checked, name and identify the drawing name as you digitize measurements.

**Fast Comment Scanning**  
Fast Comment Scanning will speed up opening and closing large files with BidPoint cell comments present. However, if checked, a runtime error 1004 could occur.

**Automatic Update Check**  
Automatically check for BidPoint updates when they are sent

Other visible options:  Show Cell Change Confirm,  Automatic Update Check, Movement: 100ppi (40ppc), 20ppi (8ppc), 50ppi (20ppc), 10ppi (4ppc).

**Status Bar**  
Displays information about the drawing found at the bottom of the takeoff

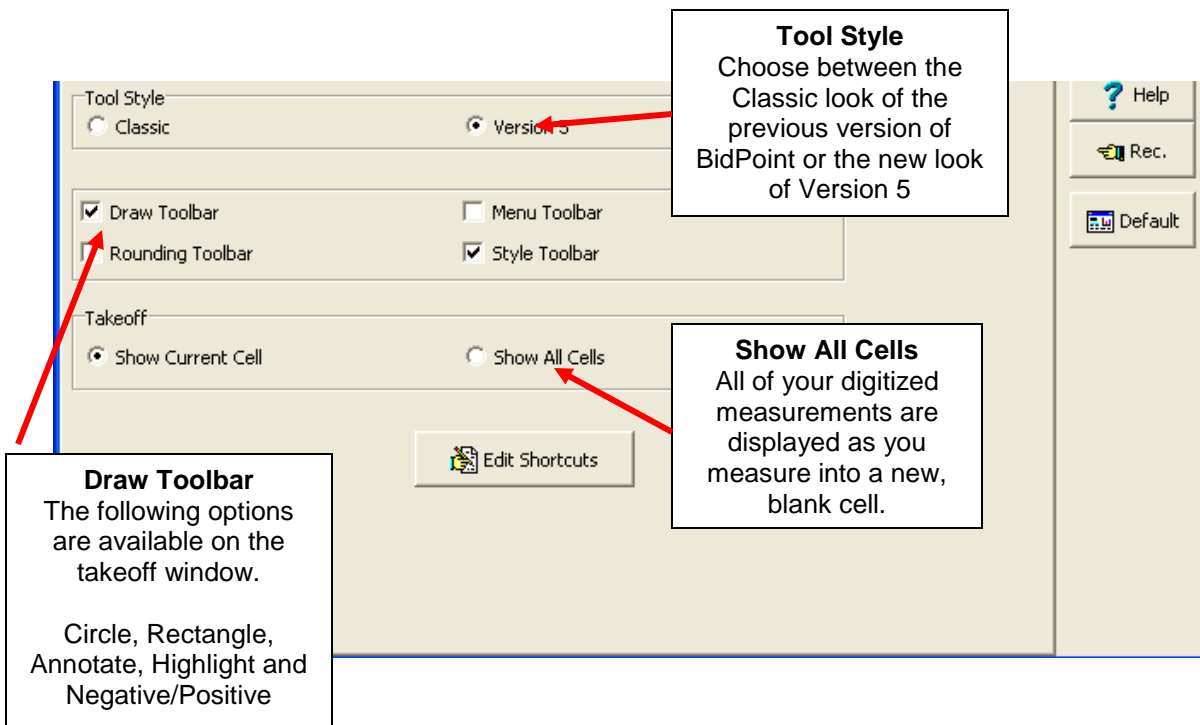
**Information Bar**  
Displays the following at top of takeoff window:

- Name of loaded drawing
- Style being used
- File format
- Current scale

**Style Palette**  
Select styles from a palette that appears on the left hand side of the takeoff window

**Auto Hide Style Palette**  
Will automatically hide or display the Style Palette once the cursor is moved over it.

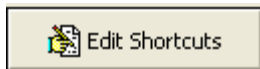
Other visible options:  Show Status Bar,  Show Information Bar,  Show Style Palette,  Auto Hide Style Palette.



## Edit Keyboard Shortcuts

BidPoint has numerous keyboard shortcuts assigned to many of the functions used during takeoff, such as Close Area or delete last point. The keyboard shortcuts are already setup by default. However, if needed, the user has the option to change those keyboard strokes.

To change any of these keyboard shortcuts, click on Edit Shortcuts. This button is found by clicking on the setup command from the BidPoint menu and then clicking on the Takeoff window tab.

