

## Digital Production Control – Job Prep

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This Quick Start Guide will help you setup your existing, interactive project to be used with Digital Production Control.

This Guide assumes you have already created and priced your project and are ready to move it to DPC Mode.

All of your program and database settings should already be completed for use with DPC - if not, review the [DPC-Initial Setup Quick Start Guide](#).

### User Scenarios

There are two ways to use Digital Production Control depending on the business practices.

#### Single User Scenario:

If the Project Manager handles the actual takeoff operations and reporting of production completion percentages, then the Project Manager will need both a tko and a dpc-project manager license. This gives the Project Manager use of On-Screen Takeoff and Digital Production Control programs.

#### Dual User Scenario:

In a typical dual user scenario, **Project Managers** are responsible for creating employee files, analyzing bids, budget tracking, and reviewing and approving timesheets. The Project Manager needs tko and dpc-project manager licenses.

**Foremen** are responsible for entering production completion percentage information, entering timecard data, and creating notes to explain production. The Foreman will have access to all drawings and plans from On-Screen Takeoff and will be able to apply production control to the job, but will not be able to make changes to takeoffs. The Foreman needs a dpc-foreman license only.

[01 - Preparing your bid for use with DPC](#)

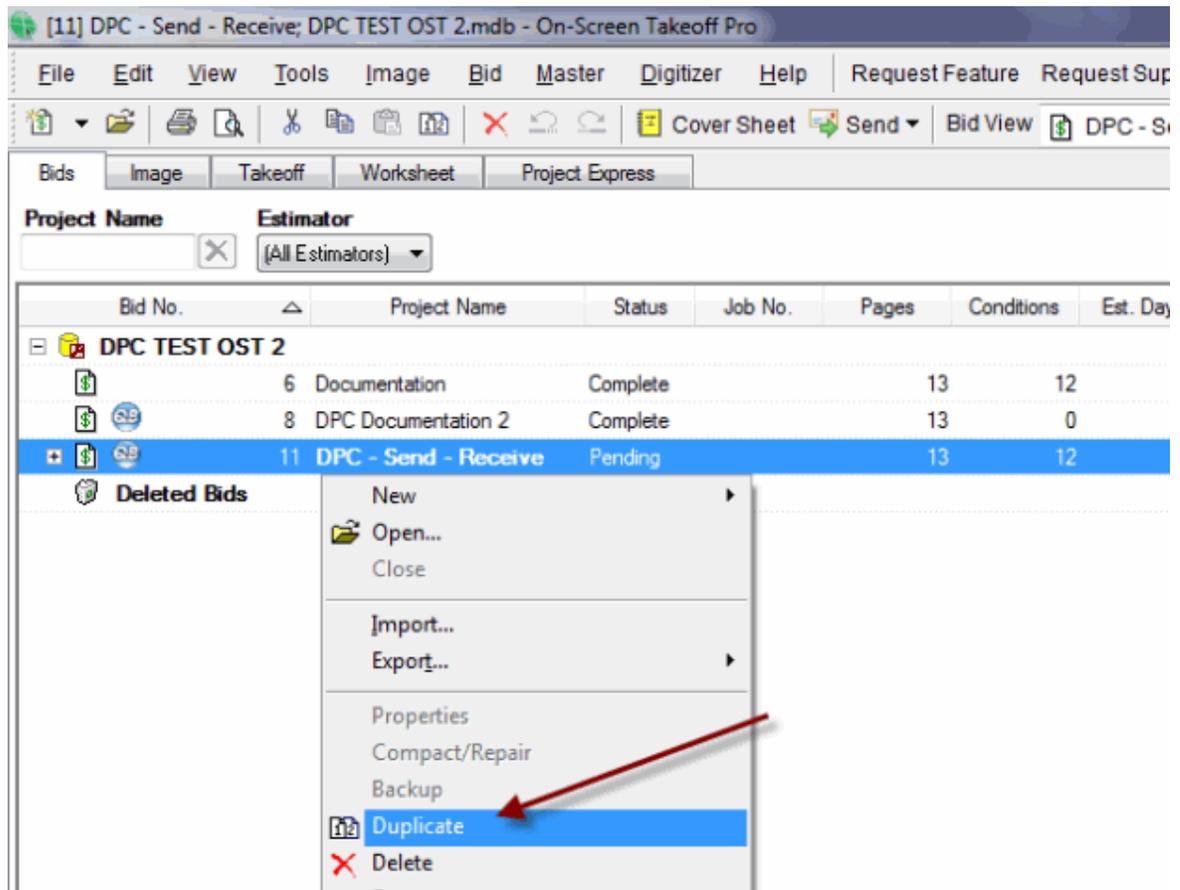
## 01 - Preparing your bid for use with DPC

In the past you may have duplicated a bid many times. When using DPC you must keep ONE bid throughout the life of the job. You and the foreman will be sharing this one synchronized bid file.



