

PROJECT COST MANAGEMENT



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INTERMEDIATE INTRODUCTION

Course Description

This course covers the concepts and functionality you need to know in order to use the InEight Estimate software successfully. As a result, you will be able to build cost estimates and bid proposals with precision and efficiency.

Course Objectives

As a result of this course, you will be able to use the InEight Estimate software to:

- Review and report on project information
- Integrate with MS Excel and scheduling software (MS Project or Oracle Primavera)
- Manage quotes and use additional time-saving tools

How to Use this Manual

This training manual serves as the working guide during the *E101 Essentials of Project Modeling and Estimating* instructor-led course. The first seven lessons of this document follow a natural progression of putting an estimate together, from set up of a project to finalization of a bid. The remaining lessons cover additional functionality that will help you build and review your project estimate more effectively.

Lessons

The following lessons are covered in this course:

	Course Lessons
Lesson	Торіс
Lesson 8	Quote Management
Lesson 9	Reporting
Lesson 10	Data Reproduction
Lesson 11	Excel Integration
Lesson 12	Schedule Integration
Lesson 13	Cash Flow
Lesson 14	InEight Estimate Calculators
Lesson 15	Cost Item Assemblies

Lesson Format

This manual is designed to be a "hands on" learning guide. As such, each lesson is organized into sections:

Section	Description
Objectives	Specify what you will learn in each lesson.
Topics	Organize the subject matter, with explanations of key concepts and terms.
Step by Steps	Walk you through the "mechanics" of how to perform specific functions in the software. For each step by step, you will use the Training Job that comes pre- loaded in the InEight Estimate Estimating software.
Exercises	Allow you to practice and reinforce what you learn. For each exercise, you will use the Training Job that comes pre-loaded in the InEight Estimate Estimating software.
Review	Asks you questions to check what you have learned within each lesson.

Call-Outs

Throughout the document, you will also find important call-out banners.

TIP Tips are for important notes and information you want to remember.

NOTE Notes are for critical information you need to know.

Ongoing Use

This manual is also designed to be a comprehensive reference guide you can use outside of the classroom and revisit as needed. Each lesson is compartmentalized so that you can refer back to each lesson as needed.

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LESSON 8 – QUOTE MANAGEMENT

Lesson Duration: 60 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create and publish RFQs
- Define quote pricing
- Compare and award quotes
- Create and analyze scope items

Lesson Topics

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8.1 QUOTE MANAGEMENT OVERVIEW

8.1.1 Quote Management Workflow

When you make the decision to send out RFQs (Requests for Quote), as the estimator you will outline the specifications for the request, select the vendors you wish to contact, and issue the request for quotes.

When you receive quotes back from vendors, you can enter their pricing into InEight Estimate, where you can compare them, award them, and update your CBS costs in one fluid process without the need to re-enter data in multiple locations. InEight Estimate lets you enter multiple vendor quotes to enable price comparison.

TIP

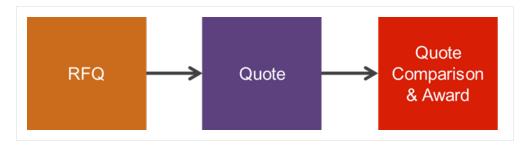
Awarding a quote in InEight Estimate does not mean the vendor is awarded the contract, but rather that their price is selected as the carrying cost in the bid.

InEight Estimate provides a built-in workflow for managing your quotes, consisting of three steps:

- 1. Creating and publishing Requests for Quote (RFQs)
- 2. Updating quotes with vendor/subcontractor pricing
- 3. Comparing and awarding quotes

InEight Estimate has a separate form to manage each step:

- 1. Request for Quote (RFQ) Register
- 2. Quote Register
- 3. Quote Comparison & Award



8.1.2 Quotes and Quote Groups

Typically, an estimate contains two types of quotes:

- 1. Quotes for resources (materials, equipment) purchased or rented from suppliers.
- 2. Quotes for subcontracted work.

In InEight Estimate, quotes from suppliers are managed at the resource level. In other words, you can use material resources to represent the items purchased from the supplier.

For the cost items in your project that you plan to subcontract, you can manage quotes at the cost item level, using the cost items themselves as the descriptions on the quote request.

You can use Quote Groups to group together multiple resources or cost items that will be sent in an RFQ package. Using quote group tags can save a great deal of time generating packages of items to request quotes for.

8.1.2.1 Resource Level Quote Groups

Resource Rate Register 🛛 🔘

When sending out quotes, you may want to organize your resources into groups based on the type of material, such as pipe, aggregate, or concrete. When creating Requests for Quote, you will be able to select your pre-defined quote group and it will bring all the related resources along with it. You can assign quote groups using a pre-defined tag called a Quote Group in the Resource Rate Register.

Below is an example of resources with a quote group assigned:

esourc	e kate	e kegister	0								
All La	abor	Construction	Equipment	Rented Constructi	on Equipment	Installed M	aterial	Installed Equipment	Suppli	ies	Unique
rag colu	mns hei	re to group									
Res Cod	ource e	<u>=</u>	Description		Quote Group		Resour Descrip			Unit Mea	of sure
+ 1	IECT Cooling Towers				Process Equipm	nent Install	Standa	ard Installed Equipment Rate		Each	n i
+ 1	IEFC		Feeder Con	trols	Landscaping W	/ork	Standa	Standard Installed Equipment Rate			n
+ 1	IEHS		Heating Sys	tem	Process Equipm	nent Install	Standard Installed Equipment Rate			Each	n i
+ 1	+ IEPHP Pump High Pressure		ressure	Commercial Wo	ork	rk Standard Installed E		Rate	Each	n	
+ 1	IERMT		Raw Materia	al Tank	Concrete Mate	rials	Standard Installed Equipment Rate			Each	h
+ 1	IERS		Recovery S	ystem	Process Materi	als	Standa	ard Installed Equipment F	Rate	Each	n
+ 1	IEST		Separator T	ank	Process Materi	als	Standa	ard Installed Equipment F	Rate	Each	n

8.1.2.2 CBS Level Quote Groups

For your subcontracted items, you can assign quote groups at the cost item level to group together subcontractor work, such as Commercial Work or Landscaping Work. These labels are assigned using a pre-defined tag called Quote Group in the Cost Breakdown Structure register.

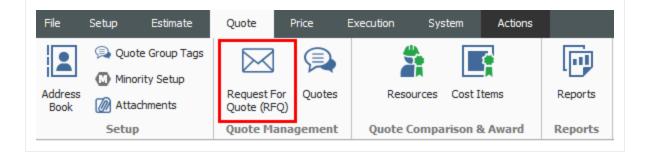
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Quote Group 🛛 🝸
1 3	Paint Existing Steel Bridge Structure	1.00	Lump Sum	Structural Painting
14	Process Equipment	1.00	Each	Process Equipment Install
17	Toll Booth	1.00	Each	Commercial Work
+ 18	Guardrail Type 2	1,000.00	Linear Feet	Guardrail Work
+ 19	Guardrail Type 3A	200.00	Linear Feet	Guardrail Work
+ 20	Type 4 Signs	1,000.00	Square Feet	Sign Work

8.2 REQUESTS FOR QUOTE

Requests for Quote (RFQs) are invitations to sellers that include a requested list of items or services/pricing and terms. When you create an RFQ in InEight Estimate, you are able to indicate the line items you want to include in the quote, and the vendor(s) to whom you want to send it.

8.2.1 Request for Quote (RFQ) Register Overview

To access the Request for Quote (RFQ) Register, from the InEight Estimate landing page, select the Quote tab, then click on Request for Quote (RFQ).

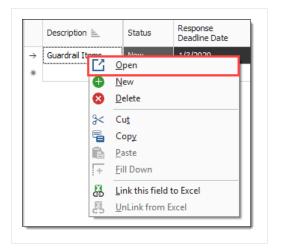


• The RFQ register lists all of the RFQs you've created, with a Description, a Status, and a Response Deadline Date

Co	st Breakdown Struc	ture (CBS)	Register	Resource Rate Reg	ster Re	equest for Quote	(RFQ) Register 🛛					
Drag columns here to group												
	Description 🛓	Status	Response Deadline Date	Response Deadline Time	Published Date	RFQ Instructions	Buyer's Special Terms	Tag 1	Tag 2	Tag 3	Notes	
	Guardrail Items	New	1/3/2020	11:00 AM		D	D				D	
÷						D	D					

8.2.2 Request for Quote (RFQ) Record

You can double click on the row header, or right-click on any request for quote in the Request for Quote Register and choose **Open** to access an existing Request for Quote (RFQ) Record.



Overview – Request for Quote (RFQ) Record

	Name	Definition
1	RFQ Description	Each record contains a Description, Deadline Date and Deadline Time fields to identify the RFQ and indicate when a response is due.
2	RFQ Tabs	The record is organized into tabs where you can define the items for the quote, terms & conditions, and the seller companies to receive the RFQ.
3	Status and Published Data	The Status and Published Date let you know if it is new or published (sent out), and when it was published.

-	ublish ireate Quo Process	te										
Requ	uest for Q	uote (RFQ) R	legister	st for Quote	(RFQ) Record	0					3	-
	scription Jardrail Iter	ms		•						Status Published Date	New	
Lin	sponse De e Items sources	eadline Date: Terms & Conc Cost Items		Response Companies Attachn		: 11:00:00 AM						
Dra	g columns l	here to group				Fir	id: [Search Fo	r] …	Saved views:	Previous View		•
	CBS Position	Code ៉	RFQ ID	Quote Group 🚊	Optional Code	Description	Quantity	Unit of Measure	Currency	Tag 1	Tag 2	Tag 3
→	18		18	Guardrail Work	1500 0 100	Guardrail Typ	1,000.00	Linear Feet	U.S. Dollar		Guardrail	
ι.	19		19	Guardrail Work	1500 0200	Guardrail Typ	200.00	Linear Feet	U.S. Dollar	Estimat	Guardrail	
*							ок	Canc	el New		ev	► Next >

8.2.3 Create an RFQ

When putting together your RFQs, you will be able to select the appropriate material resources and cost items for which you need quotes in your estimate. To create a new RFQ, you have a few options:

- Create RFQ from scratch: This creates an empty RFQ Record for you to define
- Create RFQ from Quote Group Tag(s): This option lets you create an RFQ from a quote group so you can add multiple materials or subcontract items at once
- Create RFQ using Default Seller data: In your address book you can store vendors with a list of their default materials. This option lets you select the vendor and have it automatically find their

materials in the job

🛞 New RFQ	
Cost Item Identification	
Use the following field: CBS Position Code	• •
Please select from the following options:	
• Create RFQ from scratch	🛆 Description
○ Create RFQ from Quote Group Tag(s)	
Only show Quote Group tags that are currently utilized in this job	
On the resulting RFQ record, only list resources with utilization currently greater than zero	
○ Create RFQs using Default Seller data	
This option scans the job for all Resources and Quote Groups utilized in the job. For any that are listed in the Address Book as 'Default Quotes' for the Sellers you select on the subsequent selection register, a new RFQ record will be added for each Seller listing their default items.	
Create separate RFQ records for each Quote Group, per seller?	
ОК	Cancel

The rest of this section walks through each tab on the RFQ Record in more detail.

8.2.3.1 Line Items

The Line Items tab lists the resources or cost items selected for the RFQ, including the Description, Quantity, Quote Group, Currency and other user-defined tags.

l in	e Items	Terms & Con	ditions	Seller Companies	Attachme	ents Set	an			
	sources	Cost Items		beier companies	, record and					
Re	sources	Cost Items								
Dra	g columns	here to group			Find:	[Search Fo	or] … S	aved views: Pr	evious View	•
	CBS Position	Code 🖹 🔻	RFQ ID	Quote Grou Tag	• ≞	Optional Code	Description	Quantity	Unit of Measure	Currency
			18	Guardrail W	ork	1500 0 100	Guardrail Typ	1,000.00	Linear Feet	U.S. Dollar
÷	18									

8.2.3.2 Terms & Conditions

This tab provides ample space for you to enter terms, conditions and instructions that need to be included on the RFQ.

Line Items	Terms & Conditions	Seller Companies	Attachments	Setup	
Buyer's Spec	cial Terms & Conditions -				
ny penaltie	s assessed by the owne	er due to quality contr	ol compliance dev	iations by the supplier will be deducted from teh supplier's payment.	~
ny penaltie	s assessed by the owne	er due to quality contr	ol compliance dev	iations by the supplier will be deducted from teh supplier's payment.	^
ny penaltie	es assessed by the owne	er due to quality contr	ol compliance dev	iations by the supplier will be deducted from teh supplier's payment.	
		er due to quality contr	rol compliance dev	iations by the supplier will be deducted from teh supplier's payment.	~
RFQ Instruct			·	· · · · · · · ·	

8.2.3.3 Seller Companies

You will use the Seller Companies tab to select the suppliers or subcontractors that will be receiving the RFQ. This is done by selecting them from the InEight Estimate Library Address Book. This tab will store all of the pertinent contact information for each seller, including their fax number and/or email address so that you can send them the RFQ.

in	e Items	Terms & Conditions	Seller Co	mnanies	Attachments	Setup				
	e ricino	Terms & conditions	belief 60	mpunico	Actionmento	betap				
ra	g columns	here to group								
	Compan Name	у	<u>=</u>	First Name	Last Name	Status	Publish Item Quantities	Publish by Fax	Fax	Publish by Email
÷	Example	Sub #1 Harry Belefor	ny	Harry	Belefony	New	✓	~	222-221-2	~
	Example	Sub #2 Mel Blank		Mel	Blank	New	~	\checkmark	222-222-1	\checkmark
	Example	Sub #3 Frank Matty		Frank	Matty	New	✓	\checkmark	222-222-3	\checkmark
*										

The following options are particularly noteworthy:

- **Publish Item Quantities**: If you want the RFQ to specify your take-off quantities, select this checkbox. If you want to keep that information to yourself and let the vendors or contractors determine their own quantities, deselect this checkbox
- **Publish by Fax**: If you choose to publish by fax, InEight Estimate creates a Word document with a template filled out. It is ready to print and send, but you have the opportunity to double-check the information before emailing the RFQ
 - NOTE When RFQs are generated for multiple vendors using the Publish by Fax option, be sure to separate the MS Word document pages and send only the correct pages to each vendor.
- **Publish by Email**: If you choose to publish by email, the Word document is created, the template is filled out, it is attached to an email, and automatically sent to the email address listed for that vendor in the Address Book
 - NOTE When using the Publish by Email option, the process is automatic and it does not give you the opportunity to double check your information before the RFQ is emailed. For this reason, it is recommended to Publish by Fax, review the information, and then email the RFQ manually.

8.2.4 Attachments

This tab allows you to specify any electronic files that need to be attached to the RFQ, such as drawings or specifications for the work.

Response D	eadline Date:	1/3/202	0	• F	Resp	onse Deadli	ine Tir	ne: 11:00 AM		
Line Items	Terms & Cond	itions	Seller Co	mpanies	Att	achments	Set	qu		
Drag columns	here to group									
File Nam	e 🛓	Descrip	tion	Location		File Type		File Size	Attached By	Date Attached
→ File Expo	ort.pdf 🛛 🔊	Plumbir	ng quote	C:\Users\	к	Adobe Acro	ob	58640	karen.loftus@i	11/19/2019 8:00:16 AM

8.2.5 Setup

The Setup tab lets you indicate what information will display on the published RFQ template, including custom tags. In addition to selecting tags and adding notes on the Setup tab, you can also specify your RFQ Publication Settings and can choose whether you want to include the instructions, special terms and conditions, notes and attachments.

Response D	eadline Date: 1/3/2	020 👻	Response Deadl	ine Time:	11:00 AM	
Line Items	Terms & Conditions	Seller Companies	Attachments	Setup		
	Tag 1:	-	Notes			
	Tag 2:	•]			
	Tag 3:	-]			
-RFQ Publica	ation Settings					
Cost Item I	dentifier: CBS Po	osition Code 🔹 👻				
✓ Include ✓ Include	RFQ Instructions Buyer's Special Terms Notes Attachments	s & Conditions				
 ✓ Publish ✓ Publish ✓ Publish 						

8.2.6 Publish an RFQ

Once created, InEight Estimate allows you to generate a Microsoft Word RFQ template that can be faxed or manually sent via email to the supplier or subcontractor.

When you complete all of the fields that are required for this RFQ, you are ready to publish the RFQ, To do so, select all of the vendors that you want to receive the RFQ and click **Actions > Publish** on the RFQ Record ribbon.

Step by Step — Create and Publish an RFQ

- 1. Open your job.
- 2. From the InEight Estimate landing page, select the **Quote** tab.
- 3. Select Request for Quote (RFQ).
- 4. From the Actions tab, click on the **New** icon to create a new RFQ.
- 5. Select **Create RFQ from Quote Group Tag(s)**, leaving the checkboxes checked to only show quote groups and resources that are being used.
- 6. Select a **description** from the panel.