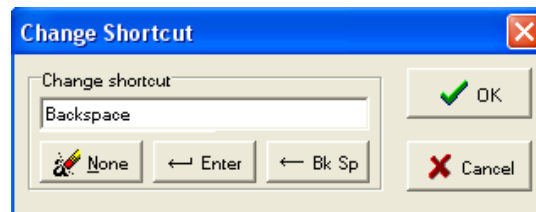


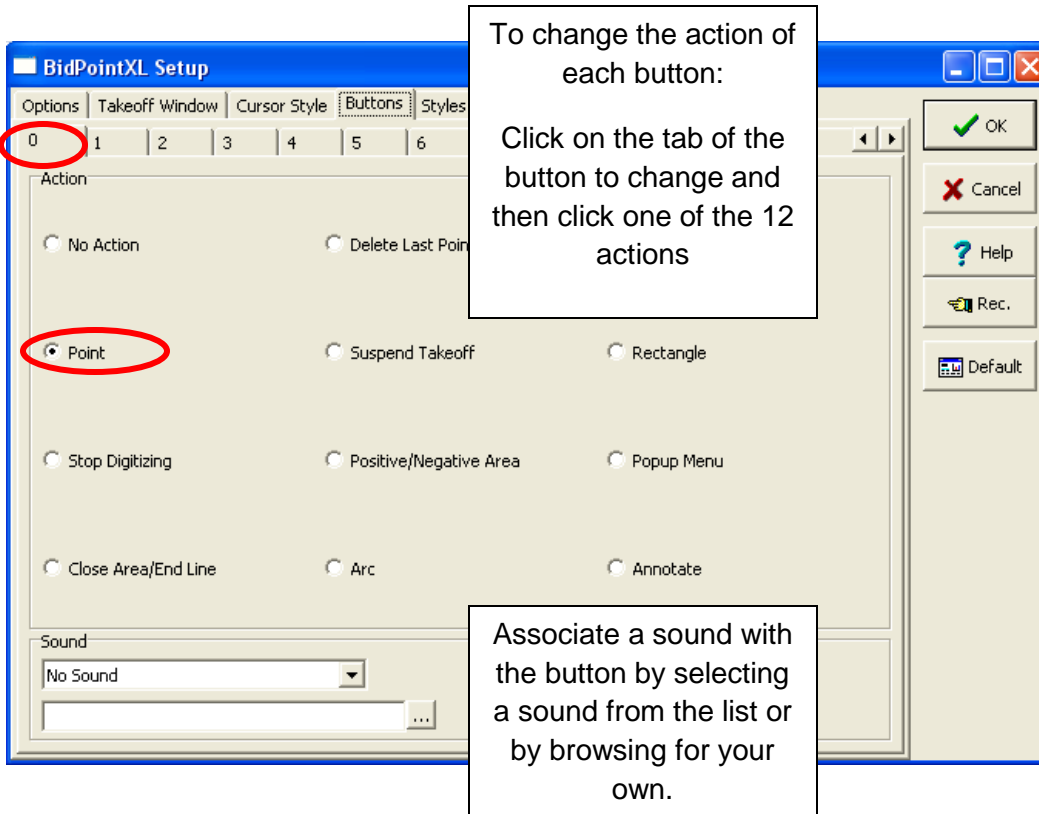
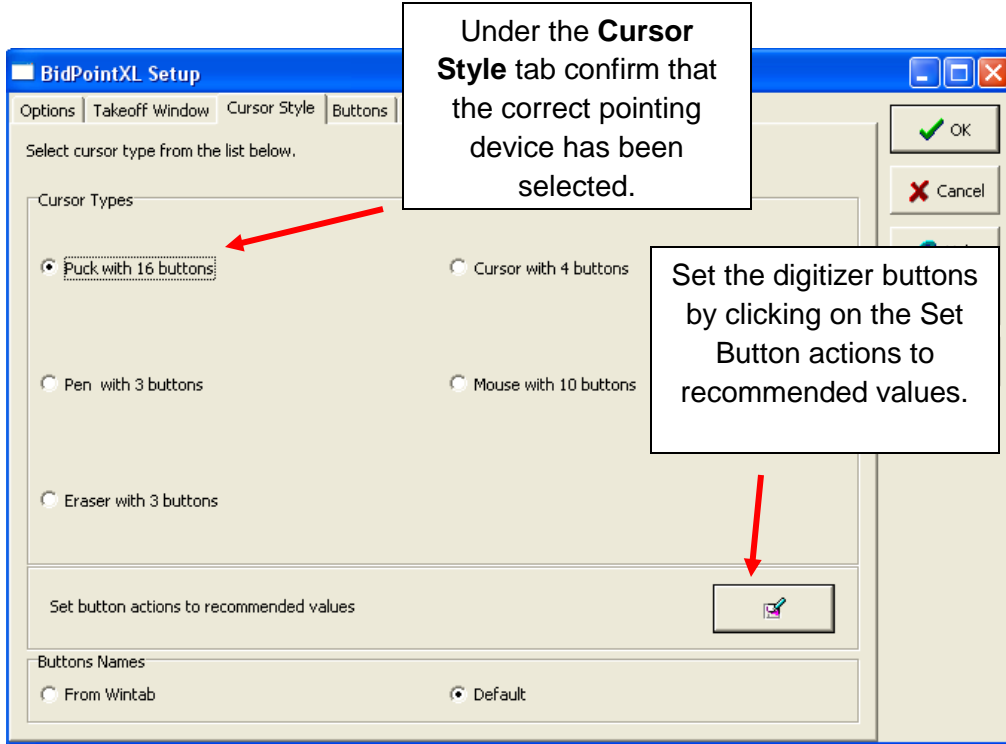
This shortcut editor displays (left) a list of all the actions that are assigned keyboard shortcuts.

To change the combinations, select the action by clicking on the Shortcut Key column of the action.

The change shortcut dialog appears.

Press the desired key combination and it will appear in the edit box. Click OK to save settings.





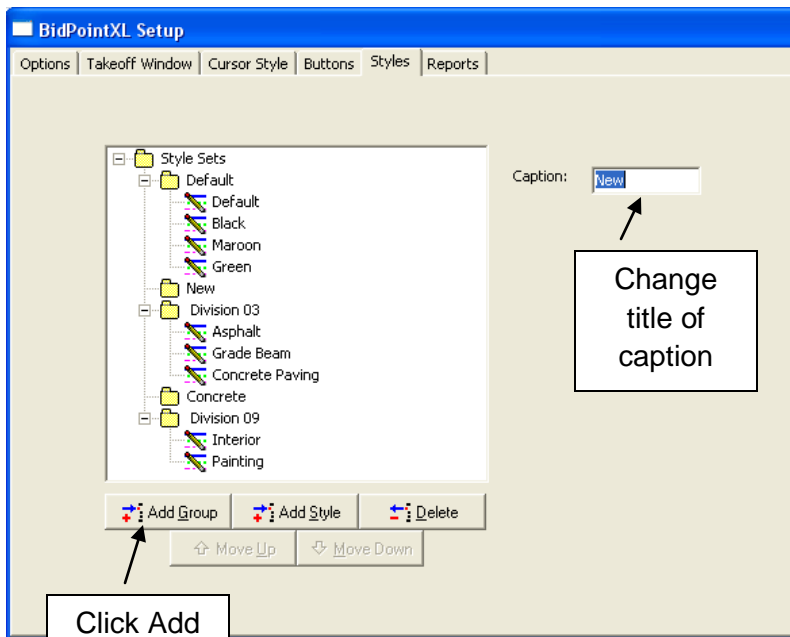
## Styles Tab Window

Create and organize measurement styles at the Styles tab. If the Styles tab does not appear, click back on the options tab and confirm Use Styles is checked.

## Use Styles

Styles refer to the way the takeoff is displayed on the screen and how it appears when printed. To quickly identify different type of measurements or certain areas, there are five style characteristics available to make identifying those easier.

