

# Installation and Setup Guide

## **BidScreen XL**

BidScreen XL is a Microsoft Excel add-in application and can only be used through Microsoft Excel. Microsoft Excel must be installed on your computer and BidScreen XL must be added to Excel. Once BidScreen XL is installed and added, a BidScreen XL ribbon tab will be available in your Microsoft Excel spreadsheet/workbook.

Note: The steps to add BidScreen XL to Microsoft Excel will vary slightly according to which version of MS Excel version you have.

**BIDSCREEN DOES NOT AUTOMATICALLY ADD INTO MS EXCEL. AFTER DOWNLOADING BIDSCREEN, TO COMPLETE THE INSTALLATION AND SETUP PROCESS, PLEASE FOLLOW THE INSTRUCTIONS BELOW.**

### **Step 1: Which Version Of Bidscreen Do I Download?**

There are two versions of Bidscreen XL available: 32bit and 64bit. Ensure that you download the correct version of Bidscreen. This will depend on whether you have a 32bit or 64bit version of Microsoft Excel. To check this, before downloading Bidscreen XL:

- (a) Open up Microsoft Excel
- (b) Click on **File** (upper left hand corner)
- (c) Click on **'Account'**
- (d) Click on **'About Excel'** button.
- (e) The displayed page will tell you if your MS Excel is 32bit or 64bit.

### **Step 2: Downloading Bidscreen XL**

- (a) Go to [www.takeoffsoftware.com](http://www.takeoffsoftware.com), select **FREE TRIAL**, fill in the Registration Form and download your FREE 32bit or 64bit version of Bidscreen XL depending on which version on MS Excel you have installed on your computer.
- (b) Once downloaded, to begin installation, find the Bidscreen XL\_Setup.exe. file in the Downloads folder on your computer.
- (c) Double-click on Bidscreen XL\_Setup.exe. file (make sure MS Excel is closed before starting the installation).
- (d) Follow wizard instructions.

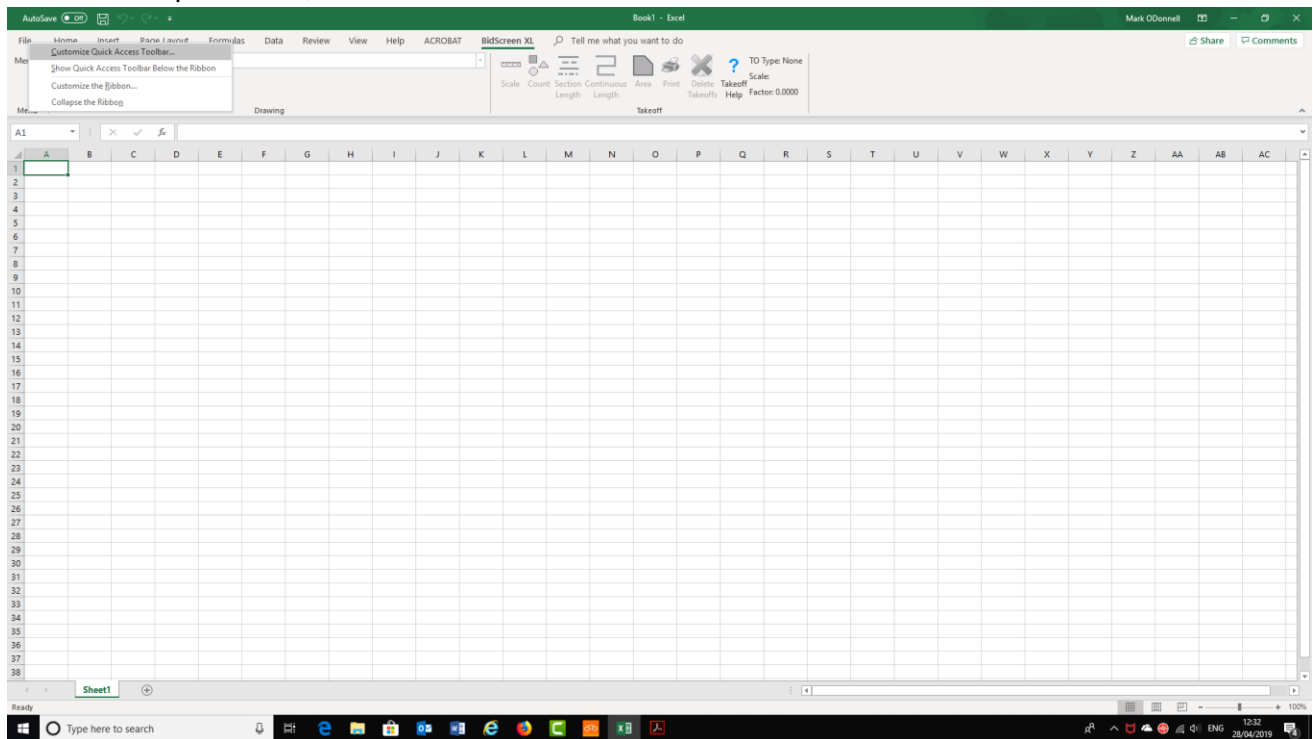
Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

