



# Advantage BOM User Guide

Advantage BOM is a product of PROCAD software. It is designed for use with PROCAD SPOOLCAD's products.

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Advantage BOM

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# Before You Begin

## System Requirements

PROCAD Advantage BOM has the following minimum requirements:

### *System Requirements*

The system requirements for 32-bit or 64-bit computers:

- For Microsoft Windows 8 and Windows 7
- Intel Pentium 4 process or AMD Athlon, 2.4 GHz or greater or Intel or AMD Dual Core processor, 2 GHz or greater
- 100 MB free disk space for installation

PROCAD Advantage BOM 64-bit cannot be installed on a 32-bit Windows Operating System.

### *Additional Requirements for all systems*

- MS Visual C++ Redistributable (installs with the software)

## Media Contents

### **Purchased Software and Evaluation Modules**

PROCAD Advantage BOM installation media contains a full version of the software you purchase. You may install one or more of the evaluation modules as required.

### **Requesting Licenses**

The Advantage BOM does not come with a license. You will need to contact [support@procad.com](mailto:support@procad.com) to purchase a license for the software. You can visit PROCAD's website to view a demo on the Advantage BOM application.

# About Advantage BOM

The Advantage BOM application allows you to create and edit BOM from a PCF or IDF file.

Using the Advantage BOM you can open two types of files to gather the information from them. These are:

- PCF files
- IDF files

Use the PCF file to import the data so the Advantage BOM can create a material takeoff sheet. You can use multiple PCF files simultaneously.

- **Note:** PROCAD's 3DSMART and 3DSMART+ software will create PCF files.

Use the IDF file to import the data so the Advantage BOM can create a material takeoff sheet. You can use multiple IDF files simultaneously.

The PCF and IDF files include the size, description/type, material, weight/schedule, rating, manufacturer, destination, valve tag, and catalog number for each component you want to use in your material list.

- **Note:** IDF files will have the above category added in each component description.

## Software Updates and Technical Support

You can visit PROCAD's website to receive any updates to your software. You can only access this feature through the Web.

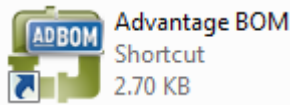
# Navigating Advantage BOM

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## Starting Advantage BOM

To start *Advantage BOM*, double-click on the *Advantage BOM* shortcut in the Advantage BOM folder on your desktop.


Advantage BOM



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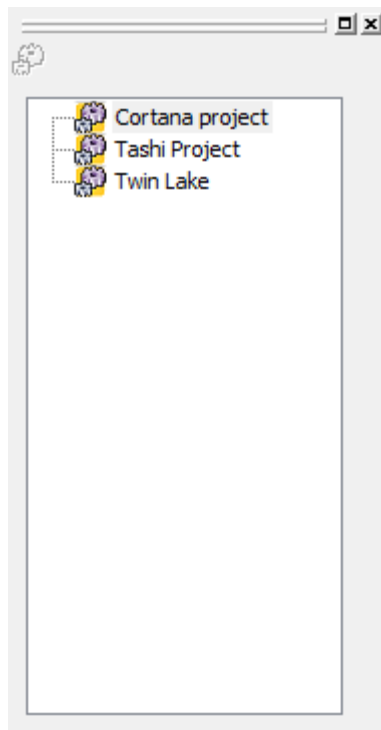
## Definitions

To effectively use the Advantage BOM, it is important to understand the concept of a Project.

**Project** – One project consists of one or more PCF or IDF. Each project may have the same general settings applied to all of its files through the application. Project appear as  in the tree diagram to the left side of the application.

**File Path** – This location defines the location of your PCF and IDF files.

This configuration can be seen in the example below.





# Procedures

## Fully Generate an Advantage BOM Project

To fully create a new spec, perform six steps. These are:

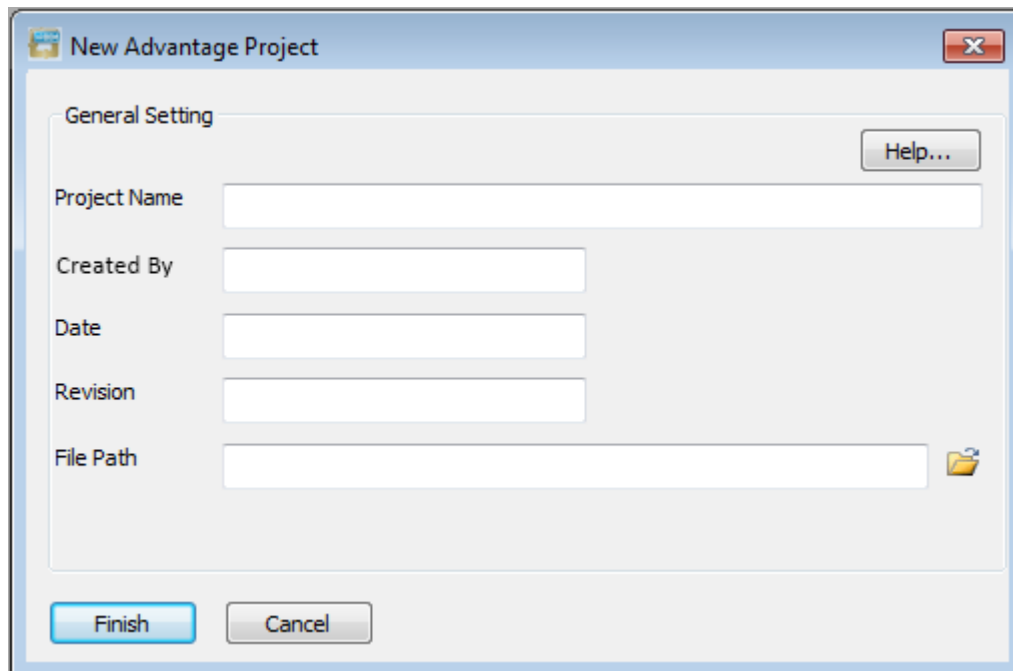
- Creating a New Project
- Opening the Project
- Entering the General Settings
- PCF Locations
- IDF Locations
- Generate BOM

To accept any changes made to a new or existing project, click the **Apply** button in the dialog box that you are currently working in.

## Creating a New Project

*To create a new project...*

In the “tree view”, right click on a blank space and click **New** from the popup menu or click the **Create New Project** button. The new project wizard will appear.



In the **Project Name** field, enter a **name** for your new project. You can enter the information in the **Created By**, **Date**, and **Revision** fields or edit it later in the General Settings. In the

**File Path** field, browse for the folder where your PCF and IDF are located. This field is mandatory to complete the new project wizard.

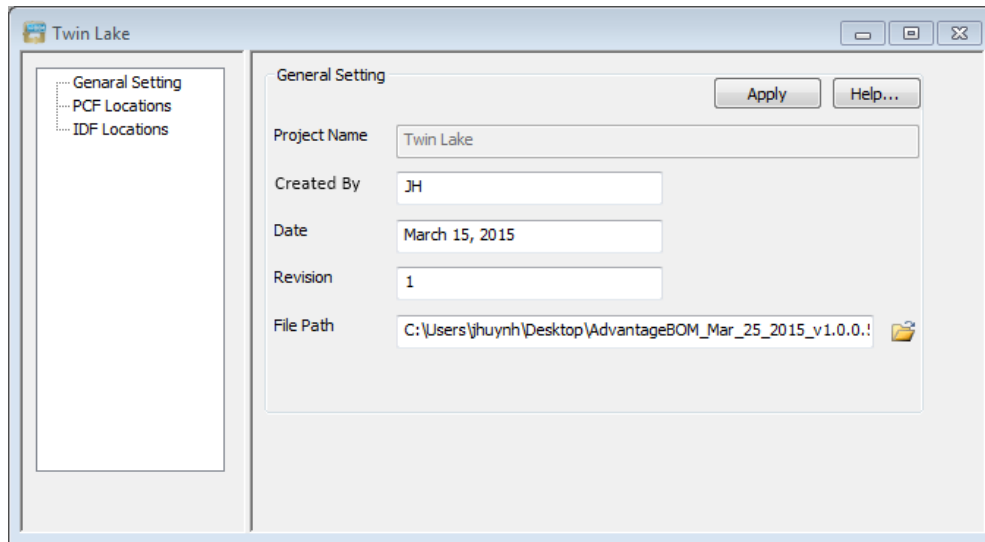
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## Opening the Project

*To open the Project...*

1. Complete the steps for **Creating a New Spec**.
2. Double click on the project name on the “tree view”

The following view will appear:



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## Entering the Settings

The first section is the project general settings. You can use this section to make any changes that was not made during the New Project Wizard.

**Note:** Changes to the project may be accepted at any time by clicking the **Apply** button.

In this field...	Enter/Do this...
Project Name	This is the project name
Created By	You can enter the name of the person that created this project
Date	Enter the date for this project
Revision	Enter the revision number for this project
File Path	This section is for you to enter the file path to the location of the PCF and IDF. This will populate the list in the PCF locations and IDF Locations.

When you complete all fields on **General Settings** and would like to convert PCF files click the **PCF Locations** tab.

This section will list all PCF files that you have specified in the first section. You can choose which PCF file to use and it will list the materials that are available on each PCF files.

In this field...	Do this...
PCF Files	Displays all the PCF files that are available from the specified File Path location in the General Settings. You will be able to select the PCF files you would like to use to convert to a BOM
Material	This will list the materials found inside the selected PCF files from the PCF files selection.
Select All	Clicking the select all button will select all PCF files from the list.
Generate BOM	Clicking on Generate BOM will take the selected PCF files and the materials and generate a BOM. The software will prompt you to save the BOM file after it is generated. The default format is CSV which can be opened in any spreadsheet program.