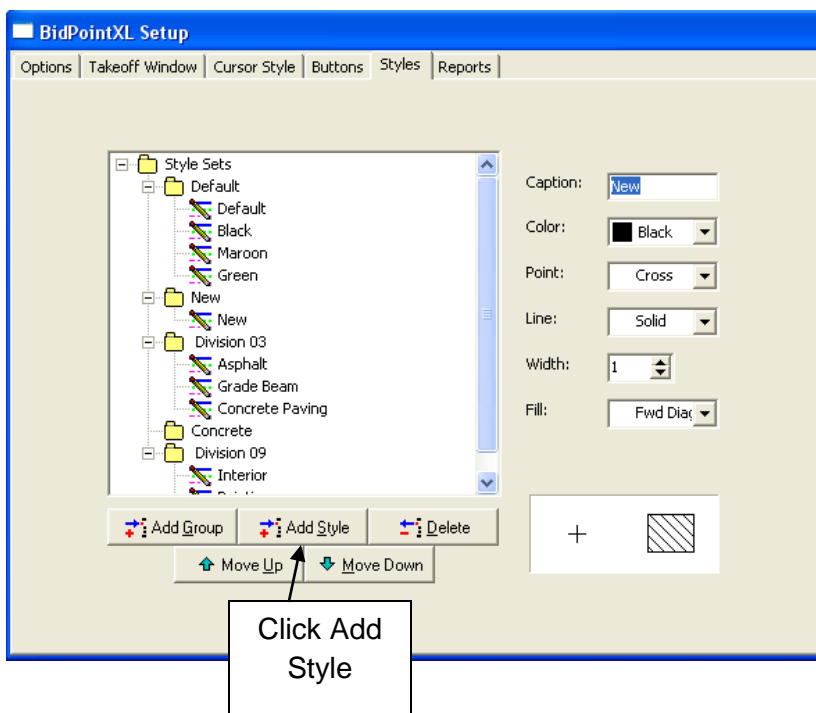
Individual styles are organized into groups. Groups may be defined in any logical manner. Some users organize their style groups by project name, CSI division, material type, subcontractor trade or even color.



Change title of caption

Click Add Group

Name the style; change the color, the style of pointer, the line width and style, and the fill pattern.

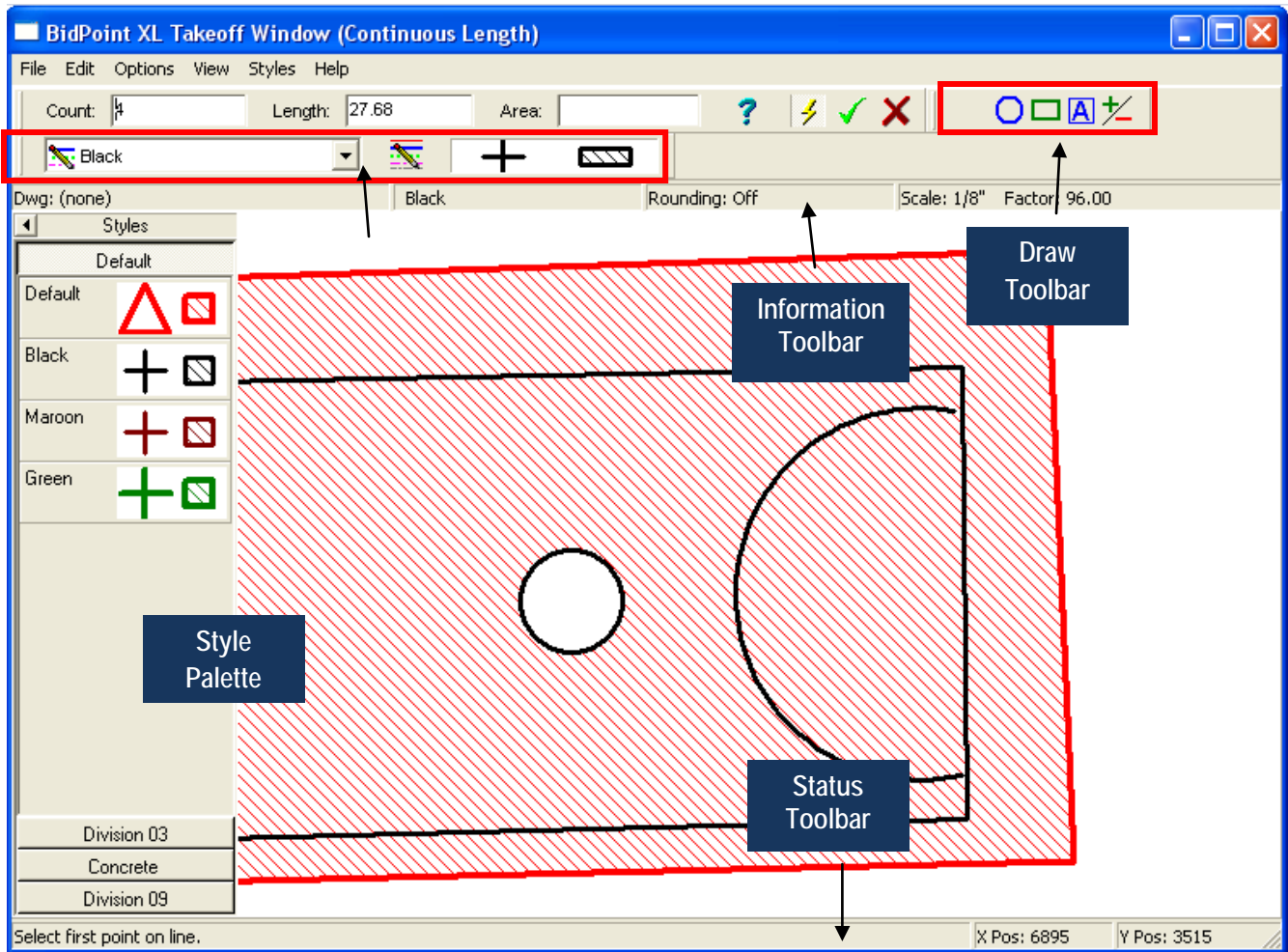


Click Add Style

If Show Style Palette is selected, the styles created are available while digitizing drawings by clicking on them.

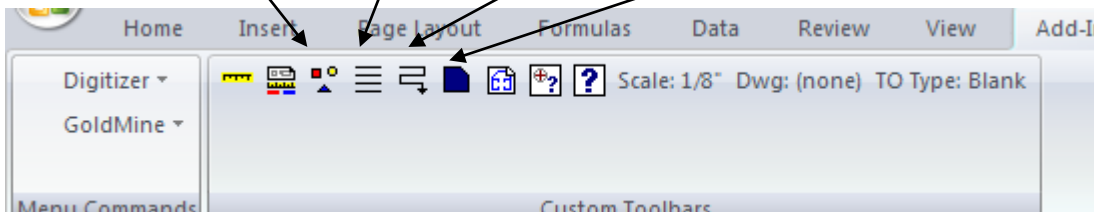
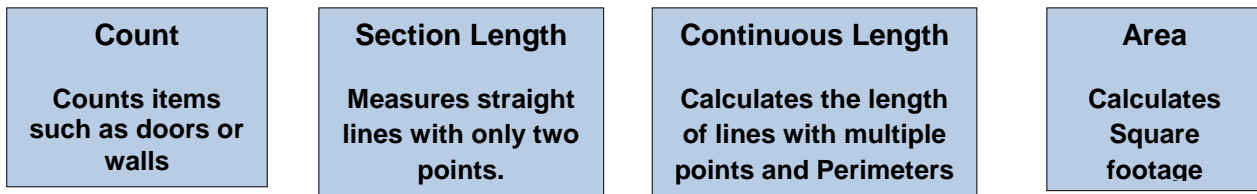
In the **Setup/Options** tab you have the option to:

1. Use Styles
2. Share Styles,
3. Change the default path of the Style File to a common location for sharing across multiple users and programs (ie.. BidPoint XL)
4. Allow Writing – not Recommended



The Takeoff window is where measuring will be done and the drawing will display. The Draw, Zoom, Information and Status Toolbars will appear in this window if Version 5 is selected in the Setup menu.