## Step 3: Adding Bidscreen Into Your MS Excel

Bidscreen **DOES NOT** automatically add in to Microsoft Excel following your initial download. To add Bidscreen into MS Excel:

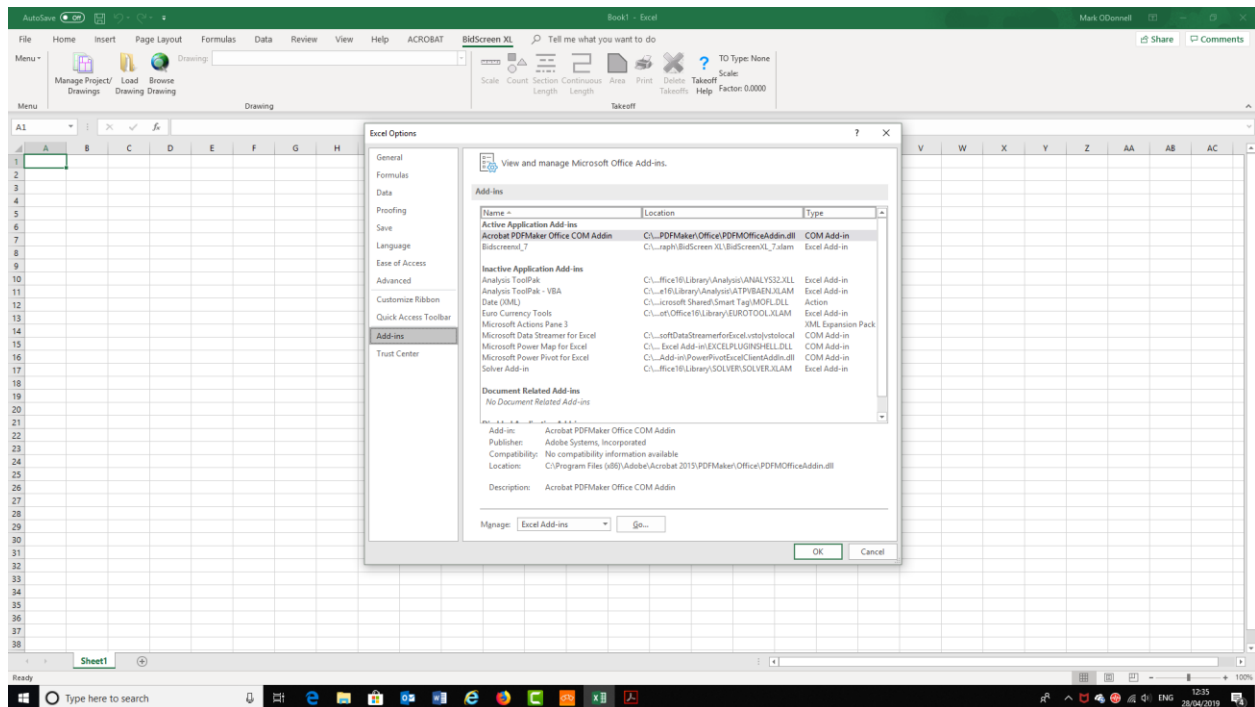
- (a) Open up a blank MS Excel spreadsheet.
- (b) Hover your cursor over 'File' tab (upper left-hand corner of spreadsheet) and right click on your mouse.
- (c) From the dropdown list, select 'Customize Quick Access Toolbar'



