



AUTODESK UNIVERSITY 2015

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How to Implement Fabrication ESTmep-Best Practices

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Learning Objectives

- Discover the basic concepts and necessary steps of implementing Fabrication ESTmep.
- Learn how to navigate through the Product Information Editor.
- Discover how Fabrication ESTmep links to pricing list.
- Learn how to import pricing updates.

Description

This class will cover how to implement Fabrication ESTmep software. We will provide a recommended implementation strategy, along with best practices for a smooth implementation. We will examine the Product Information Editor, ID Codes, and how pricing information is linked to items in Fabrication ESTmep software. We will also look at the Harrison Pricing Service to update the existing price list.

Your AU Experts

Lyle Janda is a technical advisor at Applied Software for the Autodesk Fabrication products. He has extensive experience in installing, training and supporting Fabrication CADmep, ESTmep, CAMduct, Tracker and RemoteEntry. Lyle previously worked as a designer and drafter for an MEP contractor. He has contributed significantly towards the creation of the Applied Configuration pack for the US market and our courseware and training materials creation efforts. Lyle is also involved with Applied Software go-to-market strategy for a best known practices knowledgebase for the Autodesk Fabrication Solutions. <http://enceptia.com/fabrication-blog/>
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Go to Applied Software's Autodesk University page to enter for a chance to win free on-line training on Autodesk products. No purchase necessary: <http://www.asti.com/au2015>

Discover the basic concepts and necessary steps of implementing Fabrication ESTmep.

Where to Start?

If you are new to the Fabrication products, you may ask yourself, “Which product do I start with”? We’ll discuss the best approach to question based on your company needs and company pain points.

Implementing Fabrication ESTmep

There are many challenges when setting up ESTmep and it may seem overwhelming at times. Let’s take a look at what is needed for ESTmep to work and how we can streamline the process.

Sheet Metal

- Bought Out vs. Fabricated
- Where does Material Cost come from?
- Where does Fabrication Cost come from?
- Where does Install Cost come from?
- How does this link to the items?

Sheet Metal Costing Data

- SMACNA
- Internal
- Supplier

Plumbing and Piping

- Where does Material Cost come from?
- Where does Fabrication Cost come from?
- Where does Install Cost come from?
- How does this link to the items?