**We will make one archive copy of your base bid and THAT'S IT.**

- Open the job in On Screen Takeoff
- Click the Cover Sheet button
- Verify that the job is priced using **Quick Bid Interactive**
- Verify that you have used Typical Groups and Repeating Pages - **do NOT use Typical Areas**
- Return to the Bids Tab in On-Screen Takeoff (always duplicate an Interactive bid from On-Screen Takeoff)
- Duplicate the bid, **when prompted to duplicate the Quick Bid job, click YES**





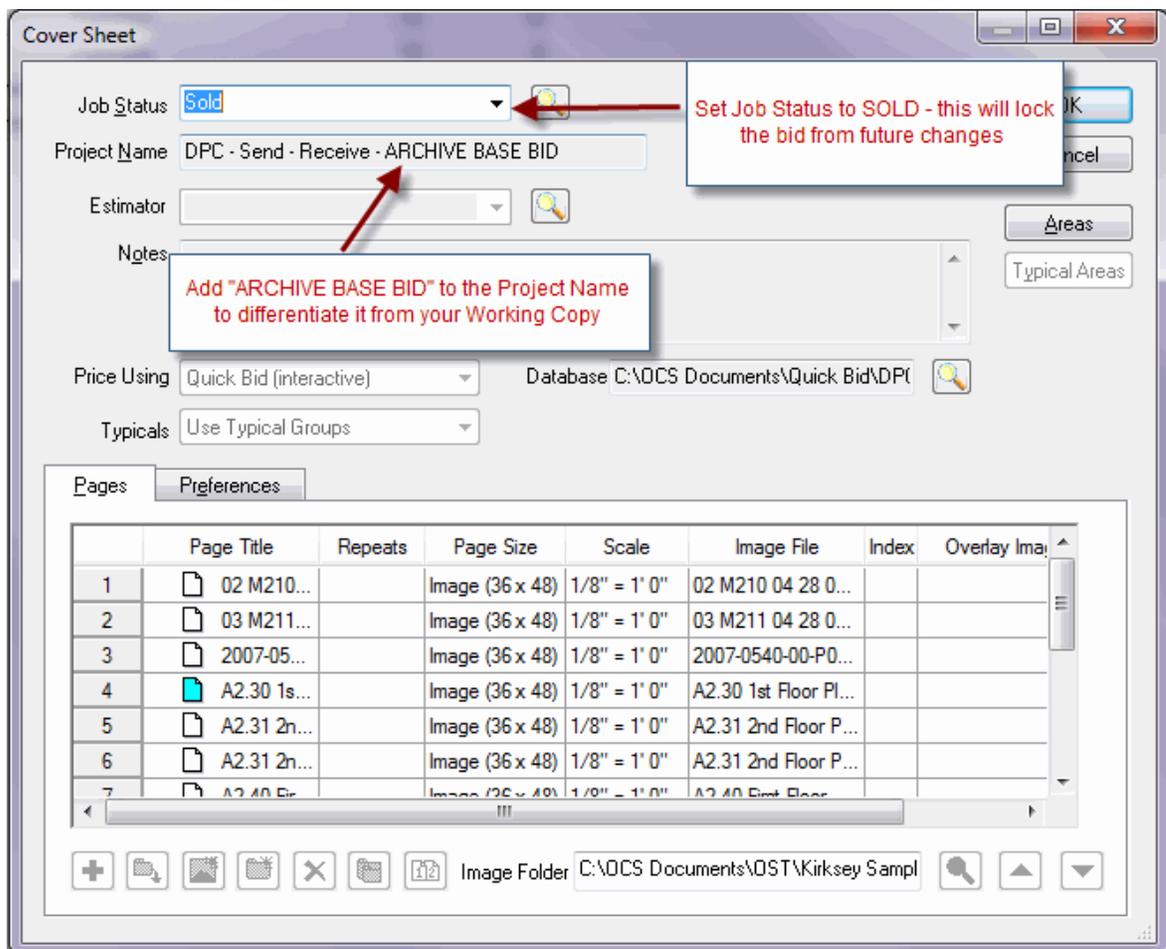
**Once you send a project to the field, you must not move it to a different database or folder nor rename it.**

[02 - Archive Original Bid](#)