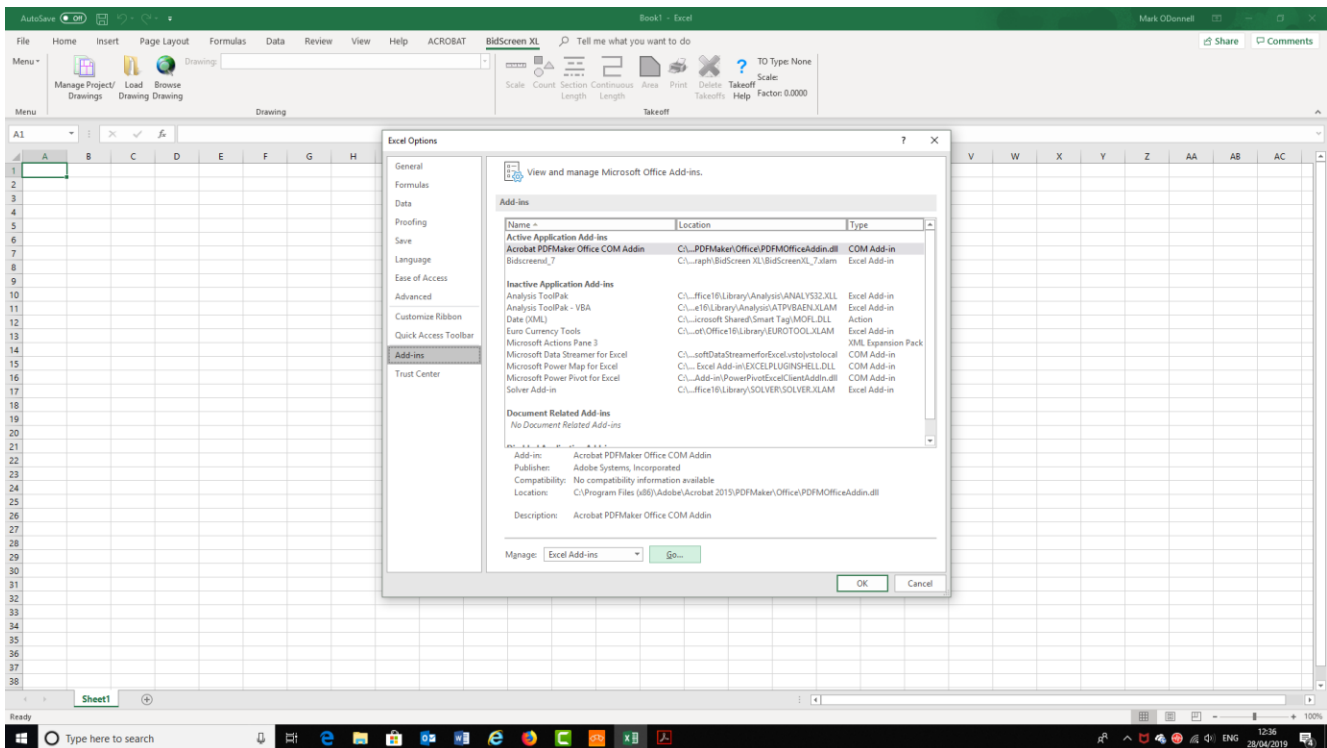
Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

(d) Select the **ADD-INS** option located in the list at the left-hand side of the screen.