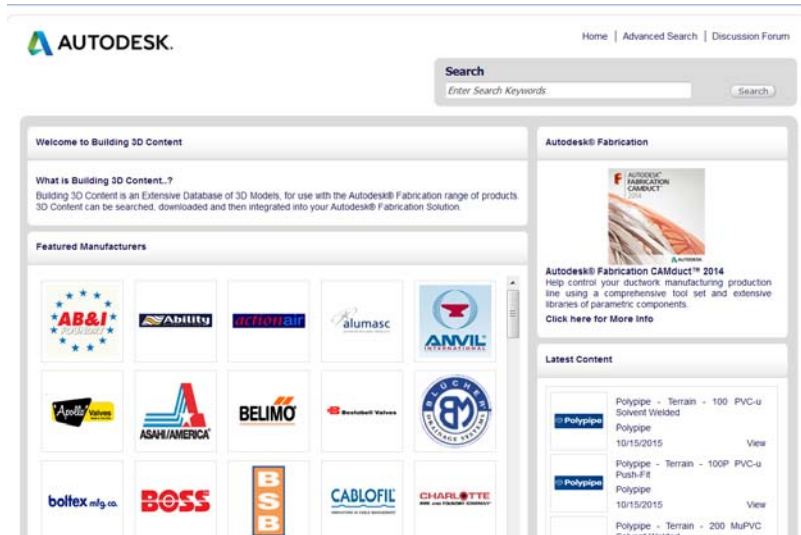
Plumbing and Piping Costing Data

- CINX (Harrison)
- PHCC
- MCAA
- Supplier



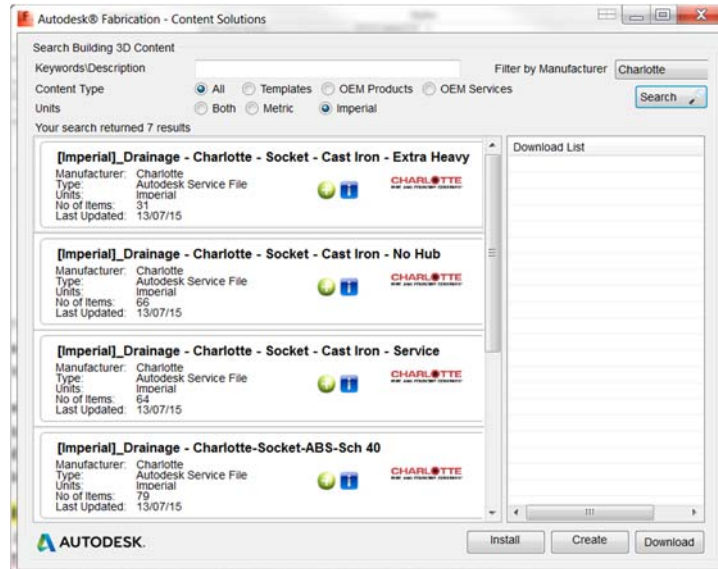
Downloading Content

The Autodesk Fabrication products include content libraries with the installation of the software. You can check for additional fabrication content from within the software or by visiting www.Building3Dcontent.com.



Building 3D Content Website

- Advanced Search
- Discussion Forum



Downloading Content within ESTmep

- Help>Download Content
- Navigate and search items
- Add, Download and access Mapprod info.



Creating Content

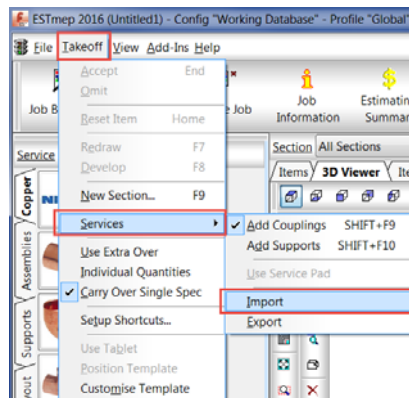
- Product Information
- Material
- Connectors
- Cost Codes
- Ancillaries

Available ITM content for download from Manufacture

- Victaulic
<http://www.victaulic.com/en/downloads/cad-files-software/autodesk-fabrication-cadmep1/>
- Uponor
<http://www.uponorpro.com/Catalog/Cover.aspx>
- Viega
<http://viega.thomasnet-navigator.com/>

Navigating Through Fabrication ESTmep

Importing Services (.IEZ)



Item Takeoff

- Customize header layout on Item Tab
- Cost Breakdown
- Item Properties
 - ID Code
 - Costing Tab
 - Pricing Hyper links
- Harrison codes are not linked to the ADSK code until they are added to the Product Information Editor (Mapprod).



Learn how to navigate through the Product Information Editor.

Product Information Editor (Mapprod)

