



## Boot Camp for Sage Estimating FAQ

### Who should attend one of the Boot Camp offerings?

While the Sage Estimating application is a powerful tool with tremendous functionality, getting started with a new software suite can feel overwhelming at first. This class provides an orientation on basic software workflow as it pertains to the estimating process. Whether you are a new user of Sage Estimating or simply have not used it in a while, the Boot Camp class provides you with a fundamental understanding to start navigating the system and begin tailoring it to the needs of your organization.

### How is the class structured?

The class is taught online and spans two days, typically on a Wednesday/Thursday of the 3rd week of each month. The lecture portions of the class are conducted remotely using a GoToMeeting session, during which you will listen and watch the instructor navigate the software and present the audience with workflow instruction mirroring the same activities they will do on their own. After each lecture portion, students perform specific workflow activities within the Sage Estimating software on a remote workstation dedicated to each paid registration for the 2-day session.

### What topics do the classes cover?

While various construction firms may specialize in different trades and consequently have industry-specific needs and/or data requirements, there is no feasible way for us to focus on all building disciplines simultaneously in the same class.

For consistency, all attendees will build a similar project using the same cost database, containing item content found in the BNi General Construction Costbook. We developed a generic warehouse cost estimate exercise geared towards a general contractor, for people to get familiar with the process of using the software. Upon completion of the class, students can apply the “how it works” knowledge they learned to the “what they need” content thereafter.

Our goal in the Boot Camp class is to show the process of using Sage Estimating tool to put an estimate together, regardless of the specific content coming out of the database.

### Are the classes one-on-one instruction?

While the lecture portion of the class is taught by a live instructor as you watch different aspects of software workflow demonstrated in real time, this is not one-on-one training. Rather, it is a group session, usually with people from multiple different construction firms, to get attendees familiar with the process of creating a project within the Sage Estimating application, from start to finish, following the detailed topic agenda sent to you prior to the class.

## What are the benefits of the Boot Camp class over personalized training/consulting?

While the class is not one-on-one instruction, it is a cost-effective way to learn basic Sage Estimating workflow to develop a cost estimate, using a prescribed set of training materials on a sample project. Taking this class prior to any formal implementation of Sage Estimating will give you the necessary background to understand how it works using existing data to better prepare you for best practices in adding your own.

It is in no way a replacement for a full Implementation which is always recommended by Accordant upon purchase of the software. While some Sage Estimating clients feel they can avoid investing in the cost of a full implementation by taking the Boot Camp and figuring the rest out on their own, most come to realize that taking the class is simply the most logical first step to understand what the software can do before customizing the application around their own business needs.

## Will I be working with my own estimates/database(s) during the class?

For consistency, all students will work on their own project using a set of workflow exercises provided prior to the class, using their own training copy of the BNi General Construction Costbook for Sage provided on the virtual classroom workstations.

## What are the requirements for attending the class?

You will need (a) a reliable internet connection to attend the class and (b) a local application client called the Swizznet Cloud Workspace installed. Instructions on downloading and installing the latter will be provided prior to the class, and depending on your company's IT policies, you may need assistance from your network administrator to complete this installation on the workstation you will be using to connect to the remote training environment when performing the class exercises.

This Swizznet Cloud Workspace client allows each student to virtually connect to the assigned remote training workstation. To ensure a smooth start of each class session, confirmation of (a) your ability to install this Swizznet Cloud Workspace client and (b) connect to the assigned training workstation are mandatory before received the training materials prior to the class.

While you need Sage Estimating application installed and configured to properly use it within your organization, students do not need it installed to take the class. Rather, registered attendees will be using a remote training workstation assigned to them prior to the class, with all of the necessary software and data loaded and pre-configured.

## What is included in the class registration?

Each paid class registration entitles you to the following:

- Activity materials to be following when performing the assigned exercises
- One (1) dedicated training computer, used during the class while working on the above
- Recordings of all class lecture sessions (provided upon completion of the class)
- Class certificate of completion for each registered attendee

## How long is the class and what time does it start each day?

We require that each attendee block out and confirm availability from 9 am to 5 pm EST for both days of the class. During each day, there are two major lecture portions (approx. 9 - 11 am and 1 - 3 pm EST), during which students will be connected a web meeting and listen to the instructor using the provided remote connection information. There are also two time intervals (approx. 11 am - 1 pm and 3 - 5 pm EST) during which students will complete workflow activities using the virtual classroom computer assigned to them prior to the class.

## Can more than person attend the training class?

While you can have multiple people listen to the call from your company, a single registration entitles you to a single classroom workstation, so you will need to share the computer if you want different people to practice the exercises.

## Can someone else attend the class if I am unable to do so?

We understand that urgent situations can arise in a construction company that may require you to tend to other matters the day of the class. You may have someone attend the class other than the original name(s) provided upon enrollment at no additional charge. However, it is the responsibility of the person that completed the class registration to ensure that all related email correspondence (training computer connection instructions, activity handout materials, etc.) is forwarded to the individual(s) that will actually attend before the class starts, including this FAQ sheet.