## 02 - Archive Original Bid

 **We will make one archive copy of your base bid and THAT'S IT.**

- On the Bids Tab, select the *Original Bid* (not the duplicate copy)
- Go to the Cover Sheet
- Change the Job Status to "Sold"
- Add "ARCHIVE - BASE BID" to Project Name
- Consider this an **archive** copy of bid - do not use it going forward



Cover Sheet

Job Status: **Sold**

Project Name: DPC - Send - Receive - ARCHIVE BASE BID

Estimator: [Empty]

Notes: [Empty]

Price Using: Quick Bid (interactive) Database C:\OCS Documents\Quick Bid\DPF

Typicals: Use Typical Groups

Set Job Status to SOLD - this will lock the bid from future changes

Add "ARCHIVE BASE BID" to the Project Name to differentiate it from your Working Copy

Page	Page Title	Repeats	Page Size	Scale	Image File	Index	Overlay Image
1	02 M210...		Image (36 x 48)	1/8" = 1' 0"	02 M210 04 28 0...		
2	03 M211...		Image (36 x 48)	1/8" = 1' 0"	03 M211 04 28 0...		
3	2007-05...		Image (36 x 48)	1/8" = 1' 0"	2007-0540-00-P0...		
4	A2.30 1s...		Image (36 x 48)	1/8" = 1' 0"	A2.30 1st Floor Pl...		
5	A2.31 2n...		Image (36 x 48)	1/8" = 1' 0"	A2.31 2nd Floor P...		
6	A2.31 2n...		Image (36 x 48)	1/8" = 1' 0"	A2.31 2nd Floor P...		
7	A2.40 5r...		Image (36 x 48)	1/8" = 1' 0"	A2.40 5th Floor		

Image Folder: C:\OCS Documents\OCS\Kirksey Sampl

## [03 - Budget Copy of Bid](#)

## 03 - Budget Copy of Bid

- On the Bids Tab, select the Duplicate Bid
- Open the Cover Sheet
- Add "BUDGET" to the Project Name
- Job Status should be "In Progress"
- This is your **working copy** for the duration of the job

Keep the Project Name under 27 characters and do not use any special characters - Alpha-Numeric only (no punctuation, no dollar signs, ampersands, etc.)

Cover Sheet

Job Status: In Progress

Project Name: DPC - Send - Receive - BUDGET

Estimator: [Empty]

Notes: [Empty]

Price Using: Quick Bid (interactive)

Database: C:\DCS Documents\Quick Bid\DP...

Typical Groups: Use Typical Groups

Buttons: OK, Cancel, Areas, Typical Areas

Callouts:

- Set Job Status to "In Progress"
- Add "BUDGET" to the Project Name

Pages | Preferences

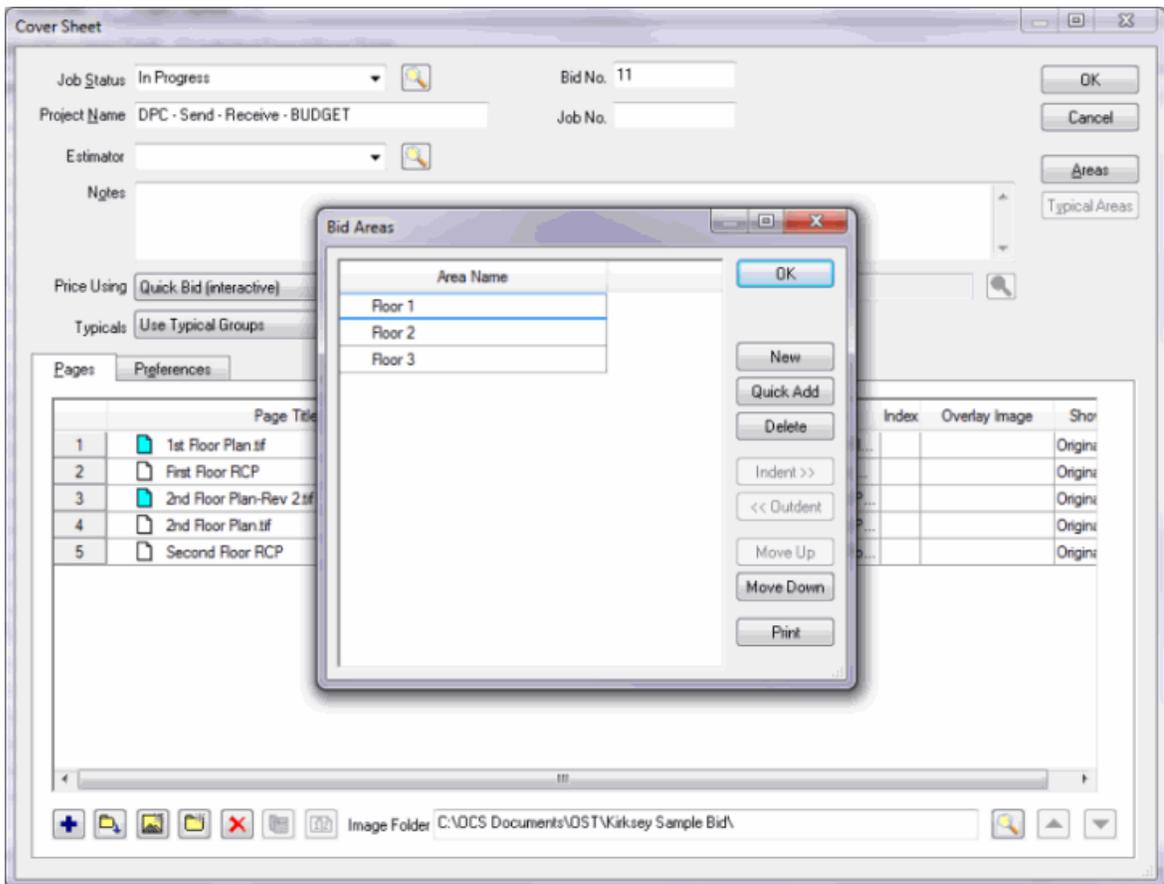
	Page Title	Repeats	Page Size	Scale	Image File	Index	Overlay Image
1	02 M210...		Image (36 x 48)	1/8" = 1' 0"	02 M210 04 28 0...		
2	03 M211...		Image (36 x 48)	1/8" = 1' 0"	03 M211 04 28 0...		
3	2007-05...		Image (36 x 48)	1/8" = 1' 0"	2007-0540-00-P0...		
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6	A2.31 2n...		Image (36 x 48)	1/8" = 1' 0"	A2.31 2nd Floor P...		
7	A2.40 E...		Image (36 x 48)	1/8" = 1' 0"	A2.40 Est Floor		