When you complete all fields on **General Settings** and would like to convert IDF files click the **IDF Locations** tab.

This section will list all IDF files that you have specified in the first section. You can choose which IDF file to use and it will list the material and description that are available in each IDF files.

In this field...	Do this...
IDF File	Displays all the IDF files that are available from the specified File Path location in the General Settings. You will be able to select the IDF files you would like to use to convert to a BOM
Component Description	This will list the materials found inside the selected IDF files from the IDF files selection.
Select All	Clicking the select all button will select all IDF files from the list.
Generate BOM	Clicking on Generate BOM will take the selected IDF files and the materials and generate a BOM. The software will prompt you to save the BOM file after it is generated. The default format is CSV which can be opened in any spreadsheet program.

## Editing the General Settings

You can edit the **General Settings** by opening the Advantage BOM and follow the steps below:

- 1) Open the Project you would like to edit.
- 2) In the General Settings Tab, you will see the list of datafields that you can edit.
- 3) You can make changes to the Created by, Date, Revision and File Path fields.
- 4) Click the **Apply** button to save the changes.

# Using Advantage BOM Utilities

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## Copying a Project

The **Copy** function copies the information from one project and saves them as a new project

### *To copy a project...*

1. In the tree view, highlight the project that you wish to copy.
2. Right click and select **Copy**.
3. A copy of the project will be created. You will need to rename that project (see renaming a project section).

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## Deleting a Project

Use the **Delete** utility to delete a project from the tree view.

**Note:** The **Delete** feature will not remove the PCF or IDF files from your computer. It will only remove the project from the Advantage BOM application.

### *To delete a project...*

1. In the tree view, highlight the project that you wish to delete.
2. Right click and select **Delete**.
3. A confirmation of deletion message will appear. You will need to click **Yes** to delete the project. You can click **No** to cancel the deletion.

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## Renaming a Project

The **Rename** utility renames a project in the tree view.

### *To rename a project...*

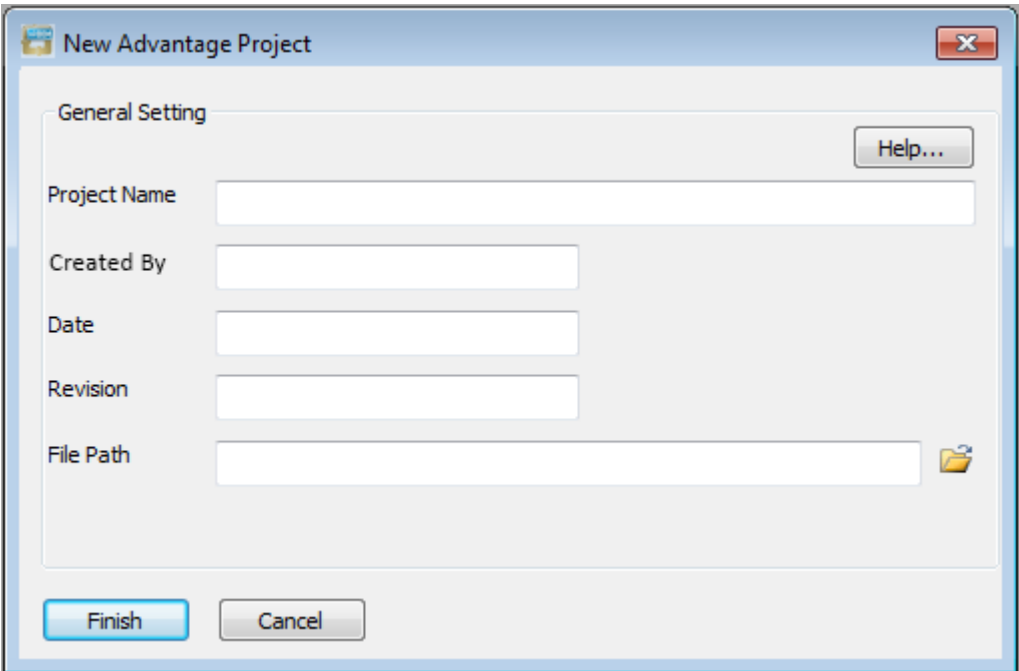
1. In the tree view, highlight the project that you wish to rename.
2. Right click and select **Rename**.
3. In the tree view, the selected project will prompt you to enter a new project name. Enter a new name for the project.
4. Click **Enter** to rename the selected project.

# Dialog Boxes

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## New Project Dialog Box

Use this dialog box to create a new Advantage BOM project.



In this field...	Do this...
Project Name	This section you can enter the Project Name for this Advantage BOM project
Created By	Enter the name of the person that created this project
Date	Enter the date this project was created
Revision	Enter the revision number for this project
File Path	Use the folder icon to locate a folder location of where your IDF or PCF files are found
Help	This button brings up the Help document
Finish	Click Finish to complete the new project
Cancel	Click Cancel