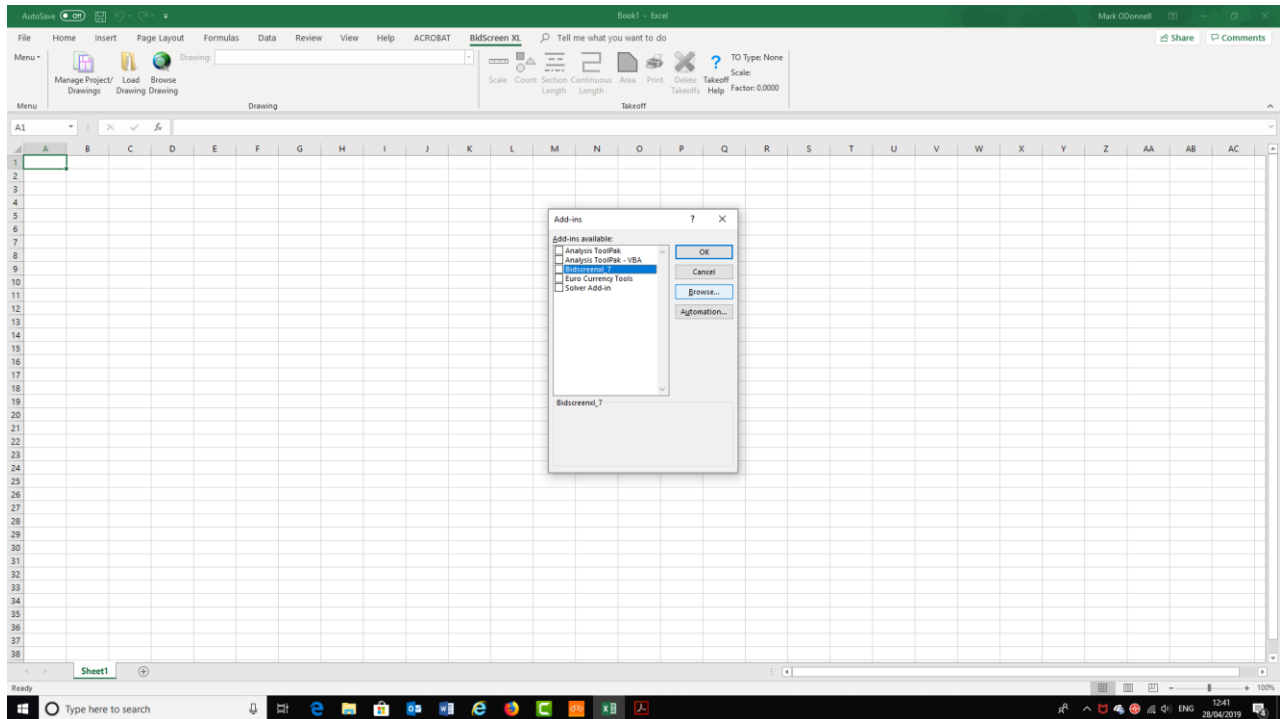
(e) At the Add-ins window click **GO** button located at the bottom, left of center of the screen.



Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

(f) If **Bidscreen XL\_7** does NOT appear in the Add-ins list, click the **BROWSE** button.



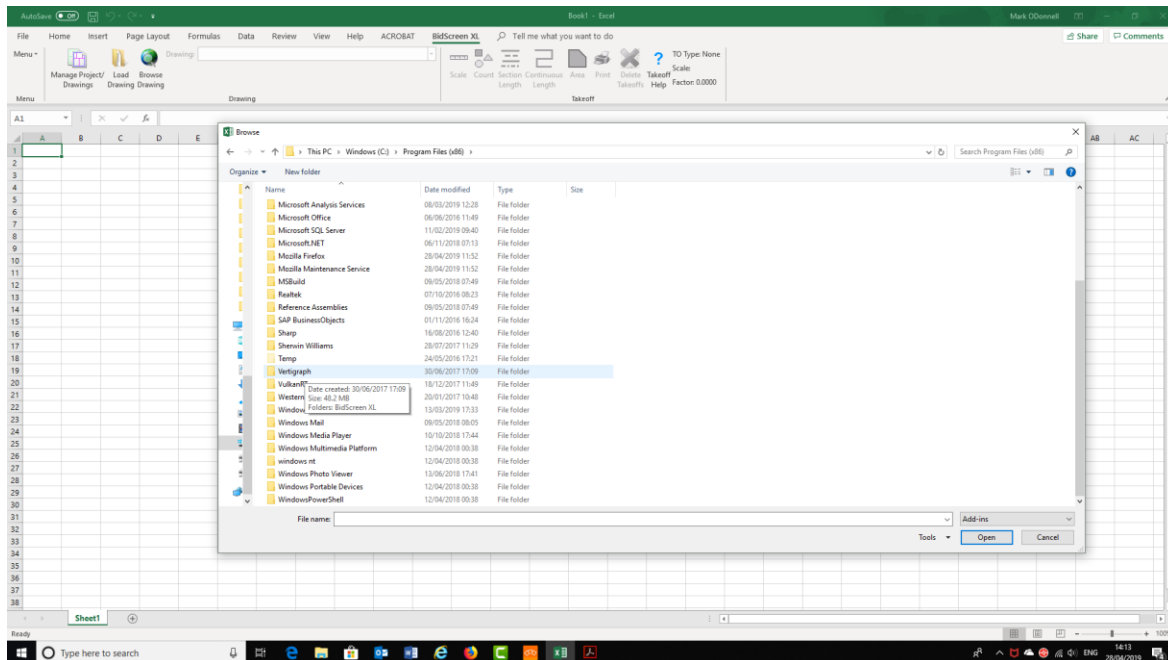
(g) You will now need to locate the **Bidscreen XL\_xlam** file that will be located in your computer **C: drive**