New RFC	2
Cost Item Identification	
Use the following field: CBS Position Cod	e 🔹
Please select from the following options:	
○ Create RFQ from scratch	Description [Uncheck All]
Oreate RFQ from Quote Group Tag(s)	Blanks]
Only show Quote Group tags that are currently utilized in this job	Commercial Work Concrete Materials Guardrail Work
On the resulting RFQ record, only list resources with utilization currently greater than zero	Landscaping Work Manhole Materials None
O Create RFQs using Default Seller data	Painting Materials Pipe Materials Process Equipment Install
This option scans the job for all Resources and Quote Groups utilized in the job. For any that are listed in the Address Book as 'Default Quotes' for the Sellers you select on the subsequent selection register, a new RFQ record will be added for each Seller listing their default items.	 Process Equipment Instail Process Materials Sign Work Structural Painting Aggregates
✓ Create separate RFQ records for	

- 7. Click **OK**.
 - The Request for Quote (RFQ) Record is created with two aggregate line items
 - The Description field is automatically filled with the name of the quote group

Description Aggregates]				
Response D	eadline Date:	12/27/2	2018	•	Respon:
Line Items	Terms & Con	s & Conditions Seller Co			Attack
Resources	Cost Items				
Drag columns	here to group				
Code 🗎	Quote Tag	Quote Group		Description	
→ MBR	Aggre	gates		Aggregat	
MDIRTB	Aggre	gates		Dirt Class B	

8. In the Response Deadline Date field, select **a date** two weeks from today, and for the Response Deadline Time, type a **time stamp** (e.g. 2:00 pm).

Response D	eadline Date: 1/31/20)20 -	Response Deadl	ine Time:	2:00 PM
Line Items	Terms & Conditions	Seller Companies	Attachments	Setup	

- 9. Select the Terms & Conditions tab.
- 10. Create and type in any **special conditions** in the Buyer's Special Terms & Conditions field.
- 11. Type in **instructions** in the RFQ Instructions field.

Response D	eadline Date: 1/31/20)20 -	Response Deadl	ine Time:	2:00 PM
Line Items	Terms & Conditions	Seller Companies	Attachments	Setup	
Buyer's Spec	ial Terms & Conditions				
Prices are go	ood for the duration of t	he contract			^
RFQ Instruct	tions				
All items to b	e delivered to jobsite by	/ supplier's trucks			^

12. Select the Seller Companies tab and click in the first blank row in the Company Name column.



- 13. Click on the **Address book** icon, and then select vendors.
- 14. Click OK.
- 15. Make sure **Publish by Fax** is checked for all sellers, and that they all have Fax numbers.
 - Also make sure **Publish by Email** in unchecked for each vendor

Re	sponse Deadline Date: 1/31/2020	-	Response	Deadline Time	2:00 PM					
Lin	ne Items Terms & Conditions Sel	er Companies	Attachm	ents Setup						
Dra	g columns here to group				Find: [Search Fi	w]	Saved views	: Previous V	few	٠
	Company E	First Name	Last Name	Status	Publish Item Quantities	Publish by Fax	Fax	Publish by Email	Phone	Mobile Phon
	Example Vendor 1 Pat Roberts	Pat	Roberts	New	v		222-123-1		111-123-2	
	Example Vendor 2 Stan Mark	Stan	Mark	New	1	v	222-123-2		111-133-2	
	Example vendor 2 Stan Mark									

16. Select the sellers to whom you want to send the RFQ.

Company 🚊	First Name	Last Name
Example Vendor 1 Pat Roberts	Pat	Roberts
Example Vendor 2 Stan Mark	Stan	Mark
Example Vendor 4 DBE Lester Slim	Lester	Slim

17. Under the Actions tab of the record, select **Publish** to create your RFQ document.

© 1	-								
File	Setup	Estimate	Quote	Price	Execution	System	Actions		
📑 Pub									
🕑 Cre	ate Quote								
Pro	ocess								
Cost B	reakdown	Structure (CB	S) Register	Re	quest for Quo	te (RFQ) Reg	ister	Request for Quote (RFQ) Record	0

• MS Word opens the file automatically for you to review; and from here you can either print it or send it in an email as an attachment

RE											
Job: Training Job	Training Job - Maricopa County	No. TM2924									
TO:	TO: FROM:										
Name: Company:	Pat Roberts Example Vendor 1 100 Tenth Street Hometown, AZ 889060	Name: Company:	Tom Cross Example Prime Contractor 1 400 First Street Suite 4000 Hometown, AZ 889004								
Phone: Mobile Phone: Fax: Email:		Phone: Mobile Phone: Fax: Email:	111-122-1111 222-112-2211								
Job Information	Training Job	- Maricopa County No. TM2924									
Owner:		Example Owner									
Job Type:		Highway and General Engineering									
Job Location:		I-10 MP 100 to MP 120									
City:		Phoenix									
County:		Maricopa									
State / Province:	Arizona										
Country:	United State	-									
Bid Location:	Engineer's C	Office									
Bid Date:	1/8/2020										
	10:00 PM										
Bid Time:	m: English										
Bid Time: Measurement Syster											

18. Click **OK** to save the RFQ Record.

8.2.7 RFQ Email Draft

When sending out Requests for Quotes (RFQ) on a bid, it is essential to be able to effectively communicate the project requirements to potential subs or suppliers to ensure you have good quote coverage within your estimate. Email RFQs open as a draft email message, giving you, the sender, the opportunity to control specifically what is sent and customize the message before sending it out to subs and suppliers.

B 9 70 ²	× () ₹	RFQ from InEight C	orporation - SKIP	for Training Job - Infrastructure: Training Job - Maricopa County No. TM2924 - Message (HTML) 🔳 —		
File Messag	e Insert (Options Format	Text Review	v Help Q Tell me what you want to do		
	-					
ñ - 🗳 🗌	Times New Ro	• 12 • B	I <u>U</u>	◢੶ਸ਼੶ਸ਼੶ਸ਼੶ਸ਼੶ਸ਼੶ਸ਼੶ਸ਼	» · · · ·	
⊳ Send	To O C	Charlie Bravo				
		from InEight Corporation	on - SKIP for	r Training Job - Infrastructure: Training Job - Maricopa County No. TM2924		
			RE	EQUEST FOR QUOTATION		
Job: Training Jol	b-1 Training Job - Ma	aricopa County No. TM2	924			
TO:			FROM:			
Name: Company:	Company: Example Sub #1 Compa 600 First Street Suite 6000 Hometown, AZ 889006 Phone: Phone: 111-222-1111 Pho bbile Phone: Mobile Pho Mobile Pho		Name: Company:			
Mobile Phone:			Phone: Mobile Phone: Fax:	e:		
	charlieb1234@example.com Email:					
Job Informat	ion:	Training Job-1 Training Job - Maric	opa County No. TM	M2924		
Owner:		Example Owner	opu obuitty rite. rit			
ob Type:		Highway and Generation	al Engineering			
lob Location:		I-10 MP 100 to MP 1	120			
City:		Phoenix				
County:		Maricopa				
tate / Province:		Arizona				
Country:		United States				
Bid Location:		Engineer's Office				
Bid Date: Bid Time:		1/6/2020 5:00 AM				
	uote (RFQ) Ir	1				
	8/21/2020 3:57 PI					
leananan Deadli	ne Date: 7/29/20	09 11:00 AM				

8.3 QUOTES

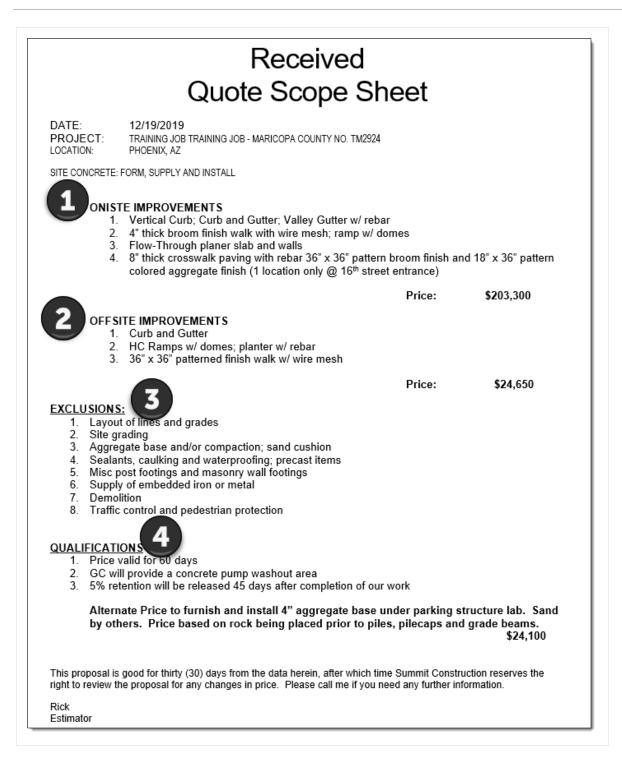
When you receive responses to your RFQ, the next step is to enter their pricing in the Quote Register. The Quote Register stores all of the quotes you have for that job. Each quote has a Description and a Quote Status, and each quote displays seller contact information.

In this case, an estimator in charge of receiving quotes would need to determine how best to input these quotes within the Quote register.

8.3.1 Sample Received Quote Scope Sheet

Overview – Received Quote Scope Sheet

	Name	Description
1	Section one	Scope item one includes 4 items the subcontractor has considered as work to be done onsite. You may want to consider adding all 4 items as individual quotes. Then creating a package identifying these quotes as on-site work, totaling \$203,000.
2	Section two	Scope item two includes 3 items the subcontractor has considered as work to be done offsite. You may want to consider adding all 3 items as individual quotes. Then creating a package identifying these quotes as offsite work, totaling \$24,650.
3	Exclusions	The subcontractor is showing 9 items they excluded from their scope of responsibility.
4	Qualifications	The subcontractor has included 3 stipulations pertaining to this bid. If selected all 3 are considered accepted terms.



8.3.2 Quote Register Overview

To access the Quote Register, choose **Quote > Quotes** on the main InEight Estimate menu or click the **Quotes** icon on the toolbar.

Qu	ote Register 🛛								
Drag	g columns here to group								
	Description	<u>=</u>	RFQ Description	Quote Status	Seller	Company	Quote Total	Awarded Total	Currency
	Aggregates		Aggregates	Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$402,192.00	\$402,192.00	U.S. Dollar
	Aggregates		Aggregates	Accepted	Examples Vendor 4 DBE Les	Example Vendor 4	\$0.00	\$0.00	U.S. Dolla
	Aggregates		Aggregates	Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$0.00	\$0.00	U.S. Dolla
凶	Asphalt Materials			Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$1,115,97	\$1,102,50	U.S. Dollar
<u>&</u>	Asphalt Materials			Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$1,263,17	\$13,671.00	U.S. Dolla
	Electrical Work		Electrical Work	Accepted	Architectural Designs, Inc	Architectural Desig	\$4,200.00	\$0.00	U.S. Dolla
	Electrical Work		Electrical Work	Accepted	HD Engineering Group Rog	HD Engineering Gr	\$4,450.00	\$0.00	U.S. Dolla

8.3.3 Quote Record Overview

The Quote Record establishes who the vendor is, along with quoted prices and all terms and conditions. Once a requested quote returns, you can either create the quote in InEight Estimate from scratch or convert the original RFQ to a quote and enter the supplier or subcontractor pricing. Each Quote Record contains additional fields and options for managing the quote.

Quote Records utilize data blocks allowing you to reposition tabs, detach tabs into individual windows, and redock tabs in new locations. Using the data blocks layout, you can input and maintain important quote data like Vendor Qualifications and Special Terms & Conditions.

Right click on any existing quote in the Quote Register and choose **Open** to access the Quote Record.

Name		Description
1	Header block	You can include detailed contact information about the supplier or subcontractor. This automatically fills when you select the seller from the Address Book. The External Ref field can be used to access information specific to the bid/quote.
2	Price block	The Price data block contains a breakdown of pricing information for the quote, including taxes, item conditions, and special conditions.
3	Quote tabs	The tabs at the bottom of the screen hold detailed information regarding the quote.
4	Default Data Blocks	Data blocks include Special Terms & Conditions, Qualifications, Packages, Taxes, Seller's Profile, Setup, and Minority.

Overview – Quote Record

	Description:	Pipe Materials				- 6		Optional Code:				led Price:	2	\$250,744
	Contact:	Example Vendor 4	DBE Lester Slim 🏼 🕚 🔳	Phone:	111-122-1321			Date:			Titem 1			\$12,537
	Company Name:	Example Vendor 4	DBE	Mobile:				Source:			Quote Bond:			
	First Name:	Lester		Fax:	222-132-1234			Currency:	U.S. Dollar			onditions:		\$0
	Last Name:	Slim		Email:				Status:	Received		Specia	Conditions:		
	External Ref.:							Ignore:	Reason:		Total			\$263,281
les	sources Cost It	ems 3						Special Terms & Co	nditions					;
rag	columns here to g		[Search For] ···	Saved views	: Previous Viev	v	•	Buyer's Special Term	s & Conditions	4				
	Code 🖭 🛛	Quote Group 🖮	Description	No Split	Free	Awarded	Duration							0
4	MPP10 F	ipe Materials	Pipe 10" PVC SDR21	- Spit		✓		Seller's Special Te	erms & Conditions					
		Pipe Materials	Pipe 24" PVC SDR35	V		 ✓ 								^
	MPR36 F	Pipe Materials	Pipe RCP 36 In	V		✓								\sim
*								Special Conditions A	-	\$0.00				
									-	enly 🔘 Using Weighted Aver				
								Include Special Co	onditions costs for	unawarded quotes in Compara	ble lotais			
								Drag columns here to		Find: [Search For]	··· Saved	views: Previou	ıs View	-
								Row Number	Scope Item				% of Total	
										is Packages Taxes Selle				

8.3.4 Header Block

The Header block portion of the screen is where you enter in description information pertaining to the quote, along with vendor/contractor information.

There is an **External Ref** field you can use as a hyperlink for attaching any supporting bid quote attachments from the vendor/contractor.

On the right portion of the header block is where you enter optional information related to:

- **Optional Code** a code used to reference the received quote.
- Date date the quote is received.
- **Source** this is the method by which the quote was received. The options are email, fax, hard copy, phone, and other.
- Currency system of money in general use for a particular country..
- **Ignore** by ignoring the quote, and providing a reason, the quote will turn grey in the Quote Comparison & Award screen.

8.3.5 Price Block

The Price block includes the quotes extended price, along with any additional taxes, bonds, item conditions, and special conditions.

8.3.6 Quote Record Tabs

8.3.6.1 Resources & Cost Items

The Resources & Cost Items tab displays the resources or cost items quoted, along with their estimated quantities and units of measure.

- A Unit Price column is included on this tab for entering the quoted pricing from the seller, either manually or by pasting from an electronic format
- If a Package code is entered, the Unit Price field is greyed out, and the Package code amount is used
- Additional columns are provided for making conditional amount or percentage adjustments to the quote to manage last-minute changes
- A note field is included for explanation changes
- A No Split option indicates that the seller will only provide the quoted goods or services if they are selected to provide all listed items. They will not provide one quoted item without you procuring all others from them as well.
- You can check an item as Free for circumstances where the vendor will include the price of one item with another. Marking the included item(s) as free reminds you there is no quoted price for that item

g columns here	e to group							Find:	[Search Fo	r] …	Saved views:	Previous View	-
Package	Code 🖮	RFQ ID	Quote Group	Optional Code	Description	No Split	Free	Awarded	Du	Quantity	Unit of Measure	Unit Price	Extended Price
	3.1	3.1		3.1	Excavation, scrapers	~			1	50,000.00	Cubic Yard	\$0.00	\$0.
P1	3.2	3.2		3.1	Excavation, trucks	~			1	50,000.00	Cubic Yard	P1	P1 \$200,000.
P1	3.3	3.3		3.2	Embankment	~			1	50,000.00	Cubic Yard	P1	P1
P1	3.4	3.4			Rock Excavation	✓			1	3,000.00	Cubic Yard	P1	P1

Cost item tags and user defined fields

There are 25 tag fields in the Quote Record register cost items tab. There are also 15 user defined fields that let you sort, filter, and group on selected quote records more efficiently.

For example, you can use tags and user-defined fields to isolate certain cost items, or group cost items together.

ieader																		Total			
Descrip	tion: Guard F	ail Items									0	ptional Code	:					Extended Price	:0:		\$30,200.00
Cor	tact: Example	Sub #2 N	fel Blank	0		Phone:	111-222-32	2				Date	:				*	Item Taxes:			\$0.0
Company N	ame: Example	Sub #2				1obile:						Source	-				•	Quote Tax: Bond:			
First N	ame: Mel					Fax:	222-222-11	1				Currency	U.S. D	olar			•	Item Conditio	ins:		\$0.0
Last N	ame: Blank					Email:					Status:	Receiv	Received			Special Conditio		ins:			
External	Ref.:	Blank Email:					Ignore: Reason: -			Total:			\$30.200.0								
rag columns her	e to group																	Save	ed views: St	indard View	- ,
Code 🚋	RFQ ID	Tag 11	Tag 12	Tag 13	Tag 14	Tag 15	Tag 16	Tag 17	Tag 18	Tag 19	Tag 20	Tag 21	Tag 22	Tag 23	Tag 24	Tag 25	User Defined 1	User Defined 2	User Defined 3	User Defined 4	User Defined 5
6.1					Pipe	Concre.											11 inch copp	plastic casing			
6.2																					

8.3.7 Data Blocks

The Quote Record utilizes data blocks that allows you to customize the layout and focus on data block tabs that matter most to you. You can select the default data block action in the ribbon to revert back to the default setting, which shows all six data blocks.

