

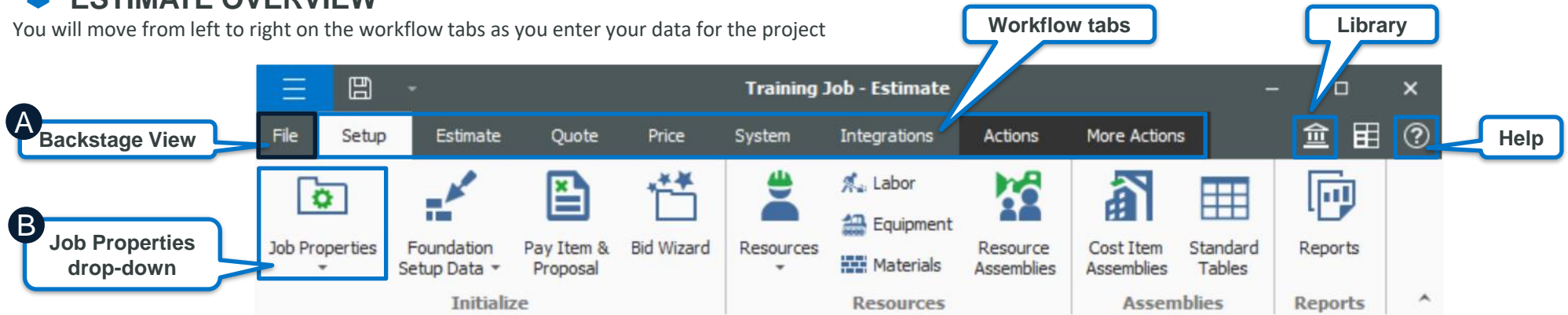
QUICK GUIDE

GETTING STARTED: ON PREMISE



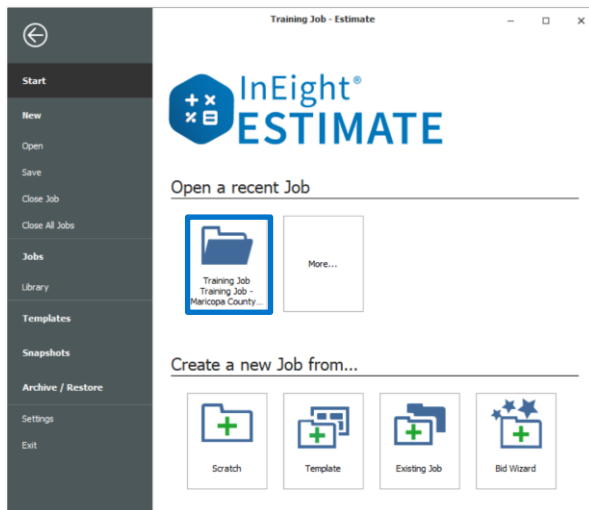
ESTIMATE OVERVIEW

You will move from left to right on the workflow tabs as you enter your data for the project



