



On behalf of our entire team, welcome to ProEst! We are pleased that you are now a valued ProEst client, and want you to know that we are committed to optimizing your company's estimating process and delivering the fastest return on your ProEst investment.

After 35 years of experience, we've learned firsthand what works, what doesn't and what's required to obtain the very best results with ProEst. And while we understand that every implementation is unique, we have prepared this ProEst Implementation Guide as a best practices roadmap we think you will find helpful.

Discovery Call:

This brief call will introduce you to your dedicated Account Manager, a knowledgeable ProEst professional who will be your primary contact during the implementation of your ProEst software, and throughout your ProEst client relationship. If data conversion is required, this call will help us establish a workable schedule for material deliverables.

Kickoff Meeting:

A key step in your ProEst implementation is the initial Kickoff Meeting. This meeting is designed to identify potential issues, eliminate surprises and ensure implementation success. Together, we will establish expectations, identify aspects of your company's implementation that may require special considerations, address any questions you may have, and schedule important dates.

Who Should Attend

The capabilities within ProEst extend the value of your data well beyond estimating. While estimators are often considered to be the primary ProEst users, the valuable information generated by the software can also be utilized by your company's upper management, project managers and accounting staff to improve decision making, job costing and the purchasing process. To ensure that the ProEst software setup and reporting configurations meet the needs of every stakeholder, your Kickoff Meeting attendees should include:

- Your chief estimator and other estimating staff
- A member of your IT staff for installation planning
- A member of your accounting staff
- Anyone else that needs to access or utilize your ProEst data

What We Will Cover

- Identify who will be involved in your implementation, including the project lead for your company and your primary ProEst implementation contact
- Discuss data migration and develop a plan for importing your estimating data from another estimating system or Microsoft Excel into ProEst
- Identify and plan for any other data migration needs your company has, such as importing vendor, client and subcontractor lists into ProEst
- Talk about your accounting system and the technical requirements for integrating that system with ProEst if needed
- Schedule a date and time for our technical support team to install your ProEst software
- Establish your ProEst "Go-Live" date and create a timeline for the remaining steps of your company's implementation

Data Conversion:

Importing data from your existing systems is a crucial step in your ProEst implementation. We have found that the adoption of software by end users is higher– and faster– if familiar existing data can be seen in the new system from the earliest possible stages, and recommend that data migration be considered a priority. Key steps in data migration include:

- Setup of data folder structure for organization
- Import data from Microsoft Excel or standard text files
- Import data from Existing Estimating Systems
- Import material items, client lists, vendors and other standard information
- Setup for integration with Accounting software
- Setup for integration with Project Management and Scheduling software

ProEst®

Installation

Prior to your ProEst installation, our technical support team is available to review specifications about your company's server, workstations, and laptop computers.

- Determine if our support department needs to assist your staff with the installation
- Setup an installation date and time if necessary

System Notes:

- Installs SQL Express 2008 automatically
- Compatible with Microsoft SQL Server 2005, 2008, 2012 Express and Desktop Editions
- Microsoft Windows Server® 2003, 2008

Software Downloads:

The Installation files and support documents are available at the following link:<http://www.proest.com/Installation>

Once ProEst is installed and your database is configured, we will work with your team to complete the data migration elements identified during the Kickoff Meeting, integrate ProEst with your accounting system, refine and customize your ProEst reports and complete any other implementation deliverables that have been established.

Training

ProEst is backed by a team of highly-trained professionals with the construction and software experience needed to deliver top-rated training services designed to maximize your software investment. To provide a realistic learning environment, training is performed using your own company's data. Once your ProEst installation is complete, our training staff will contact you to schedule your first class and determine who will attend. ProEst training should be completed before your company's "Go-Live" date.

Training Options Our training options include:

- **Web-Based Training** The Web-based ProEst training course gives you access to quick, personal training without having to leave the office. The course is divided into five one-hour Web-based classes, with additional time available if necessary. After-class tutorials, which must be completed prior to the next class, promote progressive learning of key ProEst functions.
- **Classroom Training** Classroom training at our San Diego headquarters is designed to give you the personal attention needed to quickly become productive with your ProEst software. This training is presented in a hands-on classroom environment where each attendee has a computer to practice what is being taught. This program ensures a complete understanding of the functionality and use of ProEst.
- **On-Site Training** On-site training provides a customized ProEst training program designed to fit your business needs. The time schedule and curriculum is based on your computer and estimating knowledge. On-site training is completely customizable, and places our ProEst training staff at your disposal.

Completion Meeting

After your ProEst training is complete, we will contact you to schedule a Completion Meeting. Like the Kickoff Meeting, this is an important step in your company's implementation process and will help us improve our service delivery.

At the Completion Meeting, we will:

- Gather overall feedback about your implementation process, including installation, training, data migration, custom report writing and so forth
- Discuss and schedule additional or ongoing training needs
- Address any open issues your company has related to your estimating needs and your ProEst software implementation

If you have anything that needs to be addressed before the Post Implementation Meeting, our Technical Support team is here to help.

Go Live

After these six implementation steps have been completed, you are ready to use ProEst in your daily workflow. Should any questions or issues arise, we encourage you to contact your Account Manager right away. Again, welcome to ProEst!