Data Block tabs include:

- Special Terms & Conditions
- Qualifications
- Packages
- Taxes
- Seller's Profile
- Setup
- Minority



The six data blocks appear at the bottom right of the screen.

Buve	er's Special Terms	& Conditions							
, u y c	era opeciar remia	a conditions						~	
								0	
7 Se	eller's Special Ten	ms & Conditions							
_	•							\wedge	
								Q	
neci	rial Conditions Adi	iustments:	<0.00 I						
	tial Conditions Adj		\$0.00						
Distr	ribute Special Con	ditions:	Jsing Weighted Aver	-					
Distr	ribute Special Con		Jsing Weighted Aver	-					
)istr] In	ribute Special Con nclude Special Con	ditions: Evenly L	Jsing Weighted Aver	ble Totals	Saved views:	Previous View	Ŧ]	
)istr] In	ribute Special Con nclude Special Con g columns here to g	ditions: Evenly L	Jsing Weighted Aver	ble Totals	Saved views:	Previous View	-]	
)istr] In Drag	ribute Special Con nclude Special Con	ditions: Evenly L	Jsing Weighted Aver	ble Totals	Saved views:	Previous View % of Total	• Notes]	
)istr] In)rag	ribute Special Con nclude Special Con g columns here to g	ditions:	Jsing Weighted Aver d quotes in Compara Find: [Sear	ble Totals]	
)istr] In)rag	ribute Special Con nclude Special Con g columns here to g Row Number 🗎	ditions: Evenly O L ditions costs for unawarded roup Scope Item Mobilization	Jsing Weighted Aver d quotes in Compara Find: [Sear Quote Group 🛓	th For] ····]	

It's possible to move the entire data block, or individual data blocks to other parts of the screen. For example, select the Special Terms & Conditions header row, and drag to the desired part of the screen.

Special Terms & Conditions drag and move
Buyer's Special nums & Conditions
Seller's Special Terms & Conditions

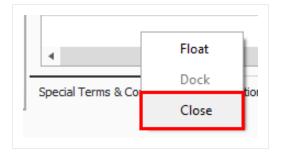
Drop the data block on top of an arrow where you wish to land the data block.

. ~	ode 🚊 🛛 F	RFQ I	D Quote Group 🖮	Optional Code	Description	No Sp	lit Free	Awarded	Duration	Quantity	Unit of Measure
2	0		Sign Work	1600 0230	Type 4 Signs	[I		1	1,000.00	Square Feet
Spe Dis	ecial Conditions	s Adju Cond	is & Conditions ustments:		-				0		+ + +
Dra	ag columns here	to gr	oup	Find: [Sear	rch For] ···	Saved views:	Previous View		•		
	Row Number =		Scope Item	Quote Group 🛓	Included	Amount	% of Total	Notes			
			Mobilization	Sign Work							
÷			Survey/Layout	Sign Work	✓	\$500.00	4.55		_		
÷			Temporary Traffic contr	Sign Work	~				<u> </u>		

The data block will now reside on the left side of the screen.

Description:	Sign Items				Opt	ional C	ode	:	
Contact:	Example Sub #3 Frank Matty	Phone:	111-333-3434			(Date	:	
Company Name:	Example Sub #3	Mobile:				So	urce	:	
First Name:	Frank	Fax:	222-222-3232			Curre	ency	U.S. Dollar	
Last Name:	Matty	Email:				St	atus	: Received	
External Ref.:						Igi	nore	: 🗌 Reason:	
oecial Terms & Co	nditions				>	×	Res	sources Cos	t Items
uyer's Special Term	is & Conditions					^	Drag	columns here t	to group
					\sim			Code 🖦	RFQ ID
] Seller's Special Te	erms & Conditions						÷	20	
					\sim		*		
pecial Conditions A	djustments: \$0.00								
) istribute Special Co	onditions: Evenly Using Weighted Av	/erage							
] Include Special Co	onditions costs for unawarded quotes in Compa	-							
	group Find: Search For]	Sa	ved views: Previous	View	•				
orag columns here to									
Drag columns here to Row Number ≞	Scope Item Quote Group	_ Include	d Amount	% of Total	Notes				

You can also close a specific tab if it's not commonly used. In this example, you can right click on a tab (like Special Terms & Conditions) and select close.



8.3.8 Data Block Tabs

8.3.8.2 Special Terms & Conditions

Special Terms & Conditions is where you can include buyers and sellers special terms, add fixed cost to the quote, and include/exclude scope items.

	er's Special Terms	& Conditions						
							0	
7 s	eller's Special Ter	ms & Conditions					~	
-							^	
							~	1
peo	ial Conditions Adj	ustments:	\$0.00					
liet	ribute Special Con		lsing Weighted Average					
11	iclude Special Con	ditions costs for unawarded	d quotes in Comparable	lotals				
Drag	g columns here to g	iroup	Find: [Search F	or] …	Saved views:	Previous View	*	
	Row Number 📒	Scope Item	Quote Group 🚊	Included	Amount	% of Total	Notes	
		Mobilization	Sign Work	~				
÷	1				\$500.00	4.55		
÷	1	Survey/Layout	Sign Work					
÷	-		Sign Work Sign Work	✓				
÷	2							

8.3.8.3 Qualifications

This tab allows you to include bond. You can enter the bond rate and the system will calculate the total Bond Cost or vise versa. This tab also allows you to enter insurance contact information and seller license information. If the vendor in the address book already had this information, then this information will get pre-filled when the seller is assigned to the Quote.

Qualifications		×
Bond		
Seller can provide a BC	ND for all work quoted	
Bonding Company:		
Bonding Agent: AME	RICAN	
Bonding Phone:		
Add Bond Cost to the	Quote	
Cost of BOND to be adde	d to quoted price :	
Rate/\$1,000: 🕨	\$30.00	
Bond Cost:	\$330.00	
Seller is INSURED as re Insurance Compar		
Insurance Ager	at: AMERICAN	
Insurance Phon	e:	
License		
Seller is LICENSED to p	perform all work quoted	
Licens	pr:	
Cla	55:	
1	D: EZ-License-A1	
Special Terms & Conditions	Qualifications Packages Taxes Seller's Profile Se	tup Minority

8.3.8.4 Packages

Using the Packages feature allows you a way to arrange quotes into a collection which makes sense for packaging your quotes. You can determine how to intake quotes from subcontractors and classify them into a package grouping.

By creating a Package code within the Packages block, and giving it a dollar value, you can then assign that package code to one or many quote records. In this case, the subcontractor provided quotes for both on site and off-site concrete work. You can then determine which individual quotes go with the on site or off-site package. The Package Amount field carries over to the Extended Price field under the Cost Items tab.

ra	g columns here	to group Find:	[Search For] Sa	ved views: Previou	s View	-	Dra	g columns here	to group		Find: [Search For]	
	Package	Code ៉	RFQ ID	Unit Price	Extended Price	Currency	Default Tax Rate		Code 📃	Description	Amount		
	P1	3.1		P1	P1 \$200,000.00	U.S. Dollar	0.00		P1	On Site	\$200,000.00		
	P1	3.2		P1	P1	U.S. Dollar	0.00		P2	Off Site	\$30,000.00		
	P1	4.1		P1	P1	U.S. Dollar	0.00	→					
	P1	4.2		P1	P1	U.S. Dollar	0.00						
	P1	4.3		P1	P1	U.S. Dollar	0.00						
	P2	5.1		P2	P2 \$30,000.00	U.S. Dollar	0.00	1					
1	P2 -	5.2		P2	P2	U.S. Dollar	0.00						
	P2	20		P2	P2	U.S. Dollar	0.00						
k									2	!			

You can also create a package by selecting multiple items and selecting Add to new Package.

8.3.8.5 Taxes

Item Tax and Quote Tax have been combined to display on a single data block called Taxes. Using the taxes feature allows you to add item taxes to each item's price. You can also add taxes to the quote.

Item Tax Add Item Taxe	s to each Item's	s Price
Quote Tax Add Taxes to f	-	intel an a Danasata an af Tatali
Taxes to be adde Tax Rate:		otal as a Percentage of Total:
Total Tax:	\$0.00	

8.3.8.6 Seller's Profile

The Seller's Profile tab populates with address book notes and alternate contact information.

Seller's Profile							×
Address Book Notes							
ExampleSave for tra	aining AS NEEDED						^
							V
Alternate Contact Info	rmation						
Name:							
Email:							
Phone:							
Fax:							
Mobile:							
Special Terms & Conditi	ons Qualifications	Packages	Taxes	Seller's Profile	Setup	Minority	

8.3.8.7 Setup

This tab provides extra space for any additional notes and tags to be assigned to the quote.

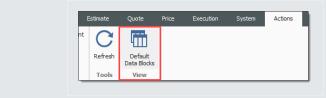
Setup					×
Current	Status				
RFQ S	tatus:				
Last U	pdate: 5/5/2020	7:05:03 PM			
Quote (Origin: WMFarr				
- Tags —	-				
Tag 1:	Pipe	-			
	FIPE	-			
Tag 2:		Ŧ			
Tag 3:		-			
Notes					
					~
					×

8.3.8.8 Minority

This tab allows you to determine if the seller qualifies for any type of minority business, and the ability to apply a certification number.

Minority	×
Minority Business Enterprise	
Seller qualifies as the following type of MINORITY BUSINESS ENTERPRISE on	this job:
DBE DBE Certification:	
MBE MBE Certification:	
WBE WBE Certification:	
OBE1 OBE1 Certification:	
OBE2 OBE2 Certification:	
OBE3 OBE3 Certification:	
OBE4 OBE4 Certification:	
OBE5 OBE5 Certification:	
OBE6 OBE6 Certification:	
OBE7 OBE7 Certification:	
Special Terms & Conditions Qualifications Packages Taxes Seller's Profile	Setup Minority

TIP If any of your Data Blocks become deleted on a Quote Record, simply click the **Default Data Block** icon.



8.3.9 Create a Quote from RFQ

Walk through the steps of creating a quote from an RFQ.

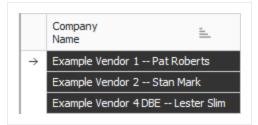
TIP To create a quote from scratch, click the **New** icon on the Quote Register and fill in the quote details and seller fields manually.

Step by Step — Create a Quote from RFQ

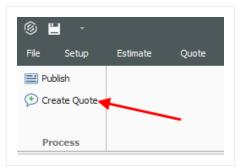
- 1. Open your job.
- 2. From the InEight Estimate landing page, select the **Quote** tab.
- 3. Select Request for Quote (RFQ).
- 4. Open the **RFQ record** for which you've received quotes (e.g. Aggregates RFQ).



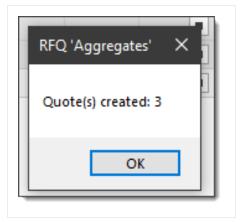
5. Select the **Seller Companies** tab and select the sellers for whom you need to create quotes.



- 6. From the Actions menu, select **Create Quote**.
 - InEight Estimate will create quotes for each of the sellers you selected



• A prompt indicates how many quotes were created, then click OK



- 7. Close the RFQ Record and the RFQ Register.
- 8. To open the Quote Register, select **Quote** from the InEight Estimate landing page.
- 9. Select **Quotes** from the Quote Management section.
 - The quotes that you created from RFQ are now listed on the Quote Register

Qu	ote Register 🛛 🕲				
Drag	g columns here to group)			
	Description	<u>=</u>	RFQ Description	Quote Status	Seller
\rightarrow	Aggregates		Aggregates	Accepted	Example Vendor 1 Pat Roberts
	Aggregates		Aggregates	Accepted	Example Vendor 4 DBE Lester Slim
	Aggregates		Aggregates	Accepted	Example Vendor 2 Stan Mark

8.3.10 Enter Quote Details

Now that you have quotes created, you can enter pricing.

Step by Step — Enter Quote Details

- 1. Open the Quote Record for a seller.
- 2. On the Resources tab, make sure No Split is <u>un</u>checked for all items.

3. Also on the Item Resources & Cost Items tab, now enter the following **unit prices** for the resources:

Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$8.00
MDIRTB	Dirt Class B	\$6.00

4. Click **OK** to close the Quote Record.

Step by Step — Create a Multi-packages Quote

- 1. From the InEight Estimate landing page, select the **Quote** tab.
- 2. Click on the **Quotes** icon under Quote Management.
- 3. Double click on an item (e.g. **Pipe Materials**).

)ra	g columns here to g	roup				
	Description	≞ ▼	RFQ Description	Quot Stati		Seller
÷	Pipe Materials	_		Rece	ived	Example Vend
4	Pipe Materials			Rece	ived	Example Vend
	Pipe Materials			Rece	ived	Example Vend
3	Pipe Materials			Rece	ived	Example Vend

- 4. In the Description field, type in or replace the **description**.
- 5. In the Contact field, select a **contact**.

Cost Breakdown Str	ucture (CBS) Register 🛛 🕲	Quote Regis	ster	Quote Record	8	
Header						
Description:	Pipe Materials for site improve	ements.				
Contact:	Example Vendor 1 Pat Rober	rts			0	2
Company Name:	Example Vendor 1					

- 6. Click OK
- 7. Select the **Cost Items** tab on the left side of the screen.

Re	sources	Cost	Items		
rag	g columns	here to	group	-	
	Code 🛓		Quote	Group ៉	Description
ş	MPP10		Pipe Ma	aterials	Pipe 10" PVC SDR21
	MPP24		Pipe Ma	aterials	Pipe 24" PVC SDR35
	MPR36		Pipe Ma	aterials	Pipe RCP 36 In
K					

- 8. Add a cost item under Cost Items.
- 9. Then, add another **cost item** under Cost Items.
- 10. On the Packages tab, enter the following 2 new records:
 - 1. Code: **P1**
 - 2. Description: On Site
 - 3. Amount: \$200,000
 - 4. Code: **P2**
 - 5. Description: Off Site

6. Amount: **\$300,000**

Pa	ckages		
Drag	g columns here	to group	
	Code 📃	Description	Amount
	P1	On Site	\$200,000.00
\rightarrow	P2	Off Site	\$300,000.00
*			

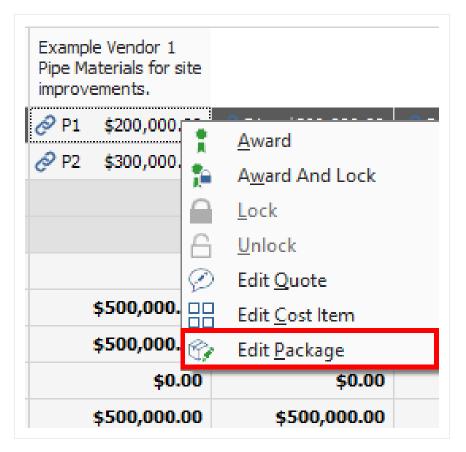
- 11. Type in **P1** under Package for cost item 7.
- 12. Type in **P2** under Package for cost item 8.

Re	sources Cost	Items						Pa	ckages		
Drag	g columns here to	gro Eijnd: [Sea	arch For]	··· Saved view	vs: Previous \	/iew 👻		Dra	g columns here t	o group	
	Package	Code	RFQ ID	Quote Group	Optional Code	Description	No		Code 📃	Description	Amount
	P1	7		Pipe Materials	800 0220	10 Inch PVC Force Main			P1	OnSite	\$200,000.00
1	P2 -	8		Pipe Materials	800 0330	24 Inch PVC Gravity Se			P2	Off Site	\$300,000.00
*								÷			

- 13. Select OK.
- 14. Under the Quote Comparison and Award ribbon, select Cost Items.
- 15. Under Quote Groups, select **Pipe Materials**.
 - Quote Comparison and Award shows the newly created quote with the associated package quotes.

Det	ail	Example Pipe Ma	e Vendor 1 terials	Exampl WBE Pipe Ma	e Vendor 6 aterials	Example Vendor 1 Pipe Materials for site improvments			
۲.	\$22.51	🔗 P1	\$290,000.00	🔗 P1	\$300,000.00	∂ P1	\$200,000.00		
1	\$52.84	🔗 P2	\$126,000.00	🔗 P2	\$125,000.00	Ø ₽2	\$300,000.00		
\$4 3	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
\$4 3	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
\$4 3	28,694		\$0.00		\$0.00		\$0.00		
\$4 3	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
	\$0.00		\$0.00		\$0.00		\$0.00		
		11/13	/2019 4:1	11/1	3/2019 4:4	11/1	3/2019 4:3		

• The Package Price can quickly be modified in the Quote Comparison and Award form by selecting the Edit Package action in the Actions tab or by using the right click context menu.



