

QUICK GUIDE

COST ITEM SETUP



◆ CBS OVERVIEW

Superior
Cost item with child item(s) below it.

Subordinate
Child item that has a related parent (superior).

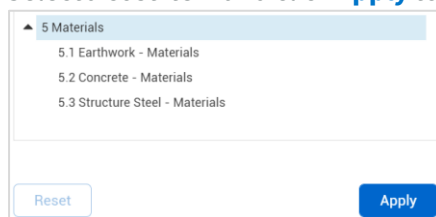
WBS phase code
For sharing data with other software.

Tasks				Task details		
	CBS position	Description	WBS phase code	Resources	Forecast (T/O) qty	UoM
☐	1	Job Overhead	1002		1.00	Lump Sum
☐	2	Earthwork	1069	5	10,000.00	CY
☐	3	Concrete	1071	5	10,000.00	CY
☐	4	Structural Steel	1073		1,000.00	Ton
☐	4.1	Erect Steel - Heavy	1074	5	800.00	Ton
☐	4.2	Erect Steel - Light	1005	5	200.00	Ton
☐	4.3	Bolted Connections	1006	5	2,000.00	Ea

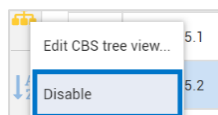
Terminal
Cost items with no subordinates. Where costs and hours are tracked.

◆ CBS TREE

1. Click on the icon.
2. Click on ▼ or ▲ to navigate the CBS.
3. Select a cost item and click **Apply** to filter to a cost item and its subordinates.

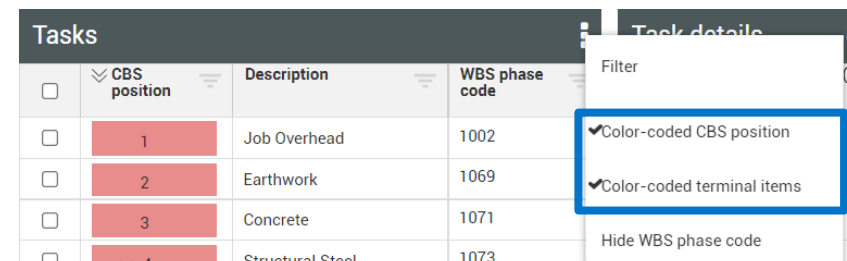


4. To clear the filter, click then select **Disable**.



◆ TURN ON/OFF CBS COLOR-CODING

1. Select the **Context menu** of the Tasks data block.
2. Click on color-coding setting(s) to turn either on or off.



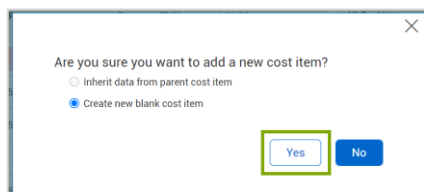
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CREATE A NEW COST ITEM

1. On the CBS tab, select the .
2. Select **Create a new blank cost item**, then click **Yes**.



3. Complete information on the Details tab of the slide out panel.
4. Click **X** to close the slide out panel.

MOVE A COST ITEM

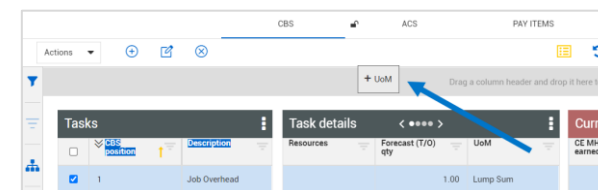
1. From the CBS tab, right-click on a subordinate cost item.
2. Select **Adjust CBS position**.
3. Click and drag the cost item into a new position.



4. Click **Save**.

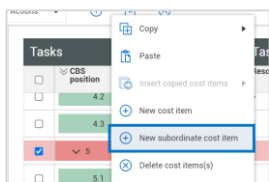
GROUP COST ITEMS

1. From the CBS tab, click on **Group columns**.
   
2. Drag 1+ column headers into the grey bar area.

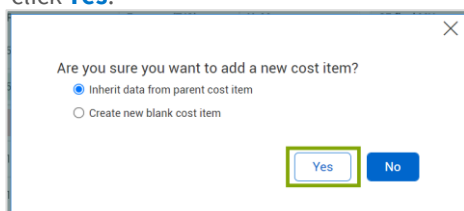


CREATE A SUBORDINATE COST ITEM

1. On the CBS tab, scroll down and find a **superior cost item**, and right-click on it.
2. Select **New subordinate cost item**.

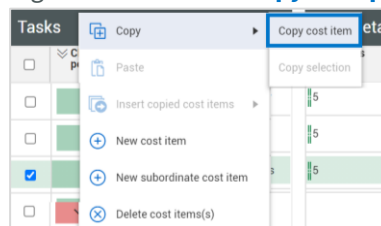


3. Select **Inherit data from parent cost item**, then click **Yes**.

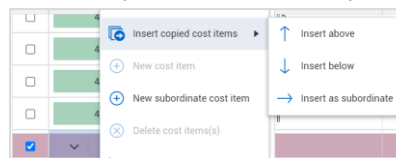


COPY A COST ITEM

1. From the CBS tab, select 1+ cost items.
2. Right-click and select **Copy** ► **Copy cost item**.



3. Right-click on another cost item and select **Insert copied cost items**.
4. Select the preferred insertion option.



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