If Styles has been selected under the Options and Takeoff tab and Show Style Palette, they will both appear in this window as well. Auto Hide Style Palette can be selected in the Takeoff tab under Setup to hide the palette when not needed.



Once a cell is digitized, the drawing name, takeoff type and digitized scale are displayed for you from the toolbar. Simply click on the cell to determine the digitized data it contains.


### Shortcuts and Tips:

To record the perimeter length of an area, you can digitize the area takeoff in one cell and then move to a new, blank cell and select the Digitizer | Continuous Length command. Click the green checkmark to accept the measurement. The perimeter length of the last area measured is placed in that cell.

Section lines are ideal for measuring straight lines. A section line will only have two points, a beginning of line point and an end of the line point. If the count number is even, the next point you click will be the beginning of the next line. If the count number displayed is an odd number, the next point you click will be the end the line.

Once digitized, you can retroactively go back and change the digitized scale of a single, or multiple, cells by selecting the cell/cells and selecting the Digitizer | Change Scale command.

## Print Drawing in BidPoint XL

To view or print takeoffs in multiple cells, click on the first cell and hold down the Ctrl key on the keyboard as you click on other cells that have digitized data. Once all the cells are selected, select Digitizer | Print Drawing  to display the Print Preview Window.

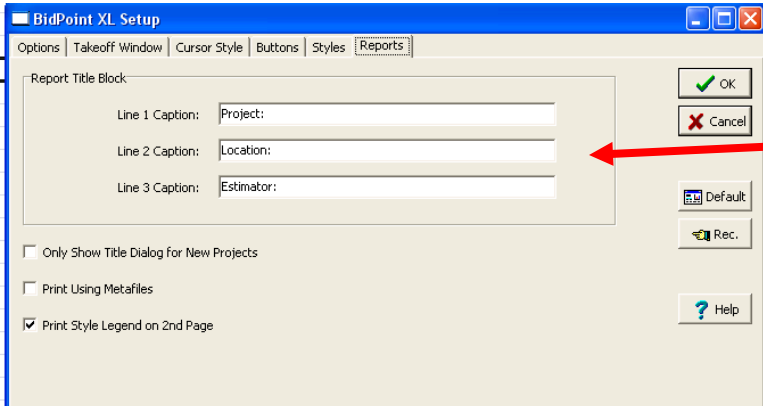
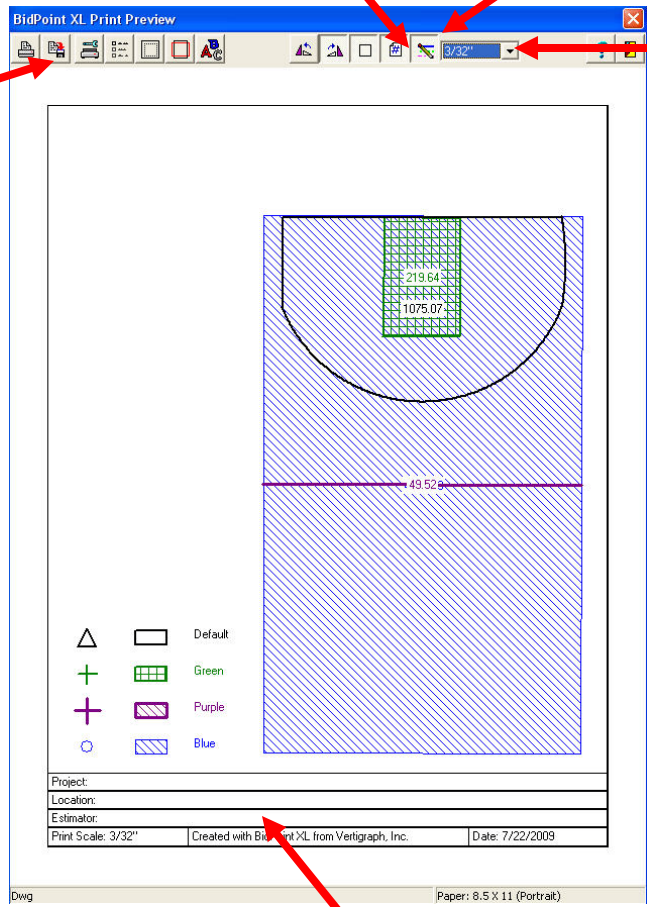
The available print commands are found at the top of the Print Preview window.