- 32bit version will be located in: **C:\Program Files (x86)**
- 64bit version will be located in: **C:\Program Files**

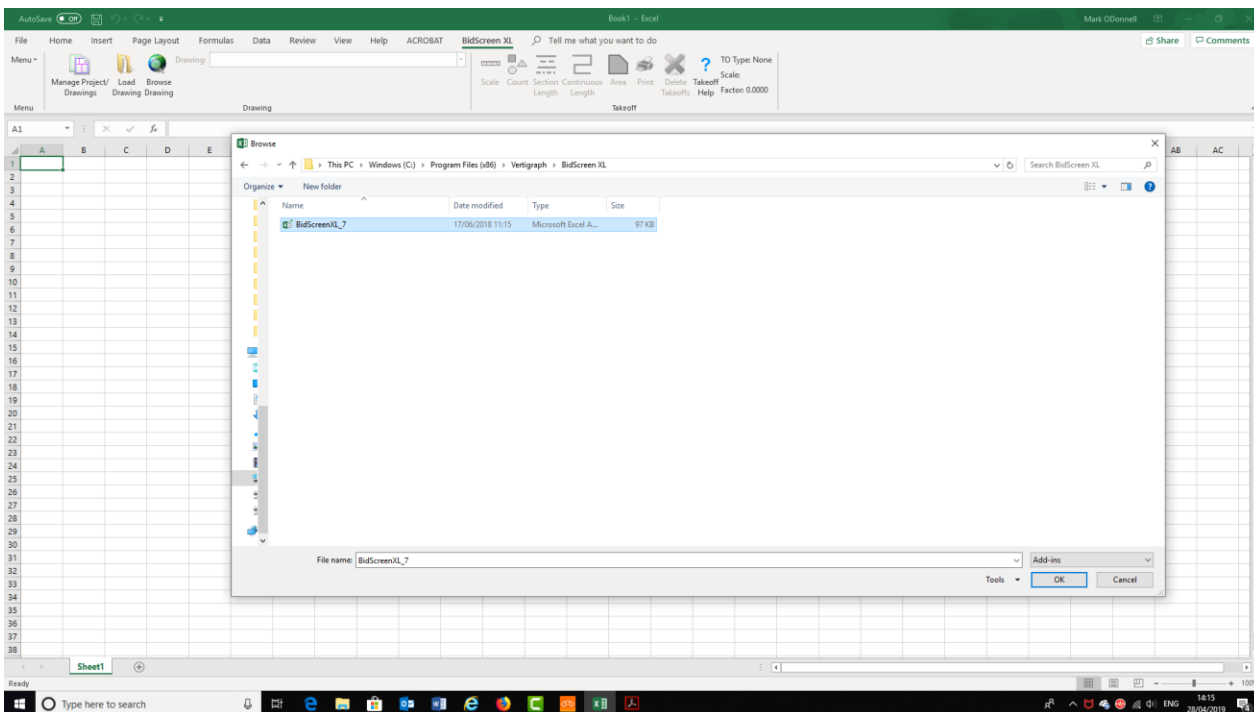
Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

(h) Locate the **Vertigraph** folder and double click to open. Next, double click on the **Bidscreen** folder.



(i) Single left hand click on the **Bidscreen XL\_xlam** file to select. Click on **OK** button.