Image Folder: C:\DCS Documents\DST\Kirksey Sampl

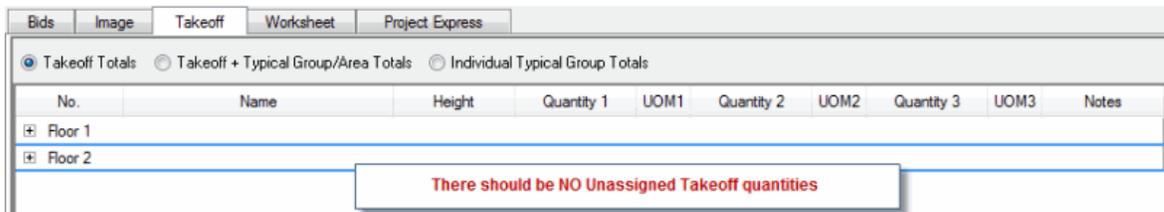
## 04 - Setup Bid Areas

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- Open Cover Sheet of the "Budget" project
- Click **Areas**
- Review Areas and/or create as needed
- Assign all of your takeoff to the appropriate Bid Area - see the On-Screen Takeoff User Guide for instructions



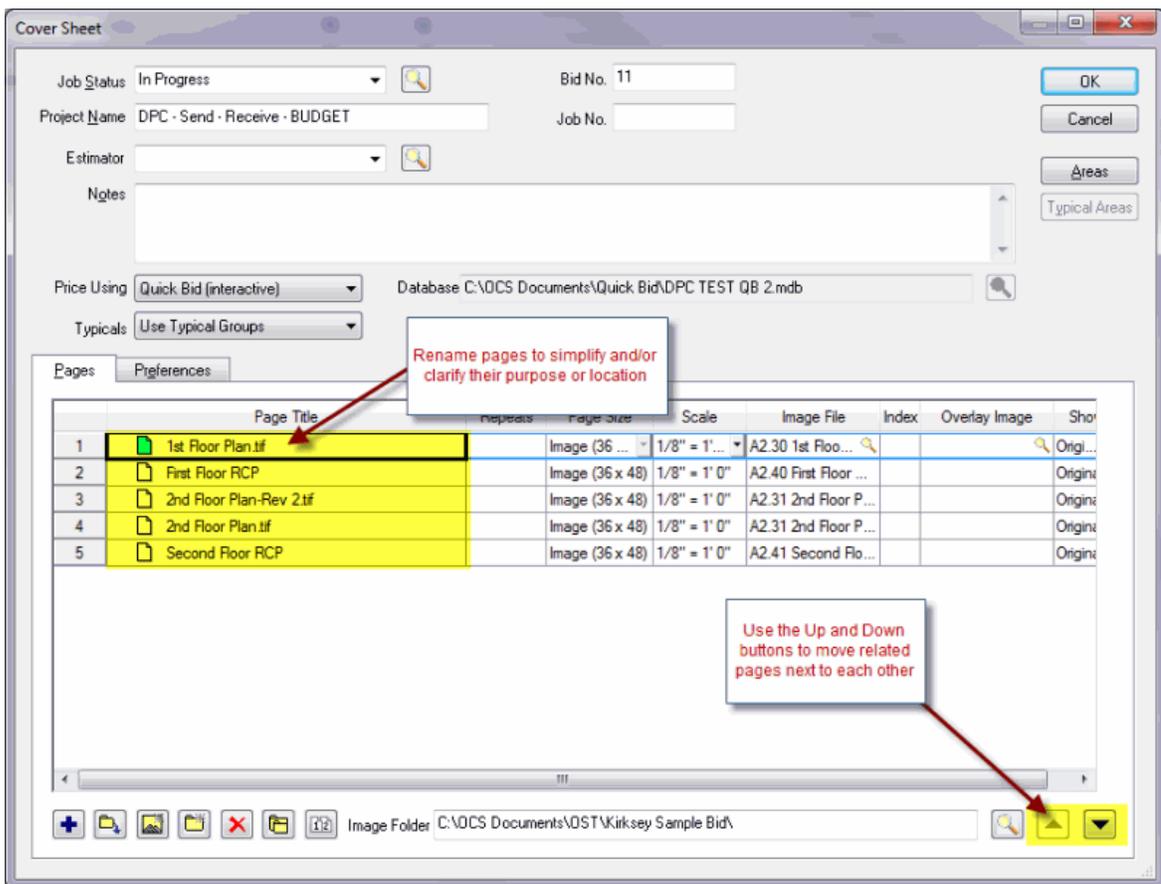
- Confirm you have NO takeoff in "Unassigned" (check the Takeoff Tab, Grouped by Area, Collapsed)



## [05 - Collate the Drawings in the Job](#)

## 05 - Collate the Drawings in the Job

- Open Cover Sheet of the "Budget" project