Show Measurements

Style Legend

Print Scale

Print to PDF format

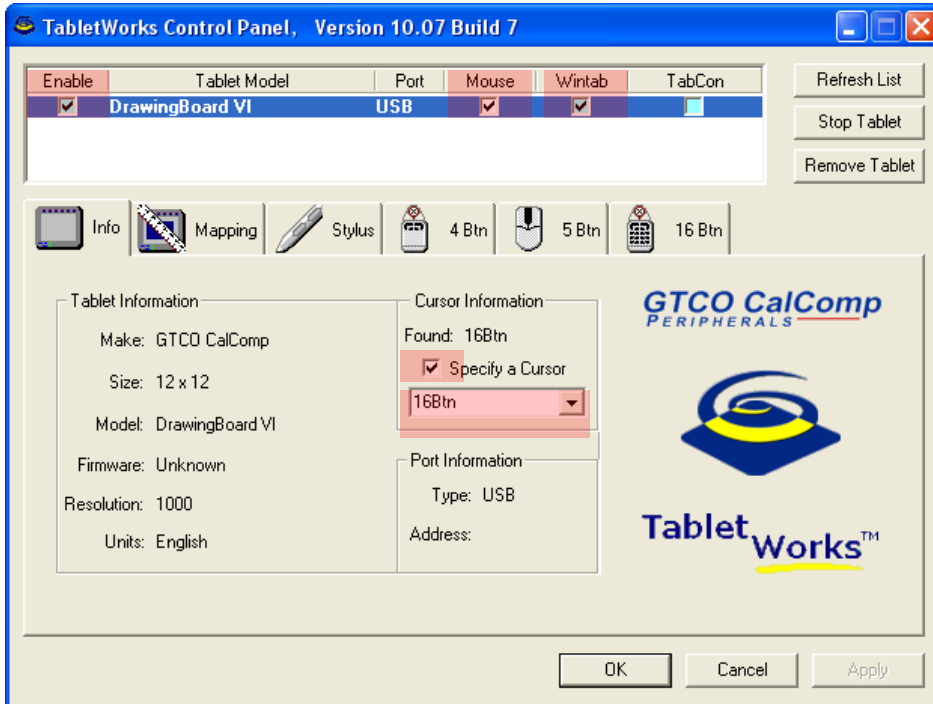


Job data displayed at the bottom of the print out is customizable in the Digitizer | Setup under the Reports tab.

The driver for the digitizer must first be installed in order for the digitizer to communicate to the computer, the driver has to be installed.

Tabletworks is the driver for the GTCO board and a disk was shipped with the board. If there is no disk available, please go to the GTCO website and download the latest driver.

A few settings have to change in order for BidPoint to recognize the board.

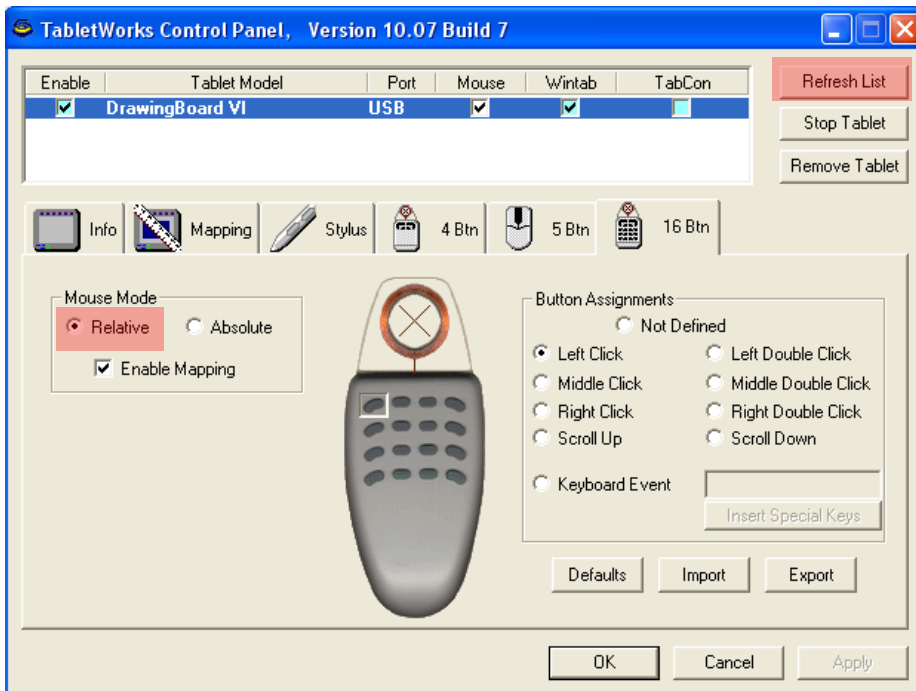


After installing Tabletworks, an icon is placed in the bottom right hand corner (next to the time).

Double click on the icon. The control panel opens.

Confirm that enable, mouse and wintab have a check underneath the headings.

Click on the info tab. Place a check next to specify a cursor and select the proper cursor.



If you have a stylus, click on the stylus tab. If you have a 16 button cursor click on the 16 button tab.

This change is demonstrated with the 16 button tab.

On the right hand side, to the left of the picture, click relative instead of absolute.

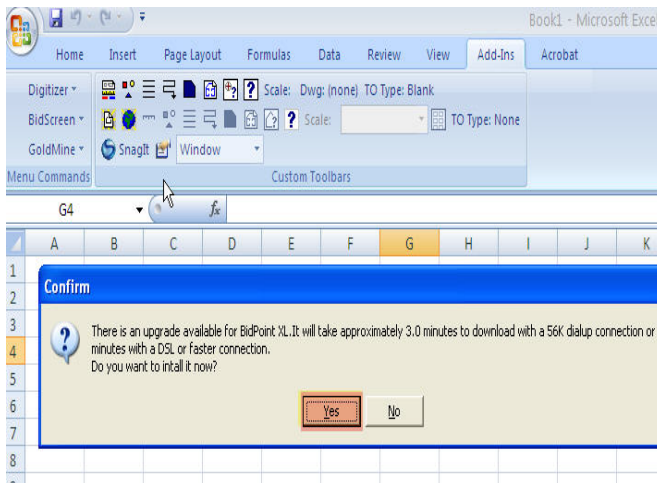
Click Refresh List in the top right hand corner. Save changes. Then click OK.

Drag the pointing device around the board; as long as the cursor on the screen moves smoothly, the driver is setup correctly.

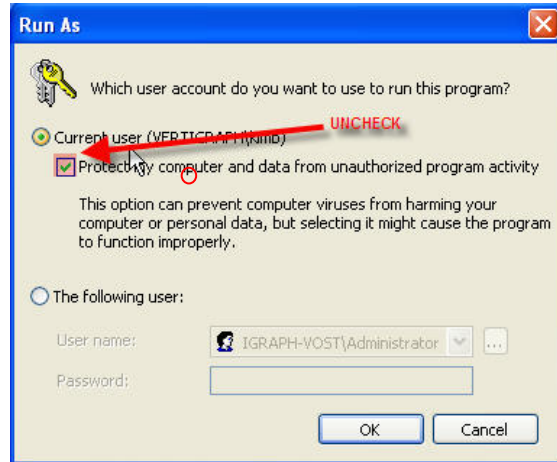
If you have any questions, suggestions or comments, please contact us at any time at 425-223-4311, 877-902-2979 or [www.interworldna.com](http://www.interworldna.com). Congratulations, you're now ready for a real project with BidPoint XL.