Id	Group	Manufacturer	Product	Description	Size	Material	Specification	Install Type	Source Des.	Range	Fini
VIC_A040010PW4	Mechanical	Victaulic	A040010PW4	VIC #10-CS S..	4	Pipe Systems.. Mechanical..	Grooved	VIC #10-CS S..			
VIC_A040011PH0	Mechanical	Victaulic	A040011PH0	VIC #11-C 4S..	4	Pipe Systems.. Mechanical..	Grooved	VIC #11-C 4S..			
VIC_A040012PC0	Mechanical	Victaulic	A040012PC0	VIC #12-C 22..	4	Pipe Systems.. Mechanical..	Grooved	VIC #12-C 22..			
VIC_A040013PD0	Mechanical	Victaulic	A040013PD0	VIC #13-C 11..	4	Pipe Systems.. Mechanical..	Grooved	VIC #13-C 11..			
VIC_A040020PG0	Mechanical	Victaulic	A040020PG0	VIC #20-CB ..	4	Pipe Systems.. Mechanical..	Grooved	VIC #20-CB ..			
VIC_A040020PH0	Mechanical	Victaulic	A040020PH0	VIC #20-C TE..	4	Pipe Systems.. Mechanical..	Grooved	VIC #20-C TE..			
VIC_A040020PW1	Mechanical	Victaulic	A040020PW1	VIC #20-CS S..	4	Pipe Systems.. Mechanical..	Grooved	VIC #20-CS S..			
VIC_A040030PD0	Mechanical	Victaulic	A040030PD0	VIC #30-C LA..	4	Pipe Systems.. Mechanical..	Grooved	VIC #30-C LA..			
VIC_A040033PC0	Mechanical	Victaulic	A040033PC0	VIC #33-C TR..	4	Pipe Systems.. Mechanical..	Grooved	VIC #33-C TR..			
VIC_A040033PD0	Mechanical	Victaulic	A040033PD0	VIC #35-C C..	4	Pipe Systems.. Mechanical..	Grooved	VIC #35-C C..			
VIC_A040060PD0	Mechanical	Victaulic	A040060PD0	VIC #60-C C..	4	Pipe Systems.. Mechanical..	Grooved	VIC #60-C C..			
VIC_A040100PD0	Mechanical	Victaulic	A040100PD0	VIC #100-C 9..	4	Pipe Systems.. Mechanical..	Grooved	VIC #100-C 9..			
VIC_A040100PG0	Mechanical	Victaulic	A040100PG0	VIC #100-CB ..	4	Pipe Systems.. Mechanical..	Grooved	VIC #100-CB ..			
VIC_A040100PS0	Mechanical	Victaulic	A040100PS0	VIC #100-CF ..	4	Pipe Systems.. Mechanical..	Grooved	VIC #100-CF ..			
VIC_A060010PG0	Mechanical	Victaulic	A060010PG0	VIC #10-CB 9..	6	Pipe Systems.. Mechanical..	Grooved	VIC #10-CB 9..			
VIC_A060010PH0	Mechanical	Victaulic	A060010PH0	VIC #10-C 90..	6	Pipe Systems.. Mechanical..	Grooved	VIC #10-C 90..			
VIC_A060010PS0	Mechanical	Victaulic	A060010PS0	VIC #10-CF 9..	6	Pipe Systems.. Mechanical..	Grooved	VIC #10-CF 9..			
VIC_A060010PW4	Mechanical	Victaulic	A060010PW4	VIC #10-CS S..	6	Pipe Systems.. Mechanical..	Grooved	VIC #10-CS S..			
VIC_A060011PH0	Mechanical	Victaulic	A060011PH0	VIC #11-C 4S..	6	Pipe Systems.. Mechanical..	Grooved	VIC #11-C 4S..			
VIC_A060013PC0	Mechanical	Victaulic	A060013PC0	VIC #13-C 11..	6	Pipe Systems.. Mechanical..	Grooved	VIC #13-C 11..			

Show Information

- The Show Information Tab is used to store all of the product information and ADSK ID codes. This information is most commonly used when creating reports. When downloading content, this information is automatically inserted inside the Product Information Editor but can be manually added as well.
 - Use the drop sown menus to create filters.
 - Use the Edit tab to manipulate the data
 - The Green New button located at the bottom is used to paste information from excel.