- Click on a Page Title, then use the up  and down  arrows to sort the plan documents the way the job will be worked. For example, on a 2 floor project with floor plans and ceiling plans, you might organize it by floor 1, ceiling 1, floor 2, ceiling 2, etc. Try to keep the job organized in a way that will make working in the project easy.



- Rename any Page Title to something more **Foreman-friendly** by clicking on the existing name and typing in a new name
- Each page must have a unique Page Title
- Each Alternate and Change Order must have a unique name

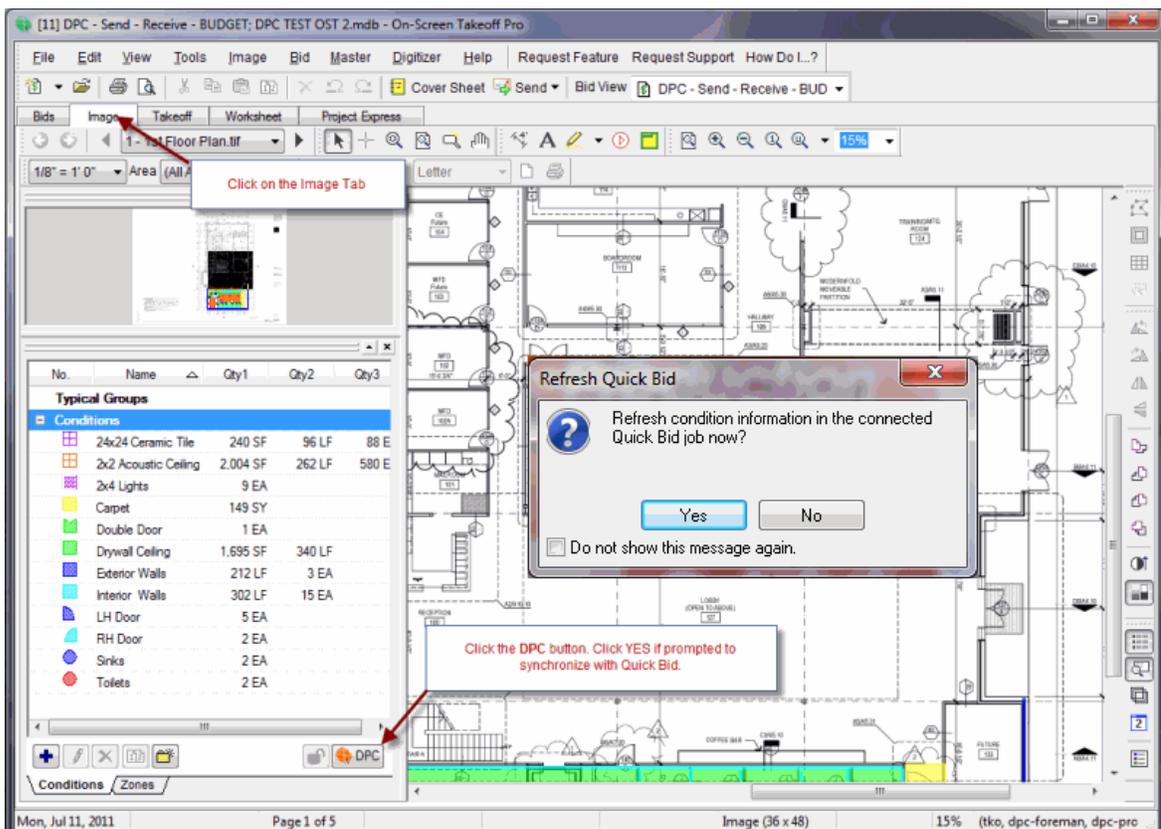
## [06 - Convert Job to DPC Mode](#)