Updates are sent periodically to fix bugs and to update and upgrade software products. These updates are done electronically via the web and notifications are prompted weekly when available for each product. **When in doubt, you can also manually check for updates thru the programs menu option in MS Excel by clicking on the Check Updates option.** To ensure the latest version is installed and your software continues proper operation, it is imperative that updates are performed. The following will illustrate how to update the Excel Add-in Programs, BidPoint XL and BidScreen XL. Your company's full serve must be up to date in order to receive updates and upgrades.

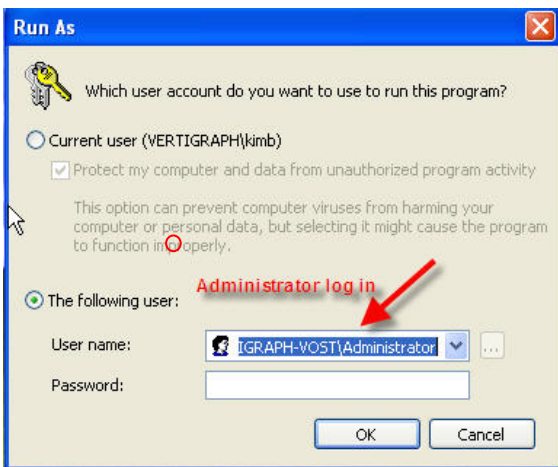


Click "Yes" to begin installing the update.

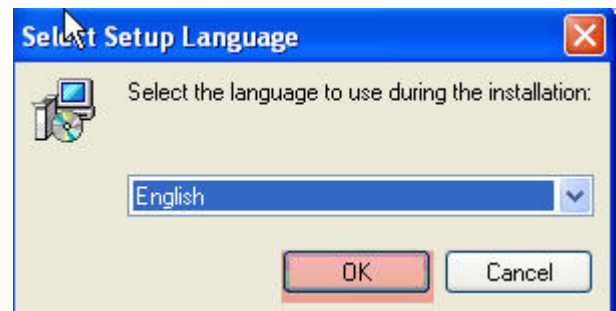


Leave as current user, if your login provides the privilege to install, and uncheck the box next to "Protect my computer..."

"An access denied" error will occur if left checked. Click ok to continue.

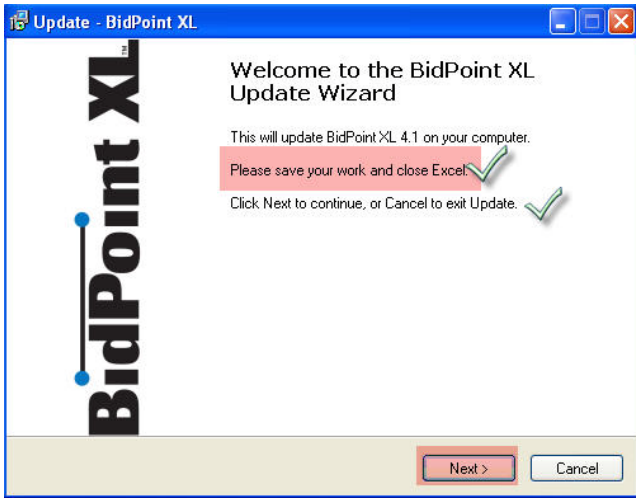


If the Current User does not have the proper privileges to install, select "The following user" and type the proper administrator login. Click ok.

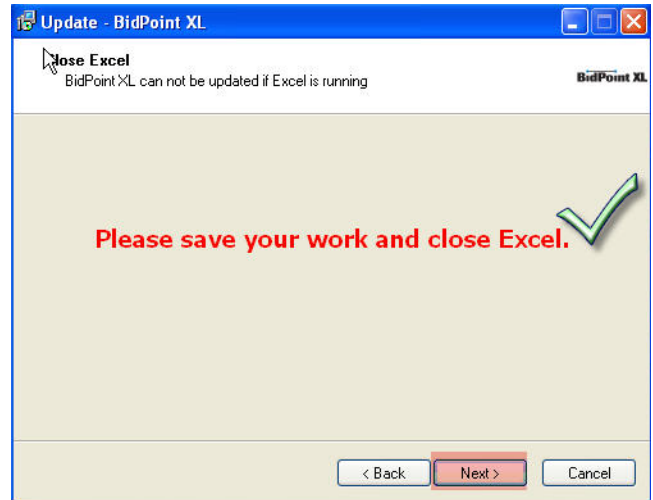


The Update Setup Wizard will begin.

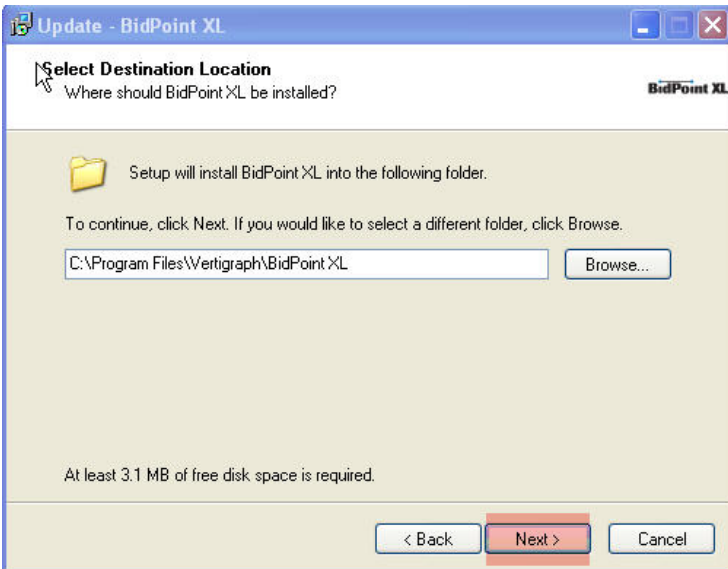
Click OK



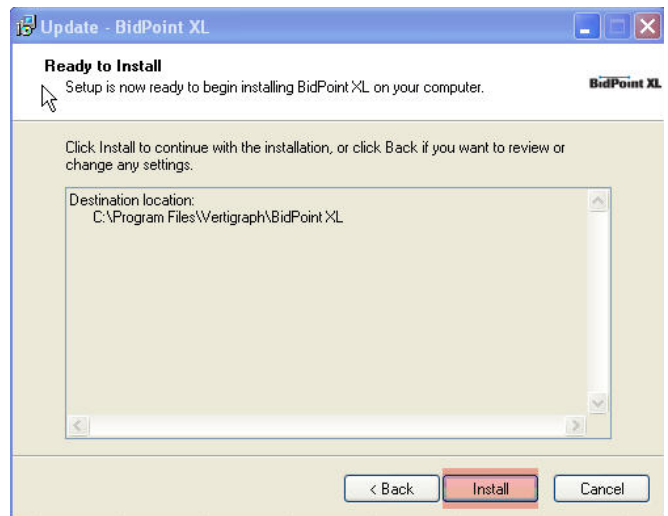
You are prompted twice to Save Your Work and Close Excel.