Id	4) UPC Code	1) Manufact.	2) OEM Code	3) Harrison
ADSK_30085082	054211184110	163-4251-01..	4251-010-Sc..	317550340
ADSK_30084203	054211184134	163-4251-012	4251-012	317550342
ADSK_30085083	054211184134	163-4251-01..	4251-012-Sc..	317550342
ADSK_30084204	054211184158	163-4251-015	4251-015	317550344
ADSK_30085084	054211184158	163-4251-01..	4251-015-Sc..	317550344
ADSK_30084205	054211184172	163-4251-020	4251-020	317550346
ADSK_30085085	054211184172	163-4251-02..	4251-020-Sc..	317550346
ADSK_30084206	054211184196	163-4251-025	4251-025	317550348
ADSK_30085086	054211184196	163-4251-02..	4251-025-Sc..	317550348
ADSK_30084211	054211185070	163-4254-030	4254-030	317550350
ADSK_30085091	054211185070	163-4254-03..	4254-030-Sc..	317550350
ADSK_30084191	054211184653	163-4253-007	4253-007	317550360
ADSK_30085071	054211184653	163-4253-00..	4253-007-Sc..	317550360
ADSK_30084192	054211184677	163-4253-010	4253-010	317550362
ADSK_30085072	054211184677	163-4253-01..	4253-010-Sc..	317550362
ADSK_30084193	054211184691	163-4253-012	4253-012	317550364
ADSK_30085073	054211184691	163-4253-01..	4253-012-Sc..	317550364
ADSK_30084194	054211184714	163-4253-015	4253-015	317550366
ADSK_30085074	054211184714	163-4253-01..	4253-015-Sc..	317550366
ADSK_30084195	054211184738	163-4253-020	4253-020	317550368
ADSK_30085075	054211184738	163-4253-02..	4253-020-Sc..	317550368
ADSK_30084196	054211184752	163-4253-025	4253-025	317550370

Show Suppliers

- The show Suppliers tab is used to add the supplier cod and link it to the ADSK ID code. By default the UPC Code, Manufacture ID, OEM Code and Harrison Code are included. New Suppliers can be added or deleted.
 - The Green New Button is used to import excel information.
 - If subscribed to CINX (Harrison), they will send you a pricing updated that will use these same codes.
 - This information can also be used in reports.



- The supplier data will need to be imported separately when downloading content.
- Open CSV file from the content Download
- When downloading content from the Building 3D Content website, you will need to import the Mapprod information along with the Supplier Information from the CSV file provided in the download.
 - The Product Information will be ID-Finish.
 - The Supplier Information will be Manufacture-UPC Code.

Example of Excel Sheet for Data Entry (Table Builder)

[illegible]

- Table Builder is an excel spreadsheet that is used to help manage the Product Information and Supplier Information. This excel spreadsheet helps speed up the process of importing the information into the Product Information Editor.

Discover how Fabrication ESTmep links to pricing list.

Updating Pricing List

There are multiple ways to update a price list in the Fabrication ESTmep database. You will learn how to download a price list update from CINX and import the CSV file with the program.

Database Costing Overview

- The costing portion of the Database Is used to setup and maintain the Price List, Fabrication Times, Installation Times, Labor Rates and other costing information.

The screenshot shows the 'Costing' tab in the software interface. It includes fields for 'Supplier Group' (Harrison), 'Carriage' (0.0 %), 'Material Overheads' (0.0 %), 'Price List' (Harrison List Prices), 'Generic Name', and 'Original Pricing' (None). Below these fields is a table with columns: Id, Cost, Discount, Units, Date, Status, Harrison, OEM, Description, Size, Material, and Install. The table lists various copper tubing items with their respective costs and discounts.