## 06 - Convert Job to DPC Mode

- Make sure you are in the correct job (the "BUDGET" copy)
- Make sure the job is in Quick Bid - Interactive mode
- Click on the Image tab
- Click the DPC button  in the Conditions window

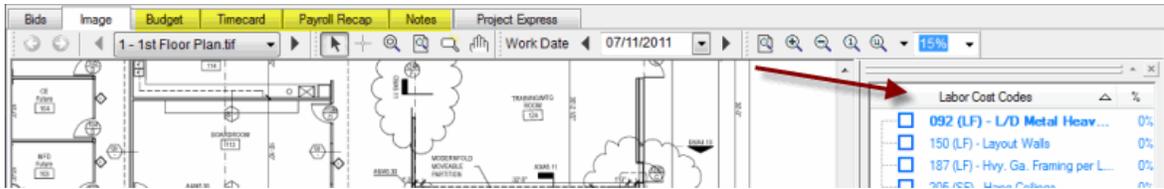
***This prepares the job for DPC using takeoff (On-Screen Takeoff) and estimate (Quick Bid) data.***

- Notice the tabs change to Bid, Image, **Budget**, **Timecard**, **Payroll Recap**, **Notes**, and Project Express



After activating DPC Mode there are several new tabs added to the interface and a new Labor Cost Codes window:

## 06 - Convert Job to DPC Mode

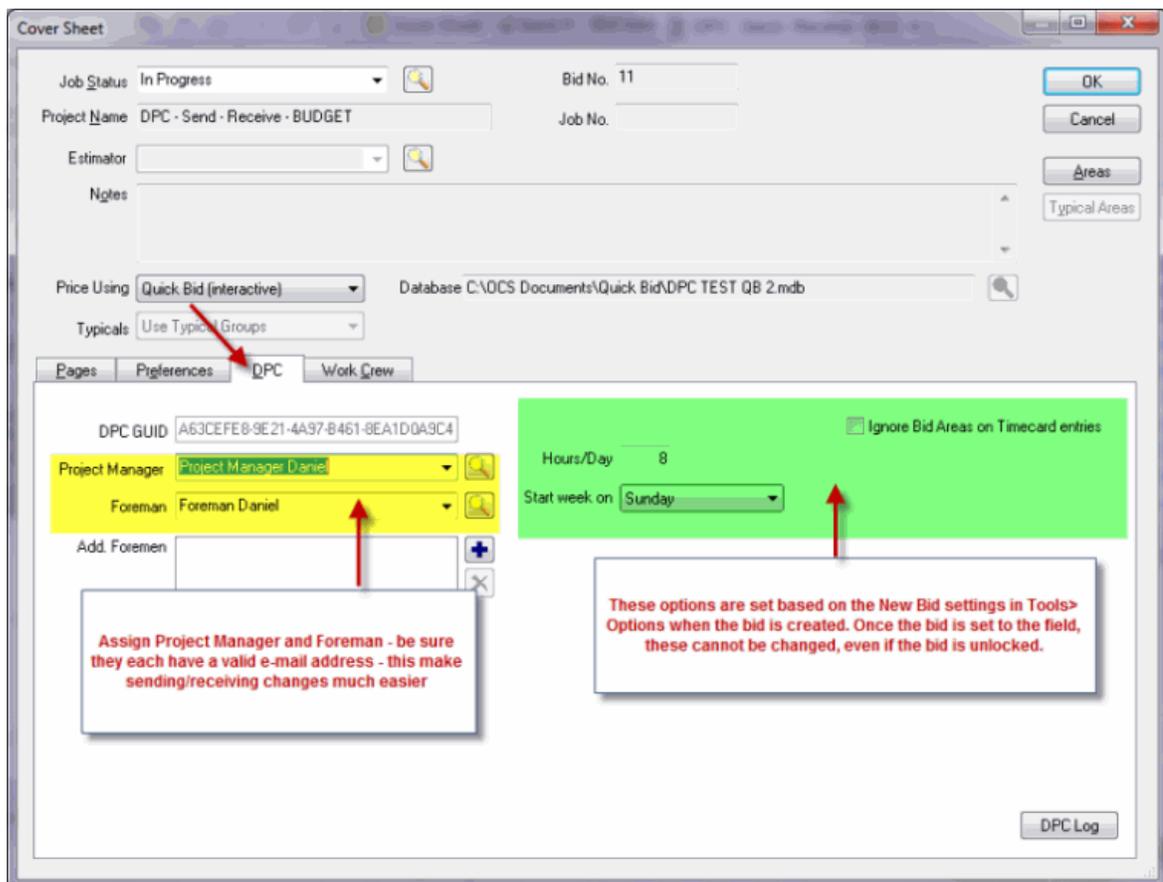


Your cost codes are color coded based on their progress: **Blue** (not started), **Green** (on Budget) **Orange** (over budget by <5%) or **Red** (over budget by 5% or more).

## [07 - Assign Project Manager and Foremen to job](#)

## 07 - Assign Project Manager and Foremen to job

- Open the Cover Sheet for the project
- Click on the DPC tab (this tab only becomes visible when a bid is in DPC Mode)
- Click the lookup button  next to Project Manager to open the Employee screen



Cover Sheet

Job Status: In Progress Bid No. 11

Project Name: DPC - Send - Receive - BUDGET Job No.

Estimator

Notes

Price Using: Quick Bid (interactive) Database: C:\VCS Documents\Quick Bid\DPC TEST QB 2.mdb

Typicals: Use Typical Groups

Pages: Preferences **DPC** Work Crew

DPC GUID: A63CEFE8-9E21-4A97-B461-8EA1D0A9C4

Project Manager: Project Manager Daniel

Foreman: Foreman Daniel

Add Foremen

Hours/Day: 8

Start week on: Sunday

Ignore Bid Areas on Timecard entries

Assign Project Manager and Foreman - be sure they each have a valid e-mail address - this make sending/receiving changes much easier

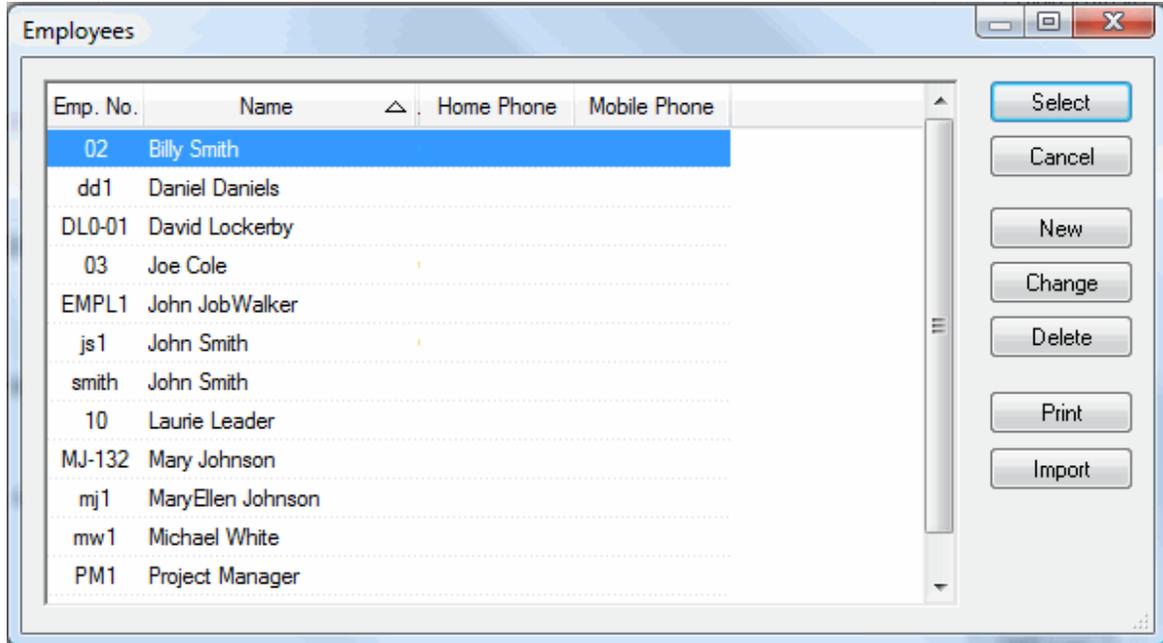
These options are set based on the New Bid settings in Tools> Options when the bid is created. Once the bid is set to the field, these cannot be changed, even if the bid is unlocked.