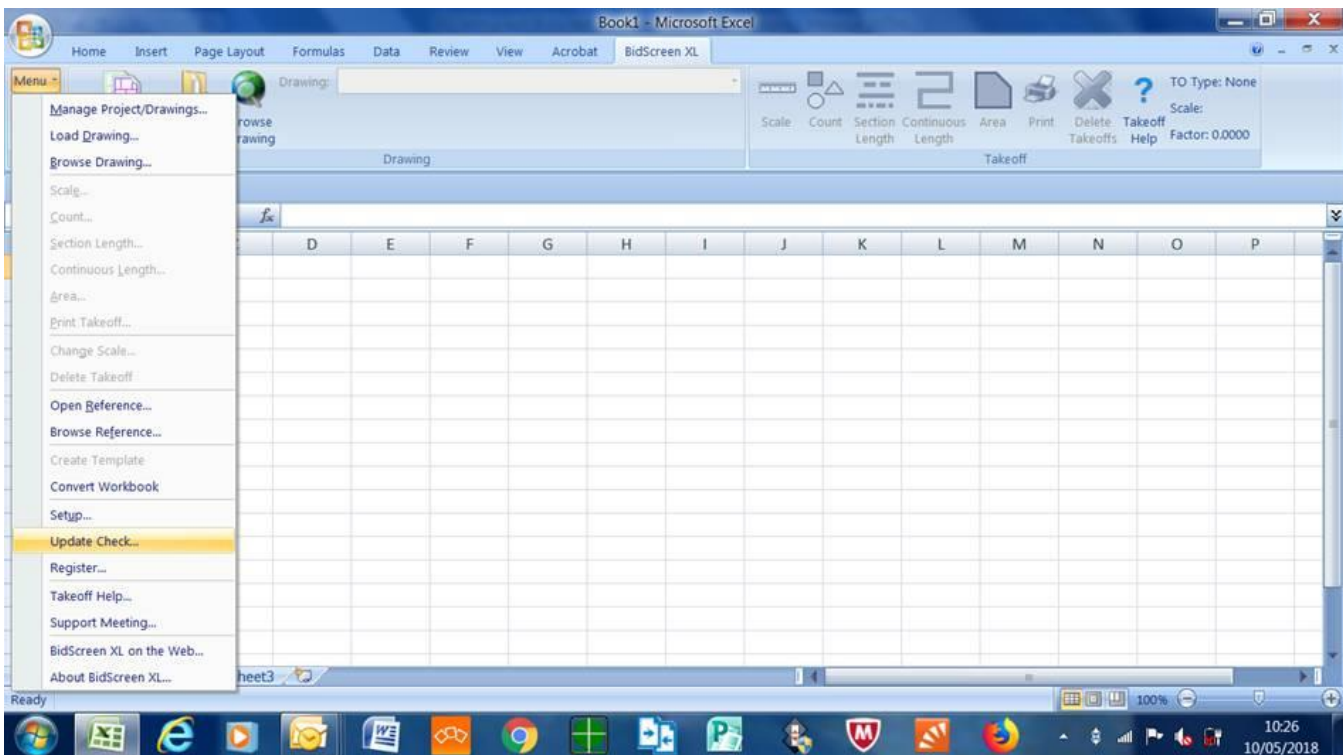
Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

- (j) To complete the process, on the Add-Ins page, Select **Bidscreen\_7** and Press **OK**.
- (k) A Registration dialogue will appear. When prompted to register, Click **NO** to register if you are evaluating the software.
- (l) Once successfully installed and added into Excel you will now have a BidScreen XL tab at the top of Excel. If the BidScreen XL tab is not present, please close and restart Excel.
- (m) Bidscreen XL is always accessed from any Excel spreadsheet.

## Step 4: Check for Software Updates

Go to the BidScreen XL tab and from the BidScreen **Menu** on the left select **Update Check**. If there are updates available, please download and install them as per the step by step instructions on the screen