8.3.11 Use Unit Price or Extended Price on Quote Record Item

It's possible to enter the Extended Price for a Quote Item, and the Unit Price is then calculated, which makes entering quotes more efficient and results in less errors.

	te Record 🛛														
Hea	ıder														
	Description	AsphaltMaterial											Opt	ional Code:	
	Contac	t: Example Vendor	2 Stan Mark			•	Phone:	111-13	3-2123					Date:	
	Company Nam	e: Example Vendor	2				Mobile:							Source:	
	First Nam	e: Stan					Fax:	222-12	3-2134					Currency:	U.S. Dollar
	Last Nam	e: Mark					Email:							Status:	Received
	External Ref												_		Reason:
	External Ker													ignore:	Reason:
Res	ources Cost	Items													Special Terms & Conditions
	columns here to	group									Saved	d views: Previous V	iew	- p	Buyer's Special Terms & Conditions
urag			Description	No Solit	Free	Awarded	Duratio		Quantity	Unit of Measure	Unit Price	Extended Price	Currency	Default Tax Rate	
	Code 🖮	Quote Group 🚋										\$1,190,000.00			
	Code 🚋	Quote Group 🚋	Asphalt Mix (Finish)					1	35,000.00	Ton	\$34.00		U.S. Dollar		Seller's Special Terms & Conditions
<u>~</u>								1	35,000.00		\$34.00	\$1,190,000.00			sellers special terms & Conditions
<u>~</u>	маам	Asphalt Materials	Asphalt Mix (Finish)					1							
<u>k</u>	маам	Asphalt Materials	Asphalt Mix (Finish)					1							Special Conditions Adjustments:

8.3.12 Duplicating an Existing Quote

You can create a new quote by duplicating an existing quote from the Quote Compare & Award form. Duplicate Quotes will contain the same scope as the quote that you previously copied.

Step by Step — Duplicate an existing Quote

- 1. From the InEight Estimate landing page, select the **Quote** tab.
- 2. Select the **Resources** icon under Quote Comparison & Award.
- 3. Highlight any row under the Quote column you want to duplicate.

Cos	st Breakdown Struct	ure (CBS) Register	Quote Register	Quote Con	parison & Award - I	Resources ©							
Drag	g columns here to group								F	ind: [Search For]	··· Saved views	: Standard View	
	Resource 📃	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Venc Asphalt Mater		Example Vendor 2 Asphalt Materials	Example Vendor 3 Pipe Materials	Example Vendor 4 DBE Pipe Materials	
	MAAM	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	10 🔺	\$31.50	835.70	\$34.13	\$34.1	
	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	10	\$7.25	8 \$7.35	\$8.19	\$8.1	2
÷	MPP 10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28	\$3.28	812.60	\$13.6	3
	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48		\$20.48	\$20.48	\$25.20	🚦 🔗 🛛 \$22.05	5
	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13		\$34.13	\$34.13	831.50	\$32.5	5
		Scope Items											
		Summary											
		Minority Type										😳 DBI	
		Quoted Total				\$1,406,973.75	\$0.00	\$1,171,	100.70	\$1,325,646.00	\$266,616.00	\$271,471.20)
		Comparable Total	<			\$1,406,973.75	\$1,406,973.75	\$1,308	747.30	\$1,463,292.60	\$1,535,943.15	\$1,540,798.3	5

- 4. Select the **Actions** tab.
- 5. Under the Quotes section, select the **Duplicate Quote** icon.

-	Print		y Quote Group	🖗 Set All to F		2			kage Entire Quote		🔒 Lock	Quoted Items	🖽 Zero Items
٩,	Preview	9	All Quote Groups	🖓 Set All to M		Edit Resource	Edit Ouote	nore Quote 🛛 🖉 Edi	t Package	Award And Lock	G Unlock Edit Prices	🔝 Unit Price	Scope Items
ę	Export to Excel	2	VI Quote Items			Edit Resource	East Quote				Edit Prices	Substitute Values	s 😕 Ignored Qui
	Print		Layout	Quote Gro	up Status	Resources			Quites				View
Cos	st Breakdown S	tructu	re (CBS) Regist	er Quot	e Register	Quote Con	nparison & Award -	Resources ©					
Drag	g columns here to	group											
	Resource i	2	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vandor 1 Asphalt Materia	Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
÷	маам		Asphalt Mix (Fini	sh)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	\$31.50	835.70	\$34.13	\$34
	MAFA		Fine Aggregate		1,860.00	Ton	\$7.25	\$8.19	\$8.19	🛊 🔗 🛛 \$7.25	8 \$7.35	\$8.19	\$6
	MPP10		Pipe 10" PVC SDP	R21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	812.60	1 8 \$13
	MPP24		Pipe 24" PVC SDP	R35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	8 \$25.20	1 8 \$22
	MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	831.50	1 832
			Scope Items										
			Summary										
			Minority Type										🙄 C
			Quoted Total					\$1,406,973.75	\$0.00	\$1,171,100.70	\$1,325,646.00	\$266,616.00	\$271,471
			Comparable To	otal <				\$1,406,973.75	\$1,406,973,75	\$1,308,747,30	\$1,463,292,60	\$1,535,943,15	\$1,540,798

- The resources and prices from the quote you previously selected have been copied into a new Quote Record.
- 6. From the Header block, enter in any missing information.
 - The information listed in the Header block will not copy over to the duplicated quote.
- 7. Enter additional Cost Items in the Quote tabs data block.
 - Check the default data blocks for any information you want to add to your duplicate quote.

Cost Breakdown St	ructure (CBS) Register	Quote Register	Quote Cor	mparison & Award - Re	sources	Quote Record	0			
Header									Total	
Description:	Asphalt Materials (Copy)					Optional Code:			Extended Price:	\$1,062,834
Contact:	<ad-hoc address=""></ad-hoc>	6 1	Phone:			Date:		•	Item Taxes:	\$53,141
Company Name:			Mobile:			Source:		•	Quote Tax: Bond:	
First Name:			Fax:			Currency:	U.S. Dollar	•	Item Conditions:	\$0
Last Name:			Email:			Status:	Received		Special Conditions:	
External Ref.:							Reason:			
Diternal Ker.					_	ignore.			Total:	\$1,115,975
Resources Cost It	ems					Minority				:
rag columns here to c	roup Find: Seard	For] ··· Sa	ved views: Pre-	vious View	-	Minority Business Ente				
		Optional				Seller qualifies as	the following type of MINORIT	Y BUSINESS ENTERPRISE o	in this job:	
Code 📐 🛛 R	FQ ID Quote Group	Code	Description	No Split	Free	O DBE DBE Certif	ication:			
<i>→</i>						O MBE MBE Certif	ication:			
						WBE WBE Certif	ication:			
						O OBE1 OBE1 Cert	fication:			
						OBE2 OBE2 Cert	fication			
						OBE3 OBE3 Cert				
						OBE4 OBE4 Cert				
						OBE5 OBE5 Cert	ification:			
						OBE6 OBE6 Cert	ification:			
					[Special Terms & Condi	tions Qualifications Package	s Taxes Seller's Profil	e Setup Minority	

8. Once done, click **OK**.

Exercise 8.1 — Quote Management

When you receive quotes from vendors, you will need to record their pricing and conditions in their InEight Estimate quote records. In this exercise, you will practice entering quote details. Enter the following Quote Record details, using the Training Job:

Quote Name: Aggregates	Seller Name: Example Vendor 2 - Stan Mark	
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$7.45
MDIRTB	Dirt Class B	Not Quoted (delete)
	Special Instructions Seller is NOT willing to spli	t items.
Quote Name: Aggregates	Seller Name: Example Vendor 4 - Lester Slim	
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$8.15
MDIRTB	Dirt Class B	FREE
	Special Instructions Seller is NOT willing to spli	t items.

Resource Code	Description	Unit Price
Quote Name: Aggregates	Seller Name: Example	Vendor 4 - Lester Slim
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$8.15
MDIRTB	Dirt Class B	FREE
Special Instructions	Seller is NOT willing to	split items.

You should end up with the following results

Description	RFQ Description	Seller	Contact Name	Quote Total
Aggregates	Aggregates	Example Vendor 4 DBE Lester Slim	Slim, Lester	\$408,834.56
Aggregates	Aggregates	Example Vendor 2 Stan Mark	Mark, Stan	\$373,719.94
Aggregates	Aggregates	Example Vendor 1 Pat Roberts	Roberts, Pat	\$402,192.00

Congratulations, you have completed this exercise!

8.4 QUOTE COMPARISON & AWARD

Now that you've received quotes and entered pricing information, you will compare them to determine which is the preferred vendor or contractor to carry their pricing in your estimate. The Quote Comparison & Award forms improve visibility into comparative analytics, while increasing efficiencies in populating the estimate with quoted values.

The Quote Comparison & Award screen is designed to closely match the layout of a vendor comparison sheet. It's designed to show all scope items with prices provided by multiple vendors and substitute pricing where items have been excluded.

Now that you've entered contextual quote information in the Quote Register, the Quote Comparison & Award screen provides you with the ability to make better, and more efficient determinations for awarding the quote.

8.4.1 Quote Comparison & Award Overview

To open the Quote Comparison & Award form, select Quote > Quote Comparison & Award.

	Name	Definition
1	Resource and Cost Item Filter	You can show either your quoted resources or cost items.
2	Quote Group Filter	This section provides checkboxes to further filter your items. The Quote Group Filter allows you to mark the quotes as reviewed.
3	Quote Description and Vendor	 Your quotes display with the vendor name plus the quote description. Awarded items have an award symbol I f an item is designated as No Split, it has a chain link icon I have a lock and Locked items have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol I have a lock symbol next to the award symbol next to the award symbol I have a lock symbol next to the award symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol next to t
4	Cost Source Type	The cost source can either be a Plug or Detail type.

Overview – Quote Comparison and Award Form

Address	Quote Group Tags Minority Setup Attachments Setup		Quotes ement		Cost Items	Reports Reports										
Quote Co	omparison & Award - C	ost items 🛛 🕲	Quot	e Register												
Quote G	iroup(s) 2	×	Dr	ag columns here to gr	oup							4				3 Find: [Sea
	Description 🛓 Electrical Work	Reviewed		CBS Position Code	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail		le Sub #2 Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitework
	Guardrail Work			18	Guardrail Type	2	1,000.00	Linear Feet	\$24.00	\$24,000	\$25,000.00	\$50,000.00	10	\$24,000.00	\$25,000.00	\$50,000.00
	Sign Work			19	Guardrail Type	ЗА	200.00	Linear Feet	\$31.00		\$7,000.00	\$7,000.00	10	\$6,200.00	\$6,000.00	\$7,000.00
			-		Scope Items											
			→		Summary											[
					Minority Type											
					Quoted Total						\$32,000.00	\$0.00		\$30,200.00	\$31,000.00	\$50,000.00
					Comparable Tot	al <					\$32,000.00	\$57,000.00		\$30,200.00	\$31,000.00	\$57,000.00

8.4.2 Edit Mode

You can make last minute modifications to the quote price directly in the Quote Comparison and Award form.

When in Edit mode, the quote item's price, unmodified by the quote's bond cost or special conditions, can be updated. You can modify the Unit price or the Extended price for each of the quote items that are not part of the package or marked as Free.

The updates made to quote items in Quote Compare and Award will update the estimate in real time allowing you to see the impact of the changes in the estimate.

uote aro	up(s)	t Dr	ag columns here to grou	Þ							Find:	Search For] …	Saved views: Star	nderd View -
	Description 🕍	Re A	CBS Position Code =	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detai	C&H Concrete Construction, Inc. Conc. de Placement	Khopp Construction Concrete Formwork	Morin Contrete Contractors Concrete Placement	Case Construction Concrete Formwork
	Concrete, Sitework		3.4.1	formwork	1.00	Lump Sum	\$2,317,240.00	\$2,317,240.00	\$3,281,200.00	\$2,525,200.00	\$7,525,10.00	Ø 2525100	\$2,525,200.00	\$2,317,240.00
✓	Concrete, Structural		3.4.2	place and finish	1.00	Lump Sum	\$285,000.00	\$285,000.00	\$375,500.00	\$285,000.00	🚦 🔗 \$285,000.00	\$285,000.00	<i>∂</i> \$294,000.00	\$548,567.00
	Doors & Windows			Scope Items										
	Electrical			Summary										
	Finishes (DIV 9)			Minority Type										
	Fire Protection			Quoted Total					\$3,656,700.00	\$0.00	\$285,000.00	\$2,525,200.00	\$294,000.00	\$2,865,807.00
	Foundations			Comparable Total					\$3,656,700.00	\$2,810,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$2,865,807.00
	HVAC													
	Landscaping Work													
	Masonry													
	Plumbing													
<u> </u>	Rebar Install													
	Scoffolding													
	Sheet Metal													

8.4.3 Substitute Values

You can display a substitute value by selecting Actions > Substitute Values.

Notice the entered quotes. One of the vendors did not give pricing for three of the CBS items.

									Group	gineering ete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	P	\$50,000.00
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	2	\$6,200.00		\$7,000.00		
20	Type 4 Signs	1,000.00	Square F	\$15.00		\$15,000.00	1	\$15,000.00		
27.1	Electrical Work	1.00	Each	\$5,000.00		\$5,000.00	1	\$5,000.00		

When you compare this quote to the others, it can be difficult to see if the total cost of the quote is high or low because it is missing some of the pricing. InEight Estimate can help you make an "apples to apples" comparison by filling in a substitute price for items that are missing.

integrations	Actions							
(,m ²)	💫 Duplicate Quote	🛞 Package Entire Quote	🚆 Award	Lock		Quoted Items	💯 Zero Items	📌 Configure Totals
2	🖉 Ignore Quote	💮 Edit Package	😭 Award And Lock	🔒 Unlock	C	C200 Unit Price	Scope Items	🚹 Set Substitute Ranking
Edit Quote					Edit Prices	Substitute Values	💬 Ignored Quotes	Default Data Blocks
		Quotes					View	

You can tell when it's a substitute value because the price displays in italics.

									HD Engineering Group Concrete, Sitewor	rk
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	⊘ \$50,000	0.00
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	2	\$6,200.00		\$7,000.00	\$7,000	7.00
20	Type 4 Signs	1,000.00	Square F	\$15.00		\$15,000.00	1	\$15,000.00	\$13,000	0.00
27.1	Electrical Work	1.00	Each	\$5,000.00		\$5,000.00	1	\$5,000.00	\$3,500	0.00

InEight Estimate grabs the substitute value from one of four places:

- 1. Awarded splittable quote
- 2. Lowest splittable quote you've received
- 3. Detail (this only applies to quoting cost items)
- 4. Plug cost (the rate defined for that resource in InEight Estimate)

You can set the order for a substitute value by selecting Actions > Set Substitute Ranking.

	Quoted Items	📨 Zero Items	📌 Configure Totals
C	^{C2} ₂₀₀ Unit Price	Scope Items	🚹 Set Substitute Ranking
Edit Prices	Substitute Values	💬 Ignored Quotes	in Default Data Blocks
		View	

On the resulting Substitute Ranking window, you can use the up and down arrows to change the selection order. It will look from the top to the bottom of the list. The plug being in red represents the most risk, while the Awarded Splittable Quote is the least risk. Users can modify the color coding of

these Substitute values by navigating to System Customize dialog and then selecting Substitute Quote Ranking in the colors sections.

9	Substitute Ranking	g X
Lo	varded Splittable Quote west Splittable Quote	
Plu	etail Jg	
	ок	Cancel
	ОК	Cancel

Note that the substitute values are color-coded so that back on the Quote Comparison & Award form you can see the source that your substitute value comes from. When you hover- over a substitute value it displays the vendor whose substitute value has been used.

Example Vendor 1 Pipe Materials for site improvement 2	Architectural Designs, Inc. Electrical Work
♂ P1 \$300,000.00	
\$4,200.00	
	D Engineering Group owest Splittable Quote

When you use a substitute value, it is included in your Comparable Total so you can have a more realistic comparison of your quotes.