DPC Log

continued...

## 07 - Assign Project Manager and Foremen to job

The Employee list will open. If the project manager and/or foreman are already listed, choose them from the list. If not, see Step 10 for instructions on adding them.



Choose an existing Employee and Click **OK**

***Be sure Project Manager and Foremen have e-mail addresses listed in their Employee Details.***

If the Project Manager and/or Foreman are not listed in the Employee List, add them.

[08 - Adding a Project Manager and/or Foreman to Employee List](#)

## 08 - Adding a Project Manager and/or Foreman to Employee List

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If the Project Manager and Foremen already existing in your database, you can skip to the next step.

### To add an Employee

- Click **New** on the Employee screen
- On the Employee Detail screen, enter the Project Manager's or Foreman's
  - First name
  - Last name
  - Employee number
  - E-mail address
  - Click **OK**

The screenshot displays two overlapping windows from a software application. The top window, titled 'Employees', contains a table with the following data:

Emp. No.	Name	Home Phone	Mobile Phone
02	Billy Smith		
dd1	Daniel Daniels		
DLO-01	David Lockerby		

Buttons for 'Select', 'Cancel', and 'New' are visible to the right of the table. The bottom window, titled 'Employee Detail', is a form for entering employee information. The fields are as follows:

- First Name:** John
- Last Name:** Smith
- Address 1:** (empty)
- Address 2:** (empty)
- City:** (empty)
- State:** (empty) **Zip:** (empty)
- Home Phone:** (empty)
- Mobile Phone:** (empty)
- E-mail:** john.smith@company.com
- Emp. No.:** JS0012
- Pay Class:** (dropdown menu)
- Access Information:**  Enable Login
- Login Name:** (empty)
- Password:** (empty)
- Access Level:** (dropdown menu)

Buttons for 'OK', 'Cancel', 'Previous', 'Next', and 'Access Levels' are located on the right side of the form.

- Then click Select to assign this employee as Project Manager or Foreman
- Repeat for additional Foreman who will be doing percenting

08 - Adding a Project Manager and/or Foreman to Employee List

[09 - Setting DPC Options on Cover Sheet](#)

## 09 - Setting DPC Options on Cover Sheet

While the Cover Sheet is still open and BEFORE you send this bid to the field, you must set three options. These settings are based on the Databases settings found in Tools>Options>New Bid settings of the current database - for an explanation on setting up your database for use with DPC, please see the [DPC - Intial Setup Quick Start Guide](#) .

- Hours/Day
- Start Week on
- Ignore Bid Areas on Timecard Entries

The screenshot shows the 'Cover Sheet' application window. At the top, there are fields for 'Job Status' (In Progress), 'Bid No.' (11), 'Project Name' (DPC - Send - Receive - BUDGET), and 'Job No.'. Below these are 'Estimator' and 'Notes' fields. The 'Price Using' dropdown is set to 'Quick Bid (interactive)' and the 'Database' path is 'C:\VCS Documents\Quick Bid\DPC TEST QB 2.mdb'. The 'Typicals' dropdown is set to 'Use Typical Groups'. The 'DPC' tab is selected, showing a 'DPC GUID' field with the value 'A63CFE68-9E21-4A97-B461-8EA1D0A9C4'. Below this are dropdown menus for 'Project Manager' (Project Manager Daniel) and 'Foreman' (Foreman Daniel). A green highlighted area contains three options: 'Hours/Day' (8), 'Start week on' (Sunday), and 'Ignore Bid Areas on Timecard entries' (checked). Two callout boxes provide instructions: one for assigning the Project Manager and Foreman, and another stating that the green options cannot be changed after the bid is sent to the field.

 **Once this bid is sent to the field, these 3 entries in GREEN cannot be changed, even if the bid is unlocked.**

Your project is ready to be sent to the Foremen (or the Project Manager can start percenting/timekeeping).

Please review the [DPC - Project Manager Quick Start Guide](#) for instructions on sending your job to the field.