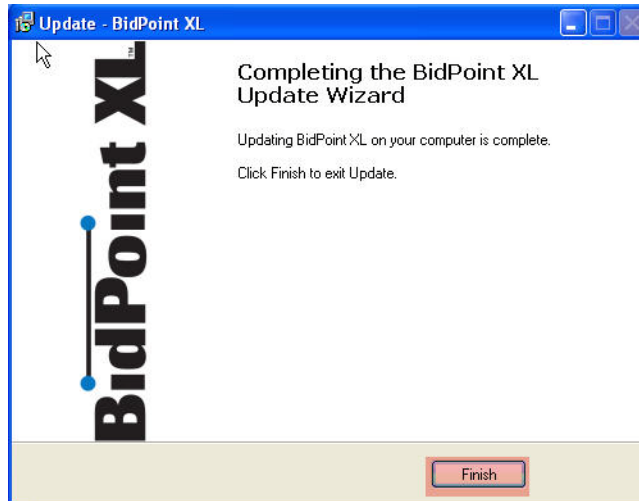
An error message will appear if the program is not closed. Save your work, Close the program as usual and Click next.



All updates are placed in this folder under the path file name. Click Next.

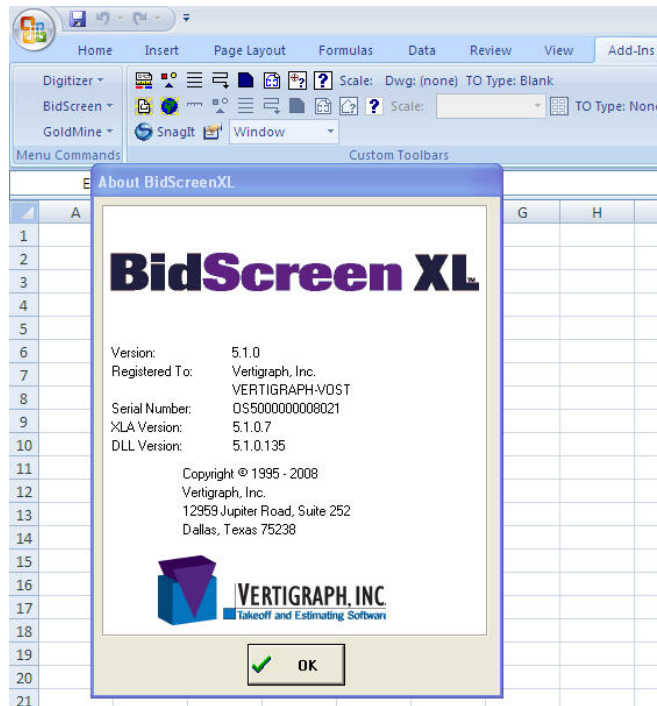


Click Install.



Click the Finish button to  
Complete the Update Wizard

**Your BidPoint XL and/or BidScreen XL software is now up to date. If you have any questions or need assistance please email [support@vertigraph.com](mailto:support@vertigraph.com) and include your Name, Company and Product Serial # located as follows:**



# Vertigraph Excel Tips & Tricks

## For BidPoint XL & BidScreen XL Software

### Excel 2007 Hotkeys/Keyboard Command Shortcuts Gone?

To view your Hotkey/Keyboard Commands open MS Excel 2007 simply depress your "Alt" key on your keyboard. This will display the new keyboard commands.

#### BidPoint XL users:

New Hotkey/Keyboard Command setup from your digitizer Tabletworks Control Panel:



Scale (or Change Drawing) = Alt + X, C, 1

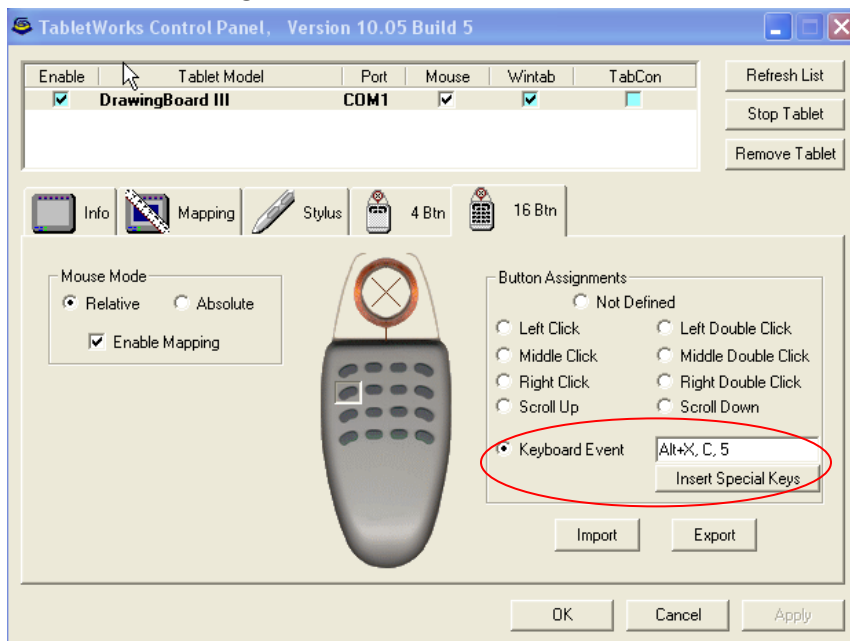
Count = Alt + X, C, 2

Section Length = Alt + X, C, 3

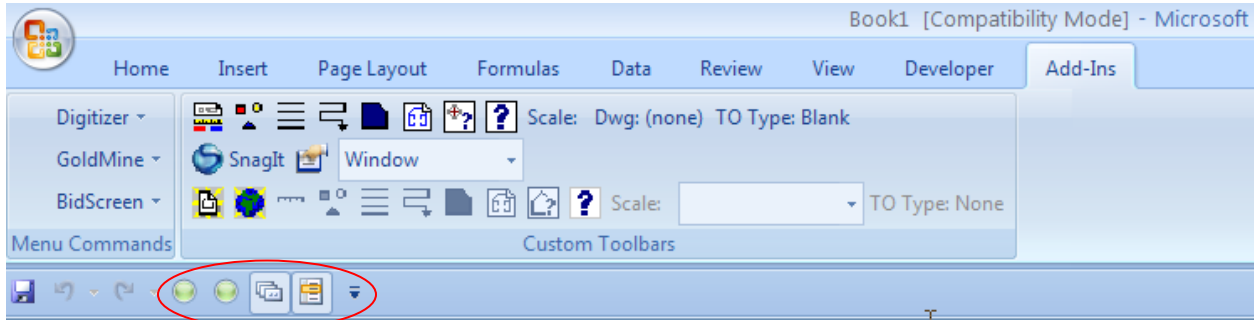
Continuous Length = Alt + X, C, 4


Area = Alt + X, C, 5

Section Length = Alt + X, C, 3

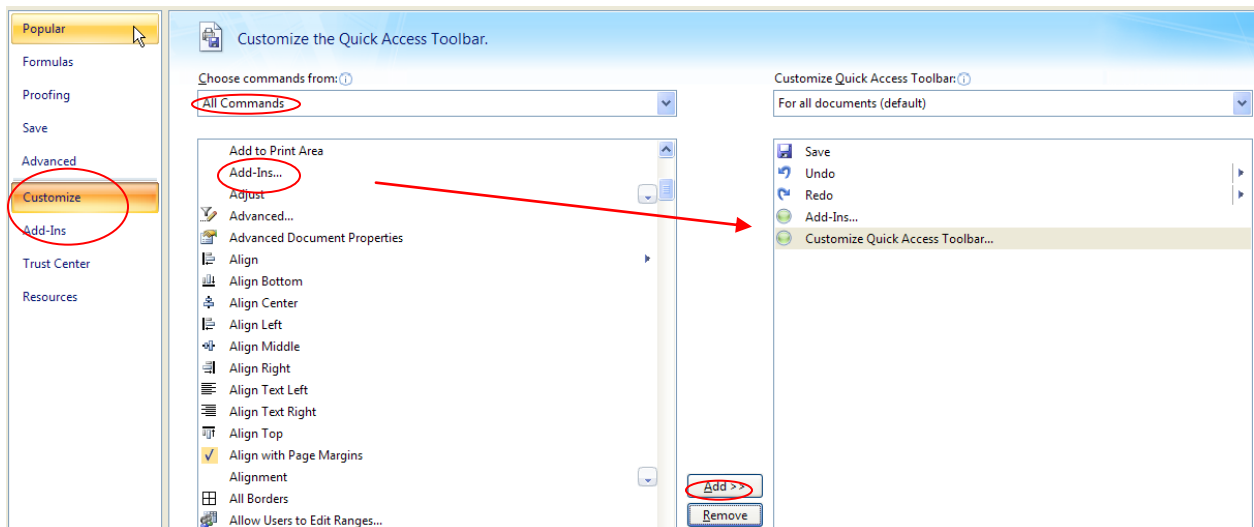


Customize your Quick Access Toolbar with your favorite functions and go straight to what your looking for!



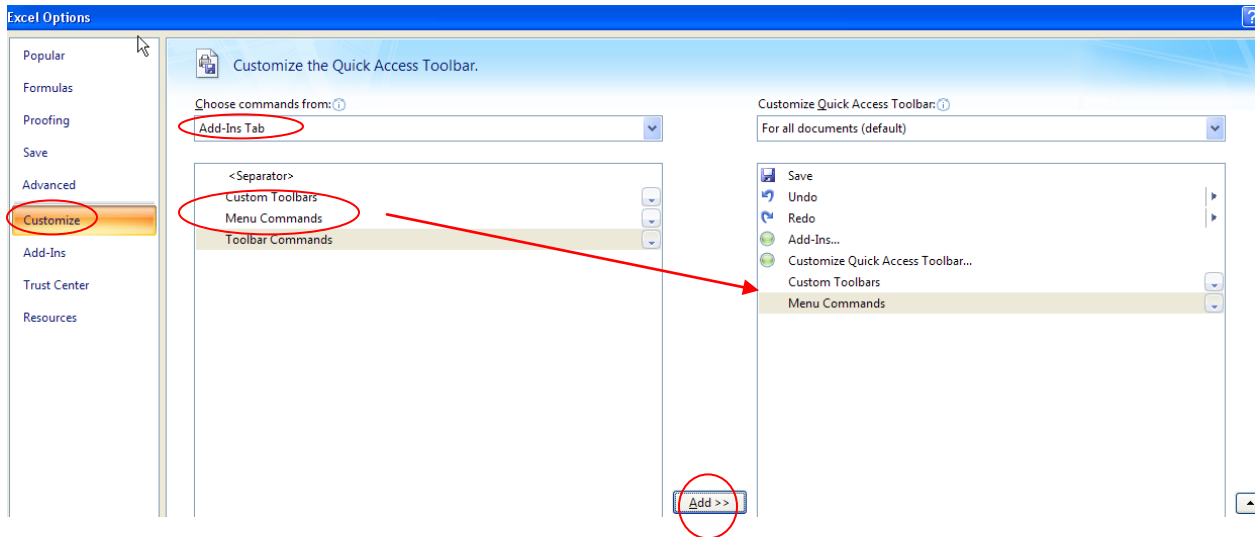
From your Office Button  in MS Excel select “Excel Options”. This will prompt you to the Excel Options window where you should select the Customize menu on the left hand side.

From the All Commands List select “Add-Ins” and then the Add button in the center of the page and select “Customize Quick Access Toolbar” and then the Add button. This will add shortcut buttons to your Add-In list and your Excel Options right on your Quick Access Toolbar.



Now add your Vertigraph software Menu and Toolbars right to your Quick Access Toolbar so they are always quickly accessible:

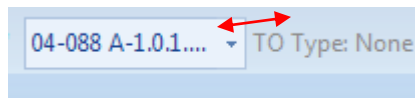
From the Customize menu on the left hand side of the Excel Options select the Add-Ins Tab. Click on Custom Toolbars and click the Add button in the center of the page and then select Menu Commands and click the Add button in the center of the page and then click OK.



### For Excel 1997 – 2003 users:

**Please note this does not apply to Excel 2007.** To increase the size of your Toolbar buttons and/or change the width of a drop-down list box on a toolbar please perform the following:

1. On the **Tools** menu in MS Excel, click **Customize**
2. Make sure the toolbar you want o change is visible.
3. With the **Customize** dialog box open, click the list box you want to change..... for example



on the **Formatting** toolbar.

4. Point to the left or right edge of the box. When the pointer changes to a double-headed arrow, drag the edge of the box to change its width.