Print	🔎 Quote Gro	oups 🤇	💫 Set All	to Rev	/iewed		🖉 Edit	Quote	Lock	👰 Quo	ed Items	Scope	e Items	🔓 Set Subs	titute Ranking	с П) Session	Recap			
🖏 Preview	All Items		🔊 Set All	to Not	Reviewed		🖞 Awa	rd	🔒 Unlock	500 Unit	Price	💬 Ignor	ed Quotes			i	Auto Av	vard +			
Export to Ex	cel					Edit	😭 Awa	rd And Lock	🗇 Edit Pac	kage 👫 Subs	titute Value:	s 📌 Confi	gure Totals			efault a Blocks					
Print	Layout		Quote G	Froup	Status	Cost Items		Quo	tes				Vie	w			Tools	5			
Cost Breakdo	wn Structure (CBS) Regist	er	Requ	lest for Quo	te (RFQ) Regis	ter	Request	for Quote (RF	Q) Record	Quote R	egister	Quote	Comparison 8	& Award - Cost ite	ems ©					
Quote Group	(s)		×	Dra	g columns her	re to group															Find:
	Description 🖮 Electrical Work	Reviewe	ed		CBS Position Cod	de Descrip	tion		<u>.</u>	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast		Plug	Detail		le Sub #2 Rail Items		le Sub #1 Rail Items	HD Engineering Group Concrete, Sitework
	Electrical work 2				18	Guard	rail Type 2	2		1,000.00	Linear	\$24.00	2	\$24,000.00	\$25.00	\$25.00	10	\$24.00	Ø	\$25.00	\$50.00
	Electrical work 3				19	Guard	rail Type 3	A		200.00	Linear	\$31.00	2	\$6,200.00	\$35.00	\$35.00	10	\$31.00	Ø	\$30.00	
✓	Guardrail Work				17	Toll Bo	oth			1.00	Each	\$40,00	2	\$40,000.00	\$25,000.00	\$25,264.55		\$25,264.55	10	\$40,000.00	
	Pipe Materials					Scope	Items														
	Sign Work					Summ	ary														
						Mino	rity Type														
						Quot	ed Total								\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000.00
						Com	oarable Tota	al	<						\$57,000.00	\$57,264.55		\$55,464.55		\$71,000.00	\$82,264.5
						Awa	ded Total								\$0.00	\$0.00		\$30,200.00		\$40,000.00	\$0.00
						Quot	ed Items To	tal							\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000.00
						Spec	ial Condition	IS							\$0.00	\$0.00		\$0.00		\$0.00	\$0.00
				→		Last	Update										7/29	2009 2:21:	11/1	3/2019 9:0	11/13/2019 1:0

8.4.4 Display Ignored Quotes

You can view ignored quotes by selecting **Actions > Ignored Quotes**.

You can ignore a quote by right clicking on the subcontractor header, then selecting Edit Quote.

Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
\$1,311,975.0 \$13,671.0	Award Award And Lock Lock Unlock	1,990.00 6,150.00
5	 Edit Quote Duplicate Quote 	3,331.20
9	 <u>Ignore Quote</u> <u>Package Entire Q</u> <u>Edit Package</u> 	uote
\$1,325,646.0 \$1,463,292.6	Edit <u>R</u> esource	1,471.20 0,798.35

From the Quote Record screen, select the Ignore check box and also a Reason, then select OK.

(Currency:	U.S. Dollar	•	
	Status:	Ignored		
	Ignore:	Reason:	Ŧ	
	Package	26	A Description	Н
	Гаскаус		Do Not Use	Н
	Drag colur	mns here to gr	_c Non Compliant	d:
tend ce	Code	e 📃 🛛 D	e	
	<i>→</i>			П
				Ш
			× .:	:

NOTE If the quote record is already awarded, you will not be able to select the Ignore option.

If the Ignored Quotes button is pressed, the ignored quote will display in grey. An ignored Quote cannot be awarded. The ignored quotes get appended to the right end of the QC&A form.

Award	🔒 Lock		Quoted It	tems 🛛 📨 Zero Iter	ms	∑ ² Configure	Totals	🖓 Se	ssion R	ecap		
칱 Award And L	.ock 🔓 Unio		200 Unit Price	Scope It	ems	🔓 Set Substi	tute Ran	king 🊦 Au	to Awa	rd +		
		Edit Prices	Substitute	e Values 😥 Ignored	Quotes	🛗 Default Da	ata Blocks	5				
				View				1	Tools			
te Compariso	on & Award - C	ost items 🛛										-
					Find:	[Search For]		Stred vie	ws: F	Previous View		•
Unit of Measure	Unit Cost	Total Cost (Forecast)		Detail	Example Sign Ite	e Sub #3 ms		e Sub #2 ail Items	Exam, Sign I	le Sub #4 DBE tems	Example Sub a Guard Rail Iter	
Linear Feet	\$24.00	\$24,000	\$25,000.00	\$25,000.00		\$25,000.00	10	\$24,000.00		\$25,000.00	c? \$25	,000.00
Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00		\$7,000.00	10	\$6,200.00		\$7,000.00	ଚି \$6	,000.00
Square F	\$13.00	\$13,000	\$15,000.00	\$13,000.00	P	\$11,000.00		\$13,000.00	10	\$13,000.00	\$13,	.000.00
												_
						Ø				Ø		
						\$500.00				Ø		
						Ø				Ø		-
									0	DBE		
						D		D		D	B	
			\$47,000.00	\$0.00		\$11,000.00		\$30,200.00		\$13,000.00	\$31,	000.00
			\$47,000.00	\$45,000.00		\$43,000.00		\$43,200.00		\$45,000.00	\$44,	000.00

8.4.5 Additional Quote Comparison and Award functions

The Quote Comparison and Award form contains other notable functions which improves the process of selecting the quote that brings the greatest value to the estimate.

Overview – Additional Quote Comparison and Award Functions

	Name	Definition
1	Asterisk next to Quote Item	An Asterisk (*) is displayed on a quote to indicate when that quote includes quote items appearing in other Quote groups.
2	Zero value Plug/Detail	Award quotes to Plug or Detail when its value is zero.
3	Updated Quote Items Tool tip	 Quote Item Tool tip displays details including: Unit Price Extended Price Bond Taxes Special Conditions an indicator for a delta quote item

Tormwork 1.00 Lump Sum \$2,339,113. \$ \$3,281,200.00 \$6,552,200.00 \$5,558,200.00	
Scope Items Summary	
Summary	\$385,000.00 @ \$294,000.00 \$553,508.49 5
	Unit Price: Say 17, 240. Extended Price: \$2,317
Minority Type	Quote Tax: \$18,537.92
	Bond: \$2,335.78 Special Conditions: \$1,0
Notes	
Quoted Total \$3,656,700.00 \$0.00 \$285,000.00	\$2,525,200.00 \$294,000.00 \$2,892,622.19
Comparable Total < \$3,656,700.00 \$2,525,200.00 \$2,810,200.00	\$2,810,200.00 \$2,819,200.00 \$2,892,622.19

8.4.6 Configure Totals

You can display and sort additional Summary Totals, Special Conditions, and Last Updated fields by selecting **Actions > Configure Tools**.

		Configure To								
	Caption	Visible	Sort							
÷	Seller	✓	None							
	Quote Description	✓	None							
	Minority Type	✓	None	None						
	Notes	~	None	None						
	Extended Price		None	None						
	Item Taxes		None							
	Quote Tax		None							
	Bond		None							
	Item Conditions		None							
	Quoted Items Total		None							
	Special Conditions		None							
	Quoted Total	✓	None							
	Substitute Values		None							
	Comparable Total	✓	Ascending	Ascending						
	Awarded Total		None	None						
	Last Update		None							
	tions ocation: O Top	Bottom								
			ок	Cancel						

The Options radio button give you better control for viewing totals at the tops of the screen or after the quotes.

After selecting additional captions, the new fields appear at the bottom of the Quote Comparison & Award screen. Notice that the caret symbol next to the Comparable totals in the below screenshot indicates that the Quotes are sorted based on Comparable totals in an ascending order.

CBS Position Code 🗎	Description
18	Guardrail Type 2
19	Guardrail Type 3A
20	Type 4 Signs
	Scope Items
	Mobilization
	Survey/Layout
	Temporary Traffic control de
	Summary
	Minority Type
	Notes
	Extended Price
	Item Taxes
	Quote Tax
	Bond
	Item Conditions
	Quoted Items Total
	Special Conditions
	Quoted Total
	Substitute Values
	Comparable Total <
	Awarded Total: \$43,200.00
	Last Update

8.4.7 Adding Notes to Quote Comparison & Award

The Notes feature within the Configure Totals tool, allows you to quickly add, edit, and view notes for a quote in the Quote Comparison & Award form. Having visibility into the notes such as phone conversations with vendor/supplier, quotes that need clarification, or notes on other attributes will help you in making better decisions on who to consider when awarding a particular quote.

Step by Step — Add the Notes section to Quote Comparison & Award form

- 1. From the InEight Estimate landing page, select the **Quote** tab.
- 2. Select the **Resources** icon under Quote Comparison & Award.
 - Notice the absence of the Notes section. This is the default option until you follow the next steps.

- 3. Select the Actions tab.
- 4. From the View section, select the **Configure Totals** icon.

	review	(⊊) A (©) A	y Quote Group Il Quote Groups Il Quote Items Lavout	Set All to R	iot Reviewed	Edit Resource			ackage Entire Quote dit Package Quotes		Lock	Edit Prices	Quoted Items Unit Price Substitute Values		pe Items ored Quotes	Configu Set Sub Configu Configu	stitute Ranking	Session Recap Auto Award -	
Cos			re (CBS) Registe		e Register		nparison & Award -	Resources O	Quotes					VIC	~			TOOIS	
Drag	columns here to g	group												Find:	[Search For] …	Saved views	: Previous View	-
	Resource E		Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor 1 Asphalt Materials	Example Ve Asphalt Ma		Pipe Materials for site	Example V DBE Pipe Mate					
	маам		Asphalt Mix (Finis	sh)	36,750.00	Ton	\$31.50	\$34.13	\$34.1	3 🖁 🔗 🛛 \$31.	0 @	\$35.70	\$34.13		\$34.13				
÷∣	MAFA		Fine Aggregate		1,860.00	Ton	\$7.25	\$8.19	\$8.1	19 🚦 🥜 🛛 💲 🛪 🖇 🖇 🖇 🖇	5 🥜	\$7.35	\$8.19		\$8.19				
	MPP 10		Pipe 10" PVC SDR	821	12,600.00	Linear Feet	\$13.65	\$3.2	\$3.2	8 \$3.	18	\$3.28	\$12.60	18	\$13.65				
	MPP24		Pipe 24" PVC SDR	135	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.4	Ø \$20.	U	\$20.48	\$25.20	18	\$22.05				
	MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	\$32.55	\$34.1	\$34.1	3 \$34.	3	\$34.13	8 \$31.50	18	\$32.55				
			Scope Items																
			Summary																
			Minority Type											0	DBE				
			Quoted Total					\$1,406,973.7	5 \$0.0	o \$1,171,100.	0 \$1,33	25,646.00	\$266,616.00	\$2	71,471.20				
			Comparable To	stal <				\$1,406,973.75	\$1,406,973.7	5 \$1,308,747.	0 \$1,40	53,292.60	\$1,535,943.15	\$1,5	40,798.35				

5. Select the check box in the Visible column for the Notes caption.

-				
5	Caption	Visible	Sort	
-	Seller	✓	None	-
C	Quote Description	✓	None	
N	Minority Type	\checkmark	None	
/	Notes	✓	None	
E	Extended Price		None	
I	Item Taxes		None	
C	Quote Tax		None	
E	Bond		None	
I	Item Conditions		None	
C	Quoted Items Total		None	
S	Special Conditions		None	
C	Quoted Total	\checkmark	None	
S	Substitute Values		None	
C	Comparable Total	\checkmark	Ascending	
A	Awarded Total		None	,

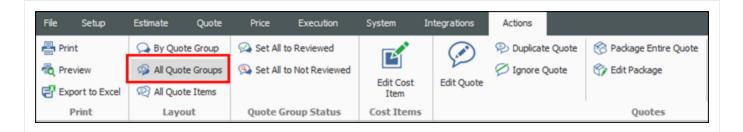
6. Select OK.

• The Notes section displays on the Quote Comparison & Award form.

Starting Listop Unit of Court Unit of Message Unit of Court Unit of Message Unit of Court Unit of Message Page Detail Description Startle Verdor 1 Applit Message																		
Operation Count Maximum Maximum <t< td=""><td>ag columns here to grou</td><td>p</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>Fin</td><td>1: Search hor</td><td>1</td><td>Saved views</td><td>Previous View</td><td>*</td></t<>	ag columns here to grou	p											Fin	1: Search hor	1	Saved views	Previous View	*
VFA Free Apprepate 1,860.00 Tm 47.25 48.19 68.69 1 27.25 0 47.35 68.19 68.19 VID Vip co 10***CSK011 11,460.00 Uncer Feet 413.65 51.32 41.37 41.37 41.37 41.30 65.07 51.45 51.45 51.45 51.45 51.45 51.45 51.45 51.45 51.45 51.45 51.47 61.27 61.27.07 61	Resource ⊨	Description			Unit Cost (Scale 1)	Plug	Detail	Example Asphalt N	Vendor 1 Taterials	Example Vendor 3 Asphalt Materials	-	Pipe Materials for site	DBE					
PUB Ppc SIP RC SER11 12.0000 Unser Feet \$13.45 \$13.38 \$13.37	маам	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	10	\$31.50	A \$35	5.70	\$34.13		\$34.13				
W24 Ppc 24*PrC 52X35 3,000.00 Linese Freet \$22.65 \$20.46 \$20.46 \$20.46 \$20.46 \$22.85 \$22.85 K5 Ppc RC9 36 in 1,004.00 Linese Freet \$32.35 \$34.13 \$54.13 <td>MAFA</td> <td>Fine Aggregate</td> <td>1,860.00</td> <td>Ton</td> <td>\$7.25</td> <td>\$8.19</td> <td>\$8.19</td> <td>10</td> <td>\$7.25</td> <td>8 \$</td> <td>7.35</td> <td>\$8.19</td> <td></td> <td>\$8.19</td> <td></td> <td></td> <td></td> <td></td>	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	10	\$7.25	8 \$	7.35	\$8.19		\$8.19				
R26 Pop RGP 32 in L024.00 Linear Feet \$32.55 \$34.13 £34.23 <	MPP10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28	\$2	3.28	8 \$12.60	:0	\$13.65				
Scope Rens S Some Area S Some	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48		\$20.48	\$20	0.48	825.20	:0	\$22.05				
Summary Montry Type OBE	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13		\$34.13	\$34	4.13	831.50	:0	\$32.55				
Minorty Type		Scope Items																
		Summary																
Notes Image: Constraint of the state of the													0					
Quoted Total \$1,406,973.75 \$0.00 Example Note 6 5.00 \$266,616.00 \$271,471.20					1													
									otel									
Comparable Total \$1,406,973.75 \$1,406,973.75 \$2.60 \$1,535,943.15 \$1,540,798.35		Comparable Total	<			\$1,406,973.75	\$1,406,973.75			2	2.60	\$1,535,943.15	\$,540,798.35				
										v								
									OK	Cancel .								

8.4.8 All Quote Groups Layout

The All Quote Group icon, located within the Quote Comparison and Award ribbon, allows you to see all the quote groups at the same time.



You can make appropriate quote group selections based on understanding how choosing a quote group impacts the entire estimate. In addition, the quote groups layout provides you with the visibility and flexibility in aligning scopes, and being able to perform an efficient comparison of various quotes.

Features of this layout include:

Overview – Quote Groups Layout

	Name	Definition
1	Totals per Quote Group	Ability to see the Awarded Total Plug, Detail and Quote amount per Quote Group
2	Total Awarded Amount	Visibility into the Total Awarded Amount per Quote Group

Overview – Quote Groups Layout (continued)

	Name	Definition
3	Comparable totals	Better visibility into the Comparable totals per Quote Group
4	Expand/Collapse	Expand/Collapse individual or All Quote Groups to display the quote items

_			By Quote Group	8	-	1		ate Quote	😚 Pad	-			5		Quoted It	ems	2 Zero Items
2	Preview	-	All Quote Groups	9	Edit Resource		💋 Ignor	e Quote	🎲 Edit	Package	Te Awar	d And Lock		Prices	Unit Price		Scope Items
ð	Export to Excel	ହ	All Quote Items												Substitute	Values	💬 Ignored Quote
	Print		Layout		Resources				Qu	otes							View
Cos	st Breakdown Str	ruct	ure (CBS) Regist	er	Quote Cor	nparison & Awa	rd - Res	ources C	•								
rag	g columns here to g	roup											F	Find: [Se	arch For]		Saved views:
	Quote Group		<u>=</u>	Plug		Detail		Quote		Quote (Group Total						
>	 Asphalt Materi 	ials	Ì		\$0.00	1	\$0.00	\$1,1	71,100.70		\$1,171,100.70		Ŀ)			
	Resource Code	<u>1</u>	Description			Utilization Count	Unit of Measure		Unit Cost (Scale 1)		Plug	Detail		Example V Asphalt Ma		Exampl Asphalt	le Vendor 2 t Materials
	MAAM		Asphalt Mix (Finish	1)		36,750.00	Ton			\$31.50	\$34.1	\$3 \$3	4.13	10	\$31.50	0	\$35.70
	MAFA		Fine Aggregate			1,860.00	Ton			\$7.25	\$8.1	\$	8.19	10	\$7.25	Ø	\$7.35
			Scope Items														
			Summary														
			Minority Type		_												
			Quoted Total		2						\$1,269,327.1	5 \$ I	0.00	\$1,1	71,100.70	\$	1,325,646.00
1	1		Comparable To								\$1,269,327.1	\$1,269,32	7.15	\$1,1	71,100.70	\$	1,325,646.00
5			Awarded Total:	\$1,17	1,100.70						\$0.0) \$(0.00	\$1,1	71,100.70		\$0.00
I	 Pipe Materials 				\$0.00	1	\$0.00	\$2	71,471.20		\$271,471.20						
	Resource Code	<u>=</u>	Description			Utilization Count	Unit of Measure		Unit Cost (Scale 1)		Plug	Detail		Example V Pipe Mater		Exampl DBE Pipe Ma	le Vendor 4 aterials
	MPP 10		Pipe 10" PVC SDR	21		12,600.00	Linear F	eet		\$13.65	\$3.2	s \$.	3.28	0	\$12.60	10	\$13.65
	MPP24		Pipe 24" PVC SDR	35		3,000.00	Linear F	eet		\$22.05	\$20.4	\$2	0.48	P	\$25.20	10	\$22.05
	MPR.36		Pipe RCP 36 In			1,024.00	Linear F	eet		\$32.55	\$34.1	\$3 \$3	4.13	Ø	\$31.50	10	\$32.55
			Scope Items														
			Summary														
			Minority Type				3										DBE
			Quoted Total								\$137,646.6) \$(0.00	\$2	66,616.00		\$271,471.20
			Comparable To	tal	<						\$137,646.6	\$137,64	6.60	\$2	66,616.00		\$271,471.20
			Awarded Total:	\$271,4	471.20						\$0.0) \$1	0.00		\$0.00		\$271,471.20

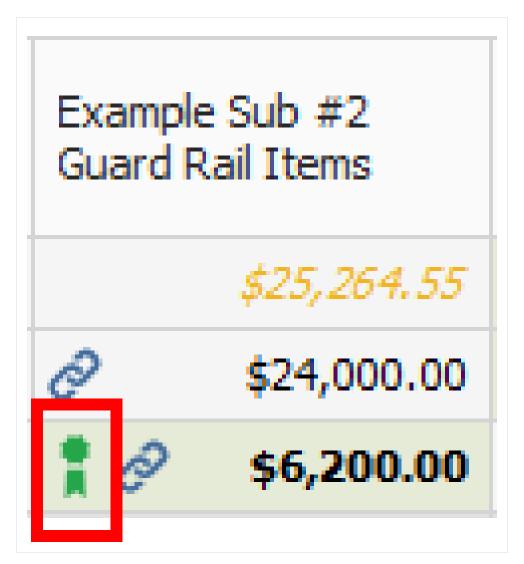
You can scan through all the quote groups in the estimate and see if you are carrying the most appropriate quote. You can also review the Totals per Quote Group and better analyze the risks in the estimate based on whether the cost is a plug number, detailed estimate or a quoted value.