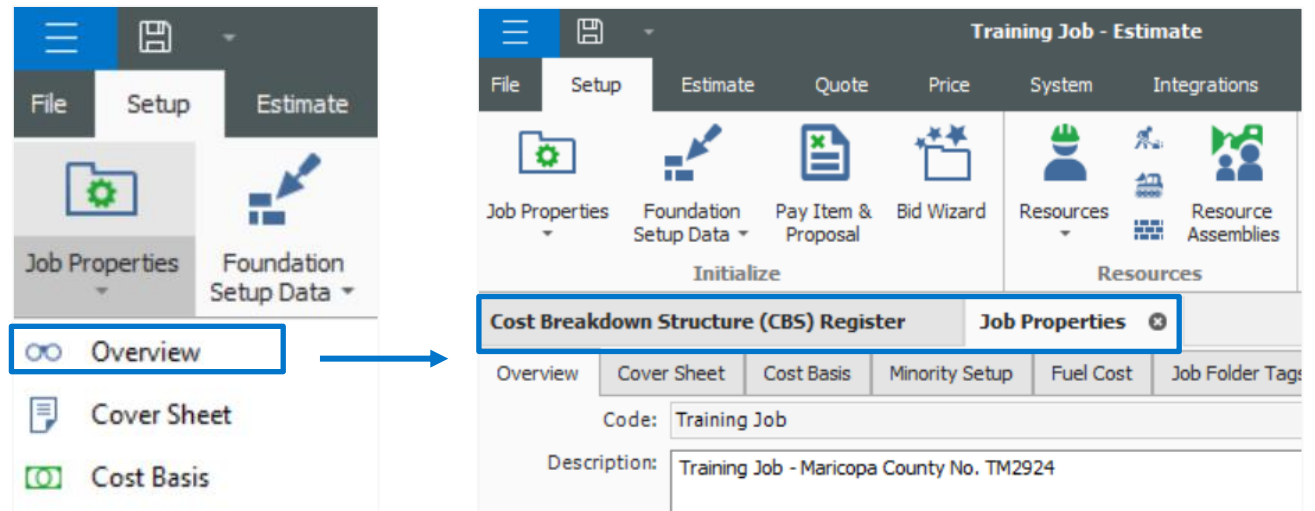
A OPEN A JOB FOLDER

1. From the Backstage view, under the **Open a recent Job** section, double click on your **job**.



B OPEN FORMS

1. Select **Overview** to open the Job Properties form.
2. Each form opens in its own tab within the active job folder.

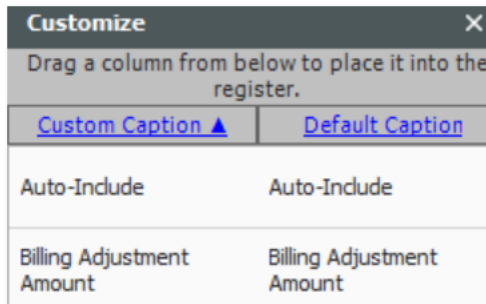


MOVE A COLUMN

1. To move the column, click on the **column header** and drag and drop it.



HIDE A COLUMN

1. To hide the column, click on the **column header** and drag it down until a black X appears, then let go.
2. To unhide a column, right click on any column header and select **Column Chooser**.




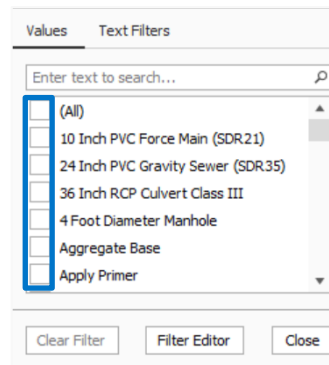
3. Find the **column** you want to unhide and drag-and-drop it to the location where you want it to go.

SORT A COLUMN

1. Click on the **column header** to sort the column in ascending order . Click a second time to sort in descending order .

FILTER A COLUMN

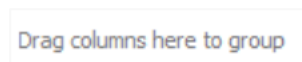
1. Hover over the **column header** for the **filter icon** to appear, then click the  icon.
2. Make your selection, then click **OK**.



3. To add expand the filter using And/Or functionality, click **Edit Filter**, in the lower right corner.
4. To clear the filter, click on **Clear Filter** ► **Close**.

GROUP COLUMNS

1. Click on the **column header** and drag it into the grouping area.



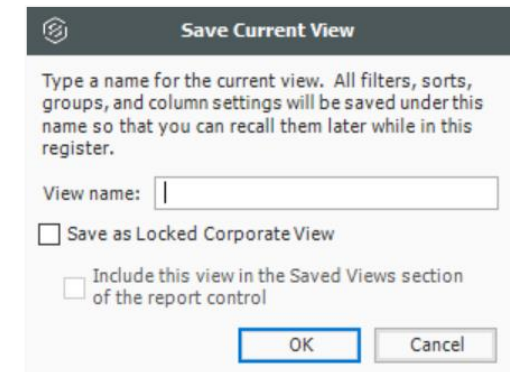
2. Continue to drag additional columns into the group.
3. To ungroup, right click in the grouping area and select **Clear Grouping**.

CREATE A SAVED VIEW


1. Click the **Saved Views** drop-down menu ► then click the **save icon**.

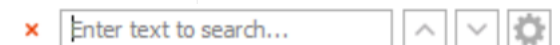


2. Enter the **View Name**, then select **OK**.



FIND FEATURE

1. Click the  icon.



2. Click on the  icon for more options.

