## Instructions to Activate Estimate & Production History

By Arthur Nix, HeavyBid Trainer 10/18/19 Note: this is only for Advanced/Comprehensive Versions

Step 1 - you will need your HCSS Credentials Login. If you are new to HCSS this will be in an email however this is easy to retrieve as long as your email is in the HCSS system.

Go to your web browser and type in "hcssapps.com". You will get the screen below. If you don't know your username (which is usually your email) then click on the "Forgot Password" as shown below and fill in your email and see if you receive an email to reset your password.



If you do not receive an email then most likely you are not setup in credentials. Call HCSS Support at 1-800-444-3196 and ask them who is setup in HCSS Credentials as an administrator for your company. Then have that person repeat the steps above if they don't know their password. [You can have more than one Admin setup in HeavyBid. Preferably the Admin is not the IT person but someone in the estimating department]

Step 2 - Once you are logged in everyone on the estimating team should be setup in the User List. The reason is this will allow each estimator to gain access to the HCSS Academy where they can watch instructional videos. Click on HCSS Credentials "Open". Go to "User List" and enter everyone that going to use HeavyBid. For "User ID" put the person's email address. They will receive a notice via email of the credentials setup.



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Step 3 - Proceed down the dialog box in HCSS Credentials to "Product Setup"



Now open the above and click on "HeavyBid Licenses"

| ≡ HCSS C                      | Credentials  |
|-------------------------------|--|
| Users     Subscription Groups | HeavyBid Product Family  |
| III Reports                   | <ul> <li>HeavyBid Registrations</li> </ul>   |
| Company Settings              | HeavyBid Lite Standalone   |
| Product Setup                 | HeavyBid Comprehensive Standalone  |
| HeavyBid                      |  |
| HeavyBid License              | Preferences  |
| <ul> <li>HeavyJob</li> </ul>  | ×  |
| eLogs                         | <ul> <li>Allow access to HeavyJob data for Production History in HeavyBid. (Advanced or Comprehensive only)</li> </ul> |
| Service Agreements            | <ul> <li>Allow HeavyBid to Integrate with Safety data.</li> </ul>  |
| -                             | Note: You must own Safety to activate HeavyBid Safety integration.   |
| ×                             |  |
|                               | ✓ Save   |

Activate in Preferences the HCSS products you have. If you only have HeavyBid then the third check box will be the only one checked. Click on "Save"

Step 4 - If you want to activate Insights today then you have to make HeavyBid update your license (otherwise it will ping in overnight and apply the changes). See below. Go to Tools>Miscellaneous Tools> Update HeavyBid License



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Step 4 - You will be asked to restart HeavyBid. Get out of HeavyBid and restart.

Step 5 - You can now activate Estimate History and Production History (HeavyJob) in HeavyBid. Go to Tools> Preferences>System>Web Applications. Sign in as one of the Administrators in Credentials (which might be you)

| Preferences |  |   |  |  |
|-------------|--|---|--|--|
|             | Credentials Setup<br>A username and pa<br>Credentials are entr<br>In Enterprise system<br>Credentials Login: | ssword are required for automa<br>red in User Preferences, they v<br>is, this Login is shared for all us<br>Username (optional) | tic logon to Estimate History and HCSSApps. If User<br>will be used instead of the System Credentials entered here<br>ers within a division.<br>Password (optional)<br>measure |  |

Step 6 - Proceed to Production History below. This assumes you have HeavyJob.

| Estimate Braferences  |   |
|---|---|
|   | These settings affect the entire HeavyBid Estimating System and should be changed with caution.  Production History is used to compare recent real-world production data from HeavyJob to activities in the estimate in order to obtain more realistic production rates. For more information about using Production History <u>click here.</u> Production History is enabled in Credentials How to Disable Enable Production History in HeavyBid |
| <ul> <li>Company Message</li> <li>Report Headers</li> <li>Web Applications</li> <li>System Credentials Setup</li> <li>Production History</li> <li>Estimate Archive/History</li> <li>Safety Integration</li> </ul> | Set in open Production History for: Me All Users  |
|   | o <u>K</u>  |

Step 7 - Repeat the above setup but with the "Estimate Archive/History. This time check "All Users" so the default binoculars icon in Tree View will open up to Production History (or if you have HeavyJob default click on "All Users" above.

| I Preferences   | x  |
|---|--|
| <ul> <li>✓ Estimate Preferences</li> <li>✓ User Preferences</li> <li>System Preferences</li> <li>Bid Summary/Pricing</li> <li>Estimate Review</li> <li>Quote System</li> <li>DirectLink</li> <li>Server Options</li> <li>Automated Backup</li> <li>Company Message</li> <li>Report Headers</li> <li>Web Applications</li> <li>System Credentials Setup</li> <li>Production History</li> <li>Estimate Archive/History</li> <li>Safety Integration</li> </ul> | These settings affect the entire HeavyBid Estimating System and should be changed with caution.  Production History is used to compare recent real-world production data from HeavyUob to activities in the estimate in order to obtain more realistic production rates. For more information about using Production History click here.  Production History is enabled in Credentials How to Disable  C Enable Production History in HeavyBid Set to open Production History for: Me All Users Undate Historical Activity Codes |
|   | <u>ok</u>  |

And you are done with all the setup!



## **ARTHUR NIX**

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