8.4.9 Compare and Award Quotes

To award an item, right click on that item and select Award.

Example Sub #3 Sign Items			le Sub #2 Rail Items	Example Sub #4 DBE Sign Items
\$25,000.00	1	Ø	\$24,000.00	\$25,000.00
\$7,000.00	-	Ø	\$6,200.00	\$7,000.00
	1	A	<u>¢13.000.00</u> ward	• 🗢 ¢13,000.00
ନ୍ଦ୍ର \$500.00 ନ୍ଦ୍ର			ward And Loc ock nlock	k
D	じゅじょ	<u>D</u> <u>Ig</u>	dit <u>Q</u> uote uplicate Quot nore Quote	DBI
\$11,000.00 \$0.00	66 67	E	dit Package	Quote ,000.00 \$0.00
\$0.00	1	E	dit <u>C</u> ost Item	\$0.00

The Award icon displays next to the awarded item(s).



Once you award a quote in InEight Estimate, you can see it adds the Awarded Total on the comparison screen, and the pricing updates automatically in the Cost Breakdown Structure.

CBS Position Code	Description	Forec (T/O) Quan	Unit of Me	Unit Cost	Total Cost (Fore	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items
17	Toll Booth	1.00	Each	\$40,000	\$40,0	\$25,000.00	\$25,264.55	\$25,264.55	🛊 🔗 🛛 \$40,000.00
18	Guardrail Type 2	1,000.00	Linear	\$25.00	₽ \$25,0	\$25,000.00		\$24,000.00	🛊 🔗 🛭 \$25,000.00
19	Guardrail Type 3A	200.00	Linear	\$30.00	₽ \$6,00	\$7,000.00	\$7,000.00	\$6,200.00	\$6,000.00
20	Type 4 Signs	1,000.00	Square	\$15.00	\$15,0	\$15,000.00			
27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000	\$5,000.00			
	Summary								
	Minority Type								
	Quoted Total					\$77,000.00	\$25,264.55	\$30,200.00	\$71,000.00
	Comparable Total	<				\$77,000.00	\$99,764.55	\$72,964.55	\$88,500.00
	Awarded Total					\$20,000.00	\$0.00	\$0.00	\$71,000.00
	Quoted Items Total					\$77,000.00	\$25,264.55	\$30,200.00	\$71,000.00
	Special Conditions					\$0.00	\$0.00	\$0.00	\$0.00
	Last Update							7/29/2009 2:21:	11/13/2019 9:0

NOTE You can award multiple Quote items by selecting all the items and then using the right click context menu to award.

8.4.9.1 Open Status

If a quote is yellow, this indicates that the quote record is open in another screen. Closing out of the quote record, will turn the record back to gray.

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	\$24,000	\$25,000.00		🕴 🔗 🛛 \$24,000.00	\$25,000.00	850,000.0
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	🕴 🔗 🛛 \$6,200.00	\$6,000.00	\$7,000.0
	Scope Items									
	Summary									
	Minority Type									
	Quoted Total					\$32,000.00	\$0.00	\$30,200.00	\$31,000.00	\$50,000.0
	Comparable Total	<				\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000.0

8.4.9.2 Award Status

The Award Status indicates whether or not all quotes are awarded within a quote group.

uote Reg	ister Q	uote Compa	rison	& Award - Cost ite	ms u													
uote Gn	oup(s)	×	Dra	g columns here to gr	oup										Find: [Search For]	Saved vie	ws: Previous View	•
✓ ✓	Descri iii.			CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	.g	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	Example Sub #4 DBE Sign Items	HD Engineering Group Electrical Work	HD Engineering Group Concrete, Sitework	Architectural Designs, Inc. Electrical Work	Example Sub #3 Sign Items
1	Guardrail We	rk		17	Toll Booth		Each	\$40,000.00	\$40,000.00	\$25,000.00	\$25,264.55	\$25, 264.55	\$40,000.00	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.
×	Sign Work			18	Guardrail Type 2	1,000.00	Linear Feet	\$25.00	\$25,000.00	\$25,000.00		\$24,000.00	🔋 🔗 🛛 \$25,000.00	\$50,000.00		\$50,000.00		
				19	Guardrail Type 3A	200.00	Linear Feet	\$30.00	\$6,000.00	\$7,000.00	\$7,000.00	\$6,200.00	📍 🔗 🛛 \$6,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.
				20	Type 4 Signs	1,000.00	Square F	\$15.00	\$15,000.00	\$15,000.00				813,000.00				🔗 Off \$300,000.
				27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000.00	\$5,000.00					\$3,500.00		83,700.00	
			→		Summary													
					Minority Type									DBE				
					Quoted Total					\$77,000.00	\$25,264.55	\$30,200.00	\$71,000.00	\$13,000.00	\$4,450.00	\$50,000.00	\$4,200.00	\$300,000.
					Comparable Total	(\$77.000.00	\$98,764.55	\$71,964.55	\$87,500.00	\$98,764,55	\$98,764,55	\$98,764.55	\$98,964.55	\$385,764.

8.4.9.3 Review

You can keep track of what quote groups have been reviewed by checking the Reviewed check box.



This can be helpful when there are many quotes to track and several users managing them. If any changes are made to quotes within a quote group *after* the quote group is marked as Reviewed, the quote group will be highlighted in yellow to indicate something changed since the last review.

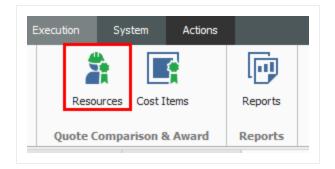
Quote Gro	oup(s)	×
\checkmark	Description 🖮	Reviewed
\checkmark	Electrical Work	
\checkmark	Guardrail Work	\checkmark
 Image: A set of the set of the	Sign Work	✓

Once reviewed again after the changes, you can uncheck and check the Reviewed checkbox again to indicate it is up to date, and the yellow highlighting disappears.

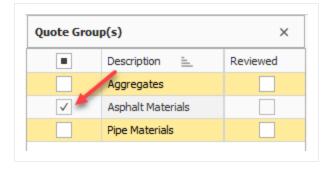
The following steps walk you through comparing and awarding the Aggregate quotes.

Step by Step — Compare and Award Quotes

- 1. Open the **Training job**, and from the main InEight Estimate landing page select **Quote>Quote Comparison & Award**.
- 2. Select **Resources** on the Quote Comparison & Award ribbon.



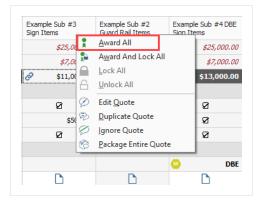
3. Under Description, select Asphalt Materials.



- 4. Review the quotes to determine the lowest bidder:
 - Select the Configure Total icon in the tool ribbon to view additional captions
 - Both vendors have no split items for both resources.

Resource Code	Description		Utiliza Count	
MAAM	Asphalt Mix (Finish)		36,750.00	
MAFA	Fine Aggregate		1,860.00	
	Scope Items			
	Summary			
	Minority Type			
	Quoted Total			
	Comparable Total	<		
	Awarded Total			
	Quoted Items Total			
	Special Conditions			
	Last Update			

5. Example Vendor 1 has the lowest comparable amount, so award all to Vendor 1 by right clicking on the Example Vendor 1 Asphalt Materials and selecting **Award All**.



• By awarding Example Vendor 1 both resources, the award ribbon icon displays next to the unit price.

Detail		ample Ver bhalt Mate		2	ole Vendor lt Materials
\$34.13	1	୬ 😒	31.50	0	\$35.70
\$8.19	1	Q e	Ø	\$7.35	

- You could also change your mind and award Example Vendor 2 one of the resources. In this case, award resource code MAFA to Example Vendor 2.
- 6. Right click on \$7.35 under Example Vendor 2, and select Award.
 - You now have awarded resource code MAFA to Example Vendor 2.

Detail	Example Vendor 1 Asphalt Materials	Example Vendor 2 Asphalt Materials
\$34.13	🚦 🔗 🛛 \$31.50	\$35.70
\$8.19	\$7.25	🔋 🔗 🛛 \$7.35

8.4.10 Package Entire Quote

The Package Entire Quote function allows you to mark an entire quote as a package. This is beneficial if you are attempting to quickly update an existing detailed quote to a lump sum quote from the Quote Record or Quote Compare and Award form.

🖗 Set All to Review 🙊 Set All to Not Re	eviewed Edit Cost Item	()	licate Quote ore Quote	Package Entire Package Entire Package	-		Lock Unlock Edit Prices	Quoted Items Unit Price Substitute Value		Configure Totals	anking 🛊 Auto Award 👻 dks
Quote Group St	nparison & Award - Cost			Quotes					View		Tools
columns here to grou		items u							Find: [Search For	1 ···· Saved via	ews: Previous View -
columns here to grou	lp.								Find: [Jeardi For	J ···· Saved vie	
CBS Position Code 🗎	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Harmon Construction Concrete, Sitework	Eagle Concrete Corp. Concrete, Sitework	Barton Concrete Services, Inc. Concrete, Sitework	C8H Concrete Construction, Inc. Construction, Etimonic
.1.1	Sidewalks	4,544.00	SQFT	\$9.89	\$44,939.07	\$44,939.07	\$44,939.07	@ P1 \$206,000.00	₽1 \$242,500.00	♂ P1 \$217,213.00	Award All
1.1.2	V curb	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	@ P1	Award And Lock All
1.1.3	Curb and Gutter	1,250.00	LF	\$34.51	\$43,133.12	\$43, 133. 12	\$43,133.12	@ P1	@ P1	@ P1	Lock All Unlock All
.1.4	Valley gutter	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	& P1	@ P1	@ P1	Ø
.1.5	Handicap ramps	159.00	SQFT	\$9.89	\$1,572.47	\$1,572.47	\$1,572.47	@ P1	@ P1	@ P1	Belit Quote
1.1.6	Truncated domes	1.00	Lump Sum	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	& P1	@ P1	@ P1	Duplicate Quote
. 1.7	Flow thru planter slab	125.00	LF	\$96.04	\$12,005.46	\$12,005.46	\$12,005.46	& P1	@ P1	& P1	Package Entire Quote
3. 1.8	Flow thru planter walls	125.00	LF	\$95.04	\$12,005.46	\$12,005.46	\$12,005.46	@ P1	@ P1	@ P1	C Package Entire Quote
1.1.9	Median Infil	225.00	CY	\$41.02	\$9,230.60	\$9,230.60	\$9,230.60	@ P1	@ P1	\$9,230.60	\$9,230.60
l. 1. 10	Rolled curb adjacent to	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	& P1	@ P1	\$1,725.32	\$1,725.32
3.1.11	Reinforcing	2,612,40	b	\$4.59	\$12,000.00	\$ \$12,000.00	\$1,306.20	@ P1	@ P1	\$1,306.20	\$1,306,20

8.4.11 Incomplete Quotes

The Incomplete quotes status indicates if a quote includes quote items that do not yet have a price. This is often the case when vendors respond to an RFQ expressing interest in bidding but do not provide their prices until right before the bid is due. These quotes display in gray in the Quote Compare and Award form.

Edit Cost	Duplicate (Dignore Qu Edit Quote		e Entire Quote kage	🚆 Award	odk	Edit Prices	Init Price	Scope Items	onfigure Totals et Substitute Ranking efault Data Blocks	 Session Recap Auto Award +
Cost Items		Qu	iotes					View		Tools
Quote Compa	rison & Award - Cost item	s 0								
columns here to grou	IP						Find:	[Search For] ····	Saved views: Pre	vious View
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Natomas Masonry, Inc. Masonry	Marquis Masonry Masonry	* H.P. Construction Inc. Masonry
4.1.1	CMU Walls	1.00	Lump Sum	\$485,922.27	\$485,922.27	\$400,000.00	\$400,000.00	🔋 🔗 P1 \$512,648.00	\$526,724.53	♂ P1 \$766,352.00
4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$14,577.67	\$14,577.67	\$12,000.00	\$12,000.00	1 @ P1	\$12,375.47	@ P1
4.1.3	Steel Embeds	1.00	Lump Sum	\$12,148.06	\$12,148.06	\$10,000.00	\$10,000.00	🛊 🔗 P1	\$0.00	@ P1
	Scope Items									
	Demolition									
	Caulking, Sealants &									
	Scafolding									2
	Shoring/Bracing							\$15,000.00	\$12,000.00	
	Testing/Inspection									
	Summary									
	Minority Type								🖸 мве	
	Notes							D	D	D

Incomplete Quotes that are Scope Only can be viewed in the Quote Compare and Award form using the **Zero Items** toggle. These are quotes that have none of the Items priced. These quotes are displayed to the right of all the Comparable Quotes.

🕞 By Quote	Group	Set All to Re	viewe	ed 📗	A PAR	(, M ²)	🖗 Duplicate Quote	🔗 Package	Entire Quote	🗍 Award	🔒 Lock	() ()	Quoted Items	🖾 Zero Items 🛛 🗴	Configure Totals	Q Ses	sion Recap
🖗 All Quote	Groups	💊 Set All to Ni	ot Rev	lewed		2	🖉 Ignore Quote	💮 Edit Pad	kage	👫 Award And Lo		200-	Jnit Price	📝 Scope Items 🛛 🔨	Set Substitute Ranking	🛔 Aut	o Award +
2 All Quote	Items				Cost iem	Edit Quote						Edit Prices	Substitute Values	🗩 Ignared Quotes 🛛	Cefault Data Blocks		
Layout	t	Quote Grou	p Stal	tus Cost	Items			Qu	otes					View		т	ools
ost Break	down Struc	ture (CBS) R	eniste	er © Quot	e Compa	arison & Awa	ard - Cost items										
Quote Grou		×	-	columns here to										Find: [Search	For]	d utawa [Previous Vi
			Drag	countris riere u	a group									Find: [Jeard		d views.	FIEW005 /
	Concrete,			CBS Position Code	<u> </u>	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Natomas Masonry, Inc Masonry	* H.P. Construction Inc. Masonry	Marquis M Masonry	
	Concrete,	Sitework		4.1.1		CMU Walls		1.00	Lump Sum	\$1,879,709.33	\$1,879,709.33	\$4,400,000.00	\$1,708,825.67	🕴 🔗 P1 \$512,648.0	10 🔗 P1 \$766,352.00	ð	\$0.0
	Concrete,	Structural		4.1.2		Precast Concr	ete Caps	1.00	Lump Sum	\$170,882.67	\$170,882.67	\$12,000.00	\$12,000.00	🌹 🔗 P1	& P1	2	\$0.0
	Doors & V	indows		4.1.3		Steel Embeds		1.00	Lump Sum	\$170,882.67	\$170,882.67	\$10,000.00	\$10,000.00	🕇 🔗 P1	& P1	Ð	\$0.0
	Electrical					Scope Item	\$										
	Finishes (E	liv 9)				Demolition											
	Fire Prote	tion				Caulking, Se	ealants & Backer Rod										
	Foundatio	ns				Scafelding									2		
	HVAC					Shoring/Bra	icing							\$15,000.	0 🗆		
	Landscapi	ng Work				Testing/Ins	pection								0		
✓	Masonry					Summary											
	Plumbing					Minority Typ	pe									0	MB
	Rebar Ins	all				Notes								D	D		D
	Scaffoldin	,				Quoted Tot	tal					\$4,422,000	\$1,708,826.67	\$512,648.0	\$574,764.00		\$0.0
	Sheet Met	ai	\rightarrow			Comparable	a Total 🛛 🤟					\$4,422,000	\$1,730,826.67	\$512,648.0	\$574,764.00	¢1.	730.826.6

8.5 SCOPE ITEMS

During the bidding process, it's common for subcontractors and suppliers to provide a quote(s) for work during the tail end of the bidding process. These last-minute offers make it extremely difficult for you to evaluate and compare the various quotes and your ability to award them. With **scope items**, you can create and evaluate checklists and quote group exclusions, and account for them within the Quote Comparison and Award form.

You can view scope items as a checklist of items that break down the quote's scope of work into individual tasks to aid in the process of evaluating subcontractor and supplier quotes in greater detail. This can be used to ensure that certain items of work are included or excluded. If excluded, the scope items need to be properly accounted for by contractor awarding the quote.

Overview – Quote Record – Scope Items

Section	Description
Seller's	By default, all scope items are considered included in the quote, and the Special
Special	Conditions amount is \$0.00. On the quote record, by selecting the checkbox, you
Terms &	can indicate scope items and uncheck items that are not included. The amount
Conditions	associated with these items will then total up in the Special Conditions subtotal.
	The person responsible for awarding quotes needs to update the Inclusions field to correspond with what the subcontractor has agreed to include in the quote.

Spec	ial Terms & Cond	itions						×
Quo	te Tax			Item Tax				
Add	Taxes to the Quot	e: 🔵 Yes 💿 No		🗹 Add Ite	m Taxes to ea	ch item's price		
TAX	ES to be added to	awarded TOTAL as a % of tota	:					
		Tax Rate: 🕨 0.0	0					
		Total Tax: \$0.0	0					
Buye	er's Special Terms &	Conditions						
								~
∠ s	eller's Special Term	s & Conditions						
							-	~
Dist	ribute Special Cond	ed to Seller's awarded total (any lition :	ighted average			\$0.00	1	
Drag) columns here to gr	oup			Find: Se	arch For] ····	Saved views:	Previous View -
	Row Number ៉	Scope Item	Quote Grou	qu	Included	Amount	% of Total	Notes
\rightarrow	1	Permits	Electrical W	/ork	\checkmark			4
	2	Surveying and Layout	Electrical W	/ork		\$500.00	14.29	
	3	Temporary Traffic Control Device	es Electrical W	/ork	\checkmark			
	4	Trench and Backfill for Electrical	N Electrical W	/ork	\checkmark			
						\$950.00		
•								,
Specia	al Terms & Condition	s Qualifications Packages	Seller's Profile	Setup M	inority			

	Section	Description
1	Scope Items	Quote Comparison and Award checklist items for your quote that help with evaluating subcontractor and supplier quotes in greater detail. This is used to ensure certain items are either included (inclusion) or excluded (exclusion) in the quote and accounted for by the entity awarding the quote.
2	Scope Item Inclusions	Maintained in Quote Record form. These are the Seller's Special Terms & Conditions scope items that the subcontractor is including in their quote price. When the scope item contains a value, the subcontractor is agreeing to perform the work.
3	Scope Item	Maintained in Quote record form. These are the Seller's Special Terms &

Overview – Quote Comparison and Award – Scope Items

Overview – Quote Comparison and Award – Scope Items (continued)

	Section	Description
	Exclusions	Conditions scope items price. If the Inclusions checkbox is blank, the subcontractor is NOT agreeing to perform the scope items.
4	Scope Item value	An entered value means that the subcontractor is excluding this scope of work. However, you may add an amount because this scope could incur a cost. Once the bid is awarded, you may find another subcontractor to perform the work. You are simply accounting for a cost for this scope of work. In the example below, HD Engineering is not going to paint the electrical equipment, but you know the cost is \$150.00. You are showing this cost to account the cost for this scope of work that needs to happen.
5	Seller's Special Terms & Conditions	By default, all scope items are considered included in the quote, and the Special Conditions amount is \$0.00. On the quote record, by selecting this checkbox, you can indicate scope items and uncheck items that are not included. The amount associated with these items will then total up in the Special Conditions subtotal. The person responsible for awarding quotes needs to update the Inclusions field to correspond with what the subcontractor has agreed to include in the quote.

Cost Break	down Structure (CE	S) Register	Quo	te Register	Quote Comparison & Award	- Cost items	0								
Quote Gro	up(s)	×	Dra	ag columns here to	group										
	Description 🖮	Reviewed		CBS Position Code	Description	<u>.</u>	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail	Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
	Electrical work 2			27.1	Electrical Work		1.00	Each	\$4,200	P	\$4,200.00	\$5,000.00	\$4,200.00	\$4,200.00	\$4,450
	Electrical work 3			6	Scope Items										
	Guardrail Work			U	Permits										2 ²
	Pipe Materials				Surveying and Layout									\$500.00	
	Sign Work				Temporary Traffic Control De	evices									Ø
					Trench and Backfill for Electr	ical Work								3 -	
					Painting Electrical Equipment									•	\$150
					Temporary Power and Lightin	ng									\$300
					Summary										
					Minority Type										
					Quoted Total							\$5,000.00	\$0.00	\$4,200.00	\$4,450
					Comparable Total	<						\$5,000.00	\$4,200.00	\$4,200.00	\$4,450
					Awarded Total							\$0.00	\$0.00	\$4,200.00	\$0.
					Quoted Items Total							\$5,000.00	\$0.00	\$3,700.00	\$3,500
			→	E	Special Conditions							\$0.00	\$0.00	\$500.00	\$950
					Last Update									11/13/2019 1:0	11/13/2019 3:

The example below in the Quote Register form shows quotes from two subcontractors, both with different quote prices. It is important to understand all scope of work the subs are quoting. By just viewing these quotes alone, it's difficult to understand which quote will provide you with the best value. In other words, just because Example Sub #3 is the lowest priced quote, does not mean it is the best quote to go with.

Qu	uote Register 🛛 🕲										
Dra	ag columns here to group										
	Description	ription 🛓 RFQ Description		Quote Status	Seller	Company		Awarded Total	Currency	Awarded	Awarded Status
	Electrical Work		Electrical Work	Accepted	Example Sub #5 MBE Chr	Example Sub #5 MBE	\$4,450.00	\$0.00	U.S. Dollar		None
	Electrical Work		Electrical Work	Accepted	Example Sub #3 Frank M	Example Sub #3	\$4,200.00	\$0.00	U.S. Dollar		None

The example below in Quote Comparison and Award shows that HD Engineering Group is excluding 3 scope items in their quote that totals \$950. This provides a more granular picture for what is being included within each subcontractor's scope of work. It also displays how much each scope of work costs, so you have the option to find another subcontractor to perform this scope work.

e Register	Quote Comparison & Award - Cost item	s O							
columns here to	group								
CBS Position Code	Description 🛓	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)	Plug	Detail	Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
27.1	Electrical Work	1.0	00 Each	\$4,200	\$4,200.00	\$5,000.00	\$4,200.00	🚦 🔗 🛛 \$4,200.00	\$4,450.0
	Scope Items								
	Permits								Ø
	Surveying and Layout							\$500.00	\$500.00
	Temporary Traffic Control Devices								Ø
	Trench and Backfill for Electrical Work								Ø
	Painting Electrical Equipment								\$150.00
	Temporary Power and Lighting								\$300.00
	Summary								
	Minority Type								
	Quoted Total					\$5,000.00	\$0.00	\$4,200.00	\$4,450.00
	Comparable Total	<				\$5,000.00	\$4,200.00	\$4,200.00	\$4,450.00
	Awarded Total					\$0.00	\$0.00	\$4,200.00	\$0.00
	Quoted Items Total					\$5,000.00	\$0.00	\$3,700.00	\$3,500.00
	Special Conditions					\$0.00	\$0.00	\$500.00	\$950.00
	Last Update							11/13/2019 1:0	11/13/2019 3:5

Utilizing Scope Items enables you to more effectively compare quotes from subcontractors and suppliers by providing a deeper comparison of quotes. Moreover, it provides clearer visibility of what a proposal may or may not be including at the time you are attempting to make an award.

You can make a more informed decision on whom to award the quote to, now that the vendor quotes and associated scope items are all visible on one screen.

8.5.1 Scope Item Setup

Scope items are stored within each quote group tag in the Foundation Setup Data form. On each Quote Group Tag Record, you can list out scope items that break down the work into smaller scopes of work, along with the estimated cost amount associated with each scope item.

	dation Setup [Jata Register	Quote Group Tag R	ecord Ø		
Description: * Electrical Wo Award Status: Complete			Work			
	Review	ed:				
	Last Review	ed:				
01	Jote Last Chang	ed:				
~ ~						
	g columns here to					
				Amoun	t	% of Total
	g columns here to	o group		Amoun	t \$0.00	% of Total
	g columns here to Row =	o group Scope Item Permits	yout		-	% of Total
	g columns here to Row =1	o group Scope Item Permits		•	\$0.00	% of Total
	g columns here to Nu = 1 2	o group Scope Item Permits Surveying and Lay Temporary Traffic		 • • • 	\$0.00 \$500.00	% of Total
	g columns here to Nu = 1 2 3	o group Scope Item Permits Surveying and Lay Temporary Traffic Trench and Backfil	Control Devices Il for Electrical Work		\$0.00 \$500.00 \$0.00	% of Total
	g columns here to Nu = 1 2 3 4	o group Scope Item Permits Surveying and Lay Temporary Traffic Trench and Backfil Painting Electrical Temporary Power	Control Devices Il for Electrical Work Equipment	> > > > > >	\$0.00 \$500.00 \$0.00 \$0.00	% of Total

8.5.2 Scope Item Creation and Award

The following Step by Step assumes you are putting out an advertisement for bids for some electrical work on a project. You will add scope items with some fixed costs as a special condition, then will compare quotes in order to decide which vendor quote is the best deal.

Step by Step — Create and Award Scope Items

- 1. Open the **Training Job**.
- 2. Select the Setup tab.
- 3. Click on Foundation Data Setup in the Initialize section.
- 4. Select the **Quote Group Tags** tab to setup Scope Items within a Quote Group.
- 5. Create a new Quote Group Tag called Electrical Work and click OK.

Account Cod	les Tags	Work Break	down Structures	Quote Group Tags
Account Cot	ica lluga	WORK DI COM	down 5d detares	Quote Group Taga
Drag columns	here to group			
Descript	tion	<u>=</u>	Award Status	Utilized In Quotes
+ Agg	regates		Complete	\checkmark
+ Aspl	halt Materials		Complete	✓
+ Bridg	ge Work		Complete	
+ Com	mercial Work		Complete	
+ Con	crete Beams		Complete	

- 6. Open Electrical Work and add the following Scope Items:
 - Permits
 - Surveying and Layout
 - Temporary Traffic Control Devices
 - Trench and Backfill for Electrical Work
 - Painting Electrical Equipment
 - Temporary Power and Lighting
- 7. Enter **500** in the Amount field for Survey and Layout, and **300** for Temporary Power and Lighting.
 - If any of these default columns are missing, click on one of the headers, and right click. Select **Column Chooser** and drag the item(s)over tto the header bar, then click **OK**

Row Number 🗎	Scope Item	Amount	% of Total
1	Permits	\$0.00	
2	Surveying and Layout	\$500.00	
3	Temporary Traffic Control Devices	\$0.00	
4	Trench and Backfill for Electrical Work	\$0.00	
5	Painting Electrical Equipment	\$0.00	
6	Temporary Power and Lighting	\$300.00	

- 8. Click **OK**.
- 9. Select the **Estimate** tab.
- 10. Click on Cost Breakdown Structure (CBS).
- 11. Change your Saved Views to **Quote Group Setup View**.
- 12. Create a cost item **Entry Gate** with a subordinate **Electrical Work**.
- 13. Assign **Quote Group Electrical Work** to the Electrical Work cost item.

CBS Position Code 🗎 🕇	Description	Forecast (T/O) Quantity
2 6	Entry Gate	1.00
+ 26.1	Electrical Work	1.00

- 14. Select the **Quote** tab.
- 15. Click **Request For Quote (RFQ)** to open the RFQ Register.
- 16. Create an RFQ for the Electrical Work cost item by selecting the **New** icon on the Actions tab.
- 17. Select Create RFQ from Quote Group Tag(s) and select Electrical Work.

Cost Item Identification Use the following field: CBS Position Code Please select from the following options: O Create RFQ from scratch O Create RFQ from Quote Group Tag(s)	
 Only show Quote Group tags that are currently utilized in this job On the resulting RFQ record, only list resources with utilization currently greater than zero Create RFQs using Default Seller data This option scans the job for all Resources and Quote Groups utilized in the job. For any that are listed in the Address Book as 'Default Quotes' for the Sellers you select on the subsequent selection register, a new RFQ record will be added for each Seller listing their default items. 	Aspnait Materials Commercial Work Concrete Materials Guardrail Work Landscaping Work Manhole Materials None Painting Materials Pipe Materials Process Equipment Install Process Materials Sign Work Structural Painting ✓ Electrical Work
Create separate RFQ records for each Quote Group, per seller?	Cancel

- 18. Click **OK**.
- 19. Click on the Seller Companies tab and select the following Company Names:

- Architectural Designs
- HD Engineering Group
- 20. Highlight both companies and select Publish.
 - Make sure the appropriate boxes are checked and fields filled out for publishing either by fax or by email prior to publishing

📄 Publish 💬 Create Que	ote			
Process				
Foundation S	etup Data Register		Quote Grou	p Tag Record
Description				
Electrical Wo	ork			
Response D	eadline Date: 1/2/20	19	•	Response De
Line Items	Terms & Conditions	Sell	er Companies	Attachment
-	here to group			
Compan Name	Ŋ	<u> </u>	First Name	Last Name
Archited	tural Designs, Inc Jo	nes	. Jones	Hardy
→ HD Engi	neering Group Roger	C	\rm Roger	Croon
*				

21. Assuming that you've already received quotes back from both companies, create a Quote from this RFQ for both companies by selecting the companies and selecting **Create Quote**.

Publish Create Quote		
Process	1 D	0.1.5.7
Foundation Setup Da	ata Register	Quote Group Tag
Description	RFQ 'Electri	cal Work' X
Electrical Work		
	Quote(s) cro	eated: 2
	- [ОК
Response Deadline I	Data: 1/2/2010	Respo

- 22. Click **OK** to close the RFQ record.
- 23. Select the **Quote >Quotes** tab to open the Quote Register.
 - Note the 2 quotes that were just created for Electric Work

Description	<u>=</u>	RFQ Description	Quote Status	Seller
[Enter Description]			Invalid	<ad-hoc address=""></ad-hoc>
[Enter Description]			Invalid	<ad-hoc address=""></ad-hoc>
Aggregates		Aggregates	Received	Example Vendor 1 P
Aggregates		Aggregates	Received	Example Vendor 4 DBE
Aggregates		Aggregates	Received	Example Vendor 2 S
Asphalt Materials			Received	Example Vendor 1 Pa
Asphalt Materials			Received	Example Vendor 2 S
Concrete, Sitework			Ignored	HD Engineering Group
Electrical Work		Electrical Work	Received	Architectural Designs,
Electrical Work		Electrical Work	Received	HD Engineering Group

24. Open the Quote Record for HD Engineering Group and enter a Unit Price of **3,500**, which is based on the quote you received.

- 25. Select the **Special Terms & Conditions** tab and select the **Seller's Special Terms & Conditions** radio button.
 - You now have visibility for all of scope items for this quote

Row Number 📒	Scope Item	Quote Group 🛓	Inclusions	Amount	% of Total
1	Permits	Electrical Work	\checkmark		
2	Surveying and Layout	Electrical Work	\checkmark		
3	Temporary Traffic Cont	Electrical Work	\checkmark		
4	Trench and Backfill for E	Electrical Work	\checkmark		
5	Painting Electrical Equip	Electrical Work	\checkmark		
6	Temporary Power and L	Electrical Work	\checkmark		

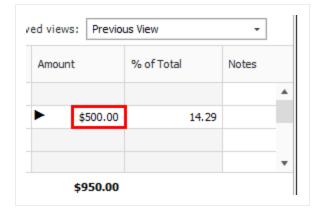
- 26. Assuming HD Engineering is excluding certain scope items from this quote, click on the **Included checkbox** to exclude (uncheck) the following scope items:
 - Surveying and Layout
 - Painting Electrical Equipment
 - Temporary Power and Lighting

ra	g columns here to g	jroup	Find: [Se	arch For]	··· Saved views: Previous View	-
	Row Number 🗎	Scope Item	Quote Group	Included	Notes	
	1	Permits	Electrical Work	\checkmark		
÷	2	Surveying and Layout	Electrical Work			
	3	Temporary Traffic Contr	Electrical Work	~		

- 27. Type **150** in the Amount field for Painting Electrical Equipment.
 - Notice how the 3 scope items you just excluded are now added to the Special Conditions total for the quote

Total:	\$4,450.00
Special Conditions:	\$950.00
Item Conditions:	\$0.00
Bond:	
Quote Tax:	
Item Taxes:	\$0.00
Extended Price:	\$3,500.00
otal	

- 28. Click **NEXT** to move to the other Quote Record for Architectural Designs.
- 29. Enter a Unit Price of **3,700**.
- 30. Press **Tab** to move to the **Special Terms & Conditions** tab and select the **Seller's Special terms & Conditions (at right)** radio button.
- 31. Uncheck the Inclusions checkbox for Surveying and Layout
- 32. Add the amount 500.



- 33. Click OK.
- 34. Select the **Quote** tab.
- 35. Open the Quote Comparison and Award form, and select the Cost Items tab.
- 36. Under Quote Groups, select Electrical Work.

Quote Grou	p(s)	×
	Description 🚊	Reviewed
\checkmark	Electrical Work	
	Guardrail Work	
	Sign Work	

- You will notice that scope items with inclusions and exclusions on the quotes are now displayed in the Scope Items section. The Scope Items button needs to be pressed in the View section of the screen
- The total of all exclusions are now added to the Special Conditions section for each subcontractor

5,000.00 \$0.00 \$0.00
5,000.00 \$0.00 \$3,700.00 \$3,500.00

TIP

If your Special Conditions row is missing, click the Substitute Values icon on the Action tab. You can also rearrange the sequence as desired.

g

- Most importantly, this comparison including scope items makes it clear HD Engineering Group has provided a quote of \$4,450, while Architectural Design's quote is \$4,200
- 37. Right click on the quoted amount for Architectural Design and select **Award** to award the work to Architectural Design.

Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
\$3,70	Award
ମ \$50 ମ ମ ମ ମ ମ ନ ନ ନ ନ ନ ନ ନ ନ ନ ନ ନ ନ ନ ନ	A <u>w</u> ard And Lock Lock Unlock Edit Quote Edit Cost Item Edit Package \$300.00
\$4,200.00	\$4,450.00
\$3,700.00 \$0.00	\$4,450.00 \$0.00
\$3,700.00	

38. Click **Yes**, on the resulting prompt to mark the quote group as reviewed.

• The Architectural Design's quote is now awarded

Detail	Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
\$4,200.00	🚦 🔗 🛛 \$4,200.00	\$4,450.00
	Ø	Ø
	\$500.00	\$500.00
	Ø	Ø
	Ø	Ø
	Ø	\$150.00
	Ø	\$300.00
\$0.00	\$4,200.00	\$4,450.00
\$4,200.00	\$4,200.00	\$4,450.00
\$0.00	\$4,200.00	\$0.00
\$0.00	\$3,700.00	\$3,500.00
\$0.00	\$500.00	\$950.00
	11/13/2019 1:0	11/13/2019 2:: 🛒
	11/13/2019 1:0	11/13/2019 2:

8.6 QUOTE ITEM ADJUSTMENT

Quote items can be adjusted even after a quote has been awarded. This could happen on closing day when a vendor sends in a last minute discount. For example, vendor 3 has sent in a 10% discount on piping materials. This percentage discount is applied to the vendor 3 quote by entering the 10% in the Condition Adjustment column.

Step by Step — Quote Item Adjustment

- 1. From the Ribbon, select the **Quote** tab.
- 2. Under the Quote Comparison and Award section, select **Resources**.

- 3. Locate the Example Vendor 3 column.
- 4. Select the quote you want to edit under the Example Vendor 3 column. In the Ribbon, select the **Actions** tab.
- 5. Under the Quotes section, select **Edit Quote**. You can also right-click and select **Edit Quote**. This launches the Quote Record.

Resource Code	Description	Detail	Example V Pipe Mater		Example V DBE Pipe Mater	
MPR36	Pipe RCP 36 In	\$34.13	e	\$31.50	10	\$32.55
MPP24	Pipe 24" PVC SDR35	\$20.48	0	*25 20	0.0	433 AF
MPP 10	Pipe 10" PVC SDR21	\$3.28	0		<u>A</u> ward	
	Scope Items				I And Lock	
	Summary			Lock	k	
	Minority Type			_		
	Quoted Total	\$0.00	4	🧭 Edit <u>O</u>		
	Comparable Total <	\$137,646.60	S		ate Quote	
	Awarded Total: \$271,	\$0.00			Quote	
	Quoted Items Total	\$0.00	5		ge Entire Q	uote
	Special Conditions	\$0.00		😚 Edit Pa	ackage	
	Last Update		7/14/2	🤛 Edit <u>R</u> e	esource	

6. You can make Condition Adjustments by a percentage or an amount. Select the field to adjust the percentage or amount of the **Condition Adjustments**.

F	ind: [Search For]	Save	d views: Previous	View	•
Tax Rate	Condition Adjustment Percentage		Condition Adjustme Amount	nt	Total Price
5.00		-10.00	\rightarrow	(\$14,400.00)	\$136,800.0
5.00		0.00		\$0.00	\$75,600.0
5.00		0.00		\$0.00	\$32,256.0

NOTE If you enter a percentage, the amount is populated based on that calculation. This is the same for entering a Condition Adjustment Amount.

7. Items adjustments can be applied individually or by using the multi-edit function. Select multiple resources in the Quote Record, then right-click and select **Open**. This opens the **Quote Resource Item Record**.

Re	sources	Cost	Items				
Drag	Drag columns here to group						
	Code	<u>1</u>	ration		Qu	antity	Unit of Measure
⇙	MPP 10)		1		12,000.00	Linear Feet
	MPP24	ŧ		1		3,000.00	Linear Feet
→	MPR36	5		1		1,024.00	Linear Feet
*							
		<u>O</u> pen					
	8	<u>D</u> elete					
	8	Cu <u>t</u>					
	9	Сору					
	Ē.	<u>P</u> aste					
	+	<u>F</u> ill Dov	vn				
	8	Link th	ese field	s to	Exc	el	
		<u>U</u> nLink	from Ex	cel			

8. As you populate the 10% discount adjustment to all of the items selected using the multi-edit tool, the amount value changes to **Varies**. This is because of the variance in the unit rates for each selected item.

aries				
em .				
Line Number	Code	Quantity	Unit of Meas	ure
aries	Varies	Varies	Linear Feet	*
gs Quote Group	Tag 1	Tag 2	Tag 3	
ipe Materials	Varies -	Varies -	Tag 5	
Setup	— -	Condition Adjustment Amount:	· · · · · · · · · · · · · · · · · · ·	Varies
🗹 No Split	Free Free	Percentage:		-10.00
		Percentage:		
✓ No Split Plug Unit Price:	Varies			Varies
		Price		
Plug Unit Price:	Varies	Price Unit Price:		Varies

9. Select **OK** to save the changes to the line items in the Quote record and to save the Quote.

Lesson 8 Review

- 1. When you receive responses to your RFQ, the next step is to enter their pricing in the
 - a. CBS Register
 - b. PBS
 - C. Quote Register
 - d. RFQ Register
- 2. On a Quote Record, No Split means
 - a. The quote must be combined with other quotes from the same vendor
 - b. All items on the quote must be purchased from that seller
 - C. You can't split the quote into multiple quotes
- 3. When a quote group is highlighted in yellow on the Quote Comparison & Award form, it signifies that
 - a. The quote group has changed since it was last marked as Reviewed
 - b. No quotes have been awarded for that quote group
 - c. There are some quotes in the quote group that contain substitute values

Lesson 8 Summary

As a result of this lesson, you can:

- Create and publish RFQs
- Define quote pricing
- Compare and award quotes
- Create and analyze scope items

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LESSON 9 – REPORTING

Lesson Duration: 30 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Run reports from the Reports menu
- Create and run reports from register forms

Lesson Topics

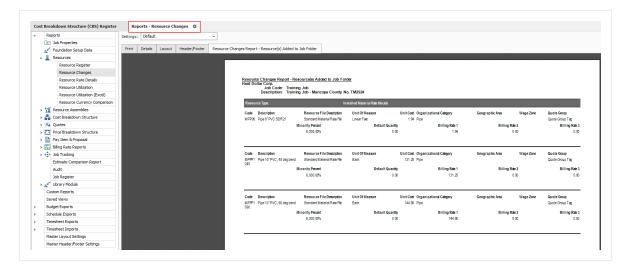
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9.1 REPORTS MENU

InEight Estimate provides a lot of out of the box reports, referred to as "canned" or "system" reports, that can help you review and analyze your estimate.

9.1.1 Non-Modal Report dialog box

The Reports dialog is docked along with the other forms and registers. You can continue to work with your estimate without being forced to close the Reports dialog box.



If the report becomes undocked, the job code shows in the reports dialog box header.

9.1.2 Adjustable Reports

Most of the reports within InEight Estimate can be adjusted to output the specific data and reporting format you need. Each report has its own set of output settings for configuring and formatting the report.

All InEight Estimate adjustable reports are accessed from the Reports menu. You may even run the same report multiple times and choose different output settings based on what you want to see or who the intended audience is.

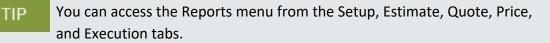
For example, you may choose to run the CBS Details Report several times to satisfy different needs or for different audiences, and include or exclude specific data depending on what you or the report recipients want to see.

- For a group of *estimators*, you may want to run a CBS Details Report that shows all cost and productivity data for a job
- For *field personnel,* you may want to run a CBS Details Report that shows no cost data, but all production and resource data
- Finally, for *executive management*, you may want to run a CBS Details Report that shows summary level information only

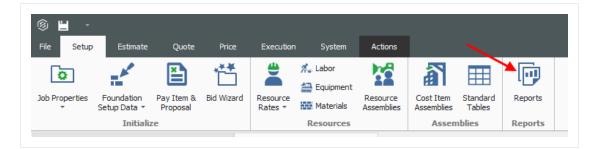
The following steps take you through a brief overview of the Reports menu and how you can access it.

Step by Step — Get to Know the Reports Menu

- 1. Open the Training Job, and select Setup tab.
 - You access the Reports menu by clicking on the Reports icon



2. Select **Reports**.



3. Here you select the Report of your choice. For this example, select the first option, **Job Properties**.

•		
✓ Re	ports Job Properties	Setti
- <u>-</u>	Foundation Setup Data Resources	Print
	Resource Register	OP
	Resource Changes	Drin
	Resource Rate Details	
	Resource Utilization	P
	Recourse Litilization (Evcol)	

- You will see a split screen with the reports available on the left side bar
- The side bar on the left of the Reports form contains a "tree" of all InEight Estimate adjustable reports

•				Reports - Job P		
ſ		Re	ports	Settings: Default		
L		o	Job Properties	Settings: Default -		
L	<u>ہ</u>	*	 Foundation Setup Data 	Print Details Layout Header/Footer		
•			Resources			
L			Resource Register Resource Changes	O Print to Printer		
L				0		
L			Resource Rate Details	Print Settings		
L			Resource Utilization	Printer: Adobe PDF		
L			Resource Utilization (Excel)			
L			Resource Currency Comparison			
	> 😭 Resource Assemblies		Resource Assemblies			
	>	съ (Cost Breakdown Structure			
	>	9	Quotes			
	>	-	Price Breakdown Structure	○ Export to File		
	>		Pay Item & Proposal	– Export Settings		
	>		Billing Rate Reports			
	>	Ð	Job Tracking	File:		

• On the right, when you select a report node on the left, note that it displays the Output Settings on the right side of the form, from which the report settings can be adjusted and the report can then be run

Reports	Settings: Default
Job Properties	Settings: Default -
Foundation Setup Data	Print Details Layout Header/Footer
Resources	
Resource Register	O Print to Printer
Resource Changes	- Print Settings
Resource Rate Details	
Resource Utilization	Printer: Adobe PDF Change
Resource Utilization (Excel)	
Resource Currency Comparison	
Resource Assemblies	
Cost Breakdown Structure	
🔍 Quotes	
Price Breakdown Structure	O Export to File
Pay Item & Proposal	Export Settings
Billing Rate Reports	
Job Tracking	File:
Estimate Comparison Report	Format: PDF File V Options
Audit	
Job Register	

4. Each report has a Print tab, a Layout tab and a Header/ Footer tab specific to that report.

Setting	s: Defau	lt		Ŧ
Print	Details	Layout	Header/Footer	
	it to Printer			

• There are also Master Layout Settings and Master Header/Footer Settings located at the bottom of the left-hand side bar tree. Here you can define settings that will apply to all

reports

	Estimate Comparison Report	Format: PDF File V Options
	Audit	
	Job Register	
>	💒 Library Module	
	Custom Reports	
	Saved Views	
	Budget Exports	Preview
	Schedule Exports	
	Timesheet Exports	
	Timesheet Imports	
	Master Layout Settings	
	Master Header/Footer Settings	

9.1.3 Output Settings

This section provides a more detailed explanation of the output setting tabs.

9.1.3.1 Report Printing Options

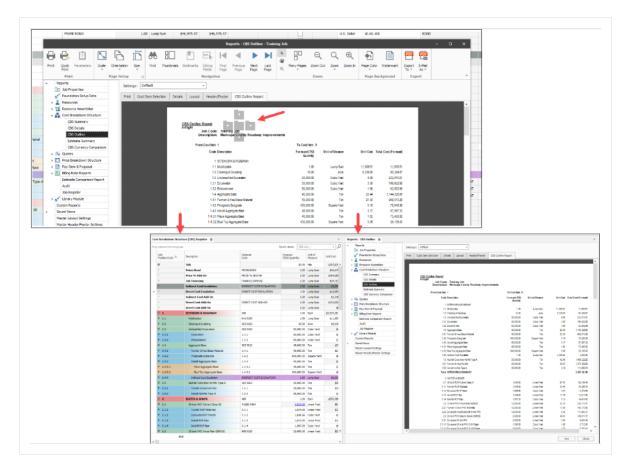
The Print tab includes three options for printing output: Print to Printer, Export to File, and Preview. Export file outputs include PDF, Excel, text, and more.

Print Preview

The Reports print previews opens in its own tab in the Report Dialog. This lets you keep the report open while continuing to use other parts of the application.

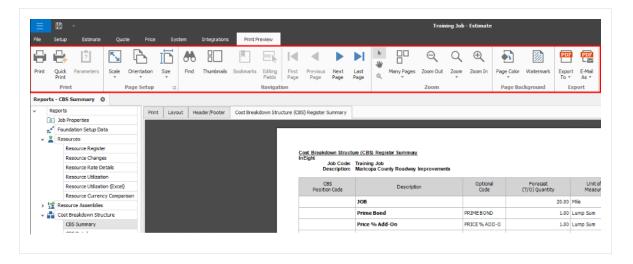
	ports	Print De	tals Layout	Header/Footer	Resource Asse	embly Register Summ	ary								
	Job Properties														
× 11						Resource Asser	nbly Register Summary								
						Job	Codes Training Job								
						Desc	ription: Maricopa County Roadway Im	provements							
						Code	Constraintion	Resource	Quantity	Unit of	Unit Cost	Total Cost	Currency	Organizational	Geogra
							occorption,	File Description	decoursed.	Measure	Const Const	1010-003	currency	Category	Area
	CBS Details					CCONC	Concrete Crew	Standard Assembly Fi	1.00	Hour	\$375.03	\$375.03	U.S. Dollar	Concrete	
	CBS Outine					CGRADE	Grading Crew	Standard Assembly FI	1.00	Hour	\$234.73	\$234.73	U.S.Dollar	Earthwork	
	Estimate Summary					CMAINT	Equipment Maintenance	Standard Assembly FI	1.00	Each	\$23.00	\$23.00	U.S.Dollar	Mechanic	
	CBS Currency Comparison					CPAVE	Paving Crew	Standard Assembly FI	1.00	Hour	\$476.24	\$476.24	U.S.Dollar	Asphak	
> 强	Quotes					CRIPE	Pine Crew	Standard Assembly FI	1.00	Hour	\$343.54	6343.54	U.S.Dollar	Pine	
> 🖂	Price Breakdown Structure									Each	\$410.82		U.S.Dollar	Category Area Concrete Earthwork Mechanic	
- 🗎	Pay Item & Proposal														
	Standard Proposal							Standard Assembly FI		Hour	\$1,111.21	\$1,111.21			
						CTRUCK	Truck Excavate-Load-Haul Crev	Standard Assembly Fil	1.00	Hour	\$618.72	\$618.72	U.S.Dollar	Earthwork	
						CWELD	Welding Crew	Standard Assembly N	1.00	Each	\$248.64	\$248.54	U.S.Dollar	Welder	
						MASPH	Asphalt Material Assembly (