Id	Cost	Discount	Units	Date	Status	Harrison	OEM	Description	Size	Material	Install.
ADSK_30001296	1.86	Cerro	per (ft)	None	Active	010C 8767A	Cerro	Type I Hard Copper	1/4"	Copper	Tube
ADSK_30001280	1.86	Cerro	per (ft)	None	Active	010C 8767A	Cerro	Type I Hard Copper (Grv)	1/4"	Copper	Tube
ADSK_30001343	2.12	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB887A	Generic	Pipe-B88-CU-LI(PS)	1/4"	Copper	Plain E...
ADSK_30001777	2.12	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB887A	Generic	Pipe-B88-CU-LI(Gr)	1/4"	Copper	Groov...
ADSK_30001297	2.84	Cerro	per (ft)	None	Active	010C 8771A	Cerro	Type I Hard Copper	3/8"	Copper	Tube
ADSK_30001281	2.84	Cerro	per (ft)	None	Active	010C 8771A	Cerro	Type I Hard Copper (Grv)	3/8"	Copper	Tube
ADSK_30001744	3.33	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB891A	Generic	Pipe-B88-CU-LI(PE)	3/8"	Copper	Plain E...
ADSK_30001778	3.33	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB891A	Generic	Pipe-B88-CU-LI(Gr)	3/8"	Copper	Groov...
ADSK_30001298	3.24	Cerro	per (ft)	None	Active	010C 8775A	Cerro	Type I Hard Copper	1/2"	Copper	Tube
ADSK_30001282	3.24	Cerro	per (ft)	None	Active	010C 8775A	Cerro	Type I Hard Copper (Grv)	1/2"	Copper	Tube
ADSK_30001745	4.16	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB895A	Generic	Pipe-B88-CU-LI(PE)	1/2"	Copper	Plain E...
ADSK_30001779	4.16	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB895A	Generic	Pipe-B88-CU-LI(Gr)	1/2"	Copper	Groov...
ADSK_30001299	4.99	Cerro	per (ft)	None	Active	010C 8779A	Cerro	Type I Hard Copper	5/8"	Copper	Tube
ADSK_30001283	4.99	Cerro	per (ft)	None	Active	010C 8779A	Cerro	Type I Hard Copper (Grv)	5/8"	Copper	Tube
ADSK_30001746	5.73	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB899A	Generic	Pipe-B88-CU-LI(PE)	5/8"	Copper	Plain E...
ADSK_30001300	5.26	Cerro	per (ft)	None	Active	010C 8783A	Cerro	Type I Hard Copper	3/4"	Copper	Tube
ADSK_30001284	5.26	Cerro	per (ft)	None	Active	010C 8783A	Cerro	Type I Hard Copper (Grv)	3/4"	Copper	Tube
ADSK_30001747	6.37	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB903A	Generic	Pipe-B88-CU-LI(PE)	3/4"	Copper	Plain E...
ADSK_30001780	6.37	COPPER TUBING	per (ft)	11/26/2013	Active	010MUB903A	Generic	Pipe-B88-CU-LI(Gr)	3/4"	Copper	Groov...
ADSK_30001301	8.05	Cerro	per (ft)	None	Active	010C 8787A	Cerro	Type I Hard Copper	1"	Copper	Tube

- Costing Tab>Price List
 - **Supplier Group:** Name of the supplier wanting to be displayed and categorized in Estimate Summary. Used to group price list together from the same supplier ensuring the summaries/reports isolate the cost of each supplier across multiple price list.
 - **Carriage:** Additional Nett cost added to the price. Example: Used for a transportation percentage from the Supplier to site if there were charges for delivery.
 - **Material Overheads:** extra supplier based percentage mark up for inclusion into Gross cost calculations.
 - **Price List:** Name of the Price list contained within the Supplier group. This is the table name assigned to the M-Rate field of each item.
 - **Generic Name:** Used for grouping price lists that contain the same product codes but from an alternative supplier.
 - **Setup Discounts:** Discounts are available for assignment to each code in the price list. You can assign a discount code to each of the product codes in the price list. The calculation can be a percentage decrease/increase or by a factory/multiplier.



Learn how to import pricing updates.

CINX

CINX Addin Tool (Beta)



- CINX has a new Addin Tool that will help streamline the pricing updates inside of ESTmep.

CINX Website Overview

- CINX is a web-based tool that is used to request and download pricing updates.
- General Navigation
 - Custom Download
 - Search by download
- Export CSV file.

Item Folders Overview

- The Item Folders can be used to add a new price list or change a price list to multiple items. When changing the price list at the Item Folder level, this will be a global change throughout the program. Any new items taken off from a service, will reflect the new price list change.
 - Changing the view to Details, shows the Item Properties information.
 - Once the price list has been changed at the Item Folder Level, you will need to update any items in the job.



File Management

- MAJ Files
 - Automatically links to the current database
- ESJ Files
 - Archive Jobs that saves a snapshot of the current database into the ESJ file.
- Batch Jobs Together
 - Combining multiple MAJ files together.
- Job Browser