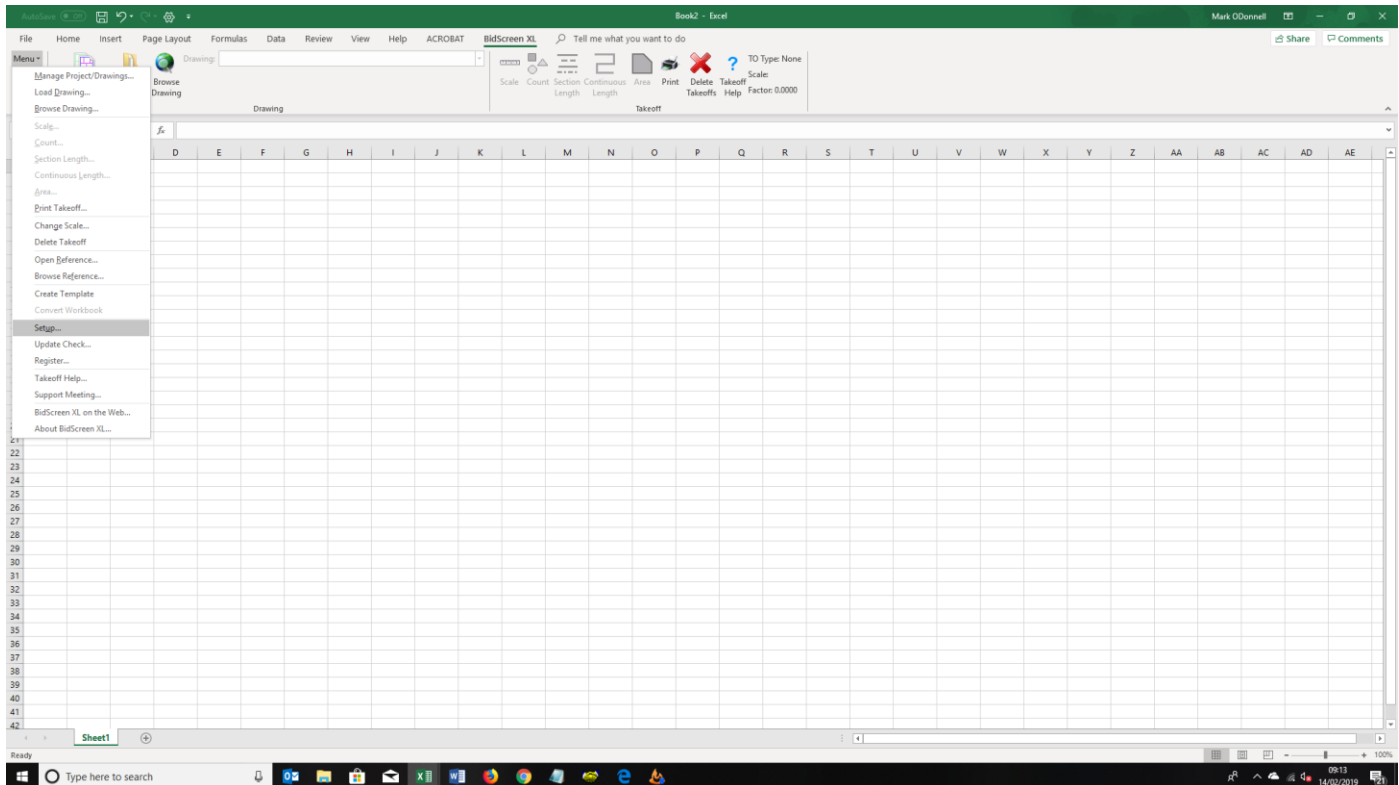


Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

## Step 5: Setup Bidscreen for the UK & Europe

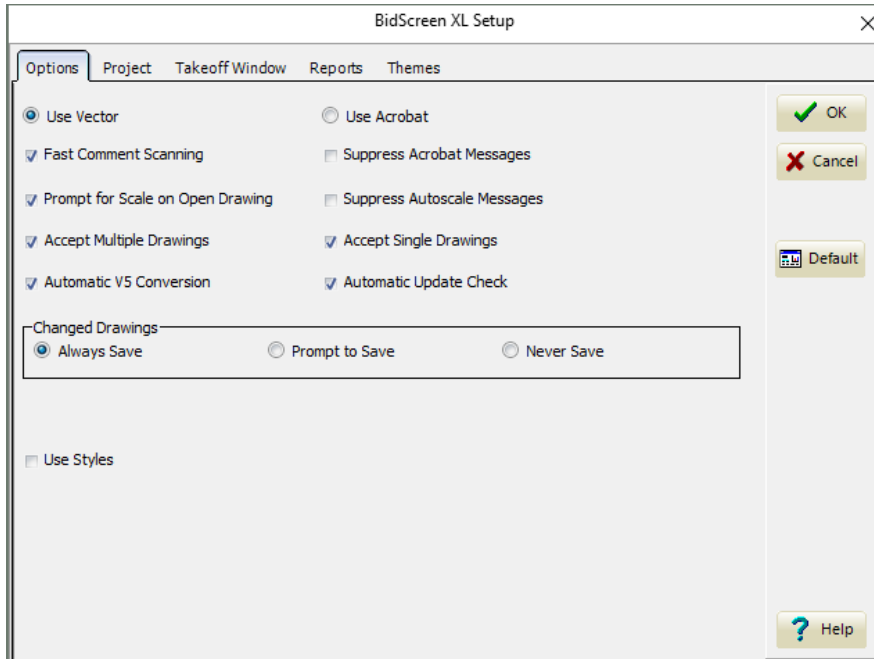
Go to the BidScreen XL tab and from the BidScreen **Menu** on the left select **Setup**. We recommend that you change the settings to the screenshots as shown below:



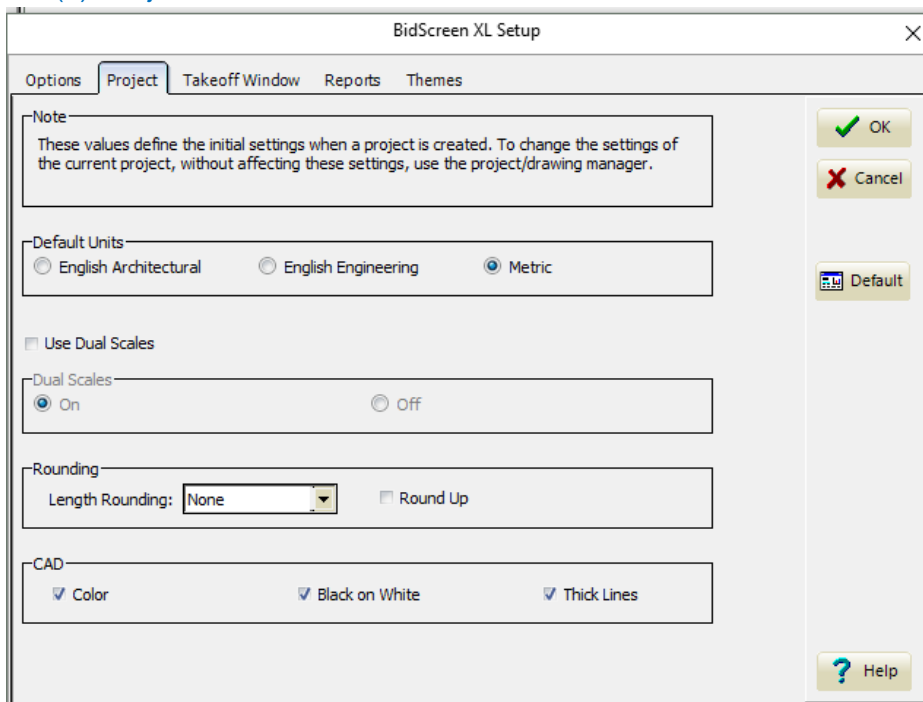
Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

(a) Options Tab:



(b) Project Tab:



Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764



# Installation and Setup Guide

## (c) Takeoff Window Tab:

The screenshot shows the 'BidScreen XL Setup' dialog box with the 'Takeoff Window' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'Options', 'Project', 'Takeoff Window', 'Reports', and 'Themes'. The 'Takeoff Window' tab contains several settings:

- ☒ Show Layer List
- ☐ Enable Auto Scroll
- Toolbars:**
  - ☒ Show Rounding Toolbar
  - ☒ Show Snap Toolbar
  - ☒ Show View Toolbar
- Cursor Style:**
  - ☐ Box Cross
  - ☐ Shadow Cross
  - ☒ Thin Cross
- Takeoff:**
  - ☒ Show Current Cell
  - ☐ Show All Cells
- Snap:**
  - Angle:
  - Grid:

At the bottom center is an 'Edit Shortcuts' button. On the right side, there are buttons for 'OK' (with a green checkmark), 'Cancel' (with a red X), 'Default' (with a document icon), and 'Help' (with a question mark icon).

## (d) Reports Tab:

The screenshot shows the 'BidScreen XL Setup' dialog box with the 'Reports' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'Options', 'Project', 'Takeoff Window', 'Reports', and 'Themes'. The 'Reports' tab contains several settings:

- Project Settings:**

These values define the initial settings when a project is created. To change the settings of the current project, without affecting these settings, use the project/drawing manager.

**Report Title Block:**

  - Line 1 Caption:
  - Line 2 Caption:
  - Line 3 Caption:

☐ Only Show Title Dialog for New Projects
- Program Settings:**

These settings are defined at the program level. They can not be modified on a project basis.

  - ☐ Print Style Legend on 2nd Page
  - ☐ Compress PDF Files
  - ☐ Suppress Scale Warnings

At the bottom right, there are buttons for 'OK' (with a green checkmark), 'Cancel' (with a red X), 'Default' (with a document icon), and 'Help' (with a question mark icon).

Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764

# Installation and Setup Guide

Finally, Click on the **OK** button so that your settings are permanently saved.

Bidscreen XL is now installed and setup, ready for use during your trial period. When you open MS Excel, you will be asked if you want to Register or not. During the trial period, click on the NO option and continue using Bidscreen.

Should you choose to purchase, Bidscreen XL can be purchased directly from our website.

For further assistance or technical support, please call us on 01782 835764.

We offer telephone and 'screenshare' support, Mon-Fri, 8am -5.30pm.



Should you need any further assistance downloading or adding Bidscreen into your MS Excel, please contact us on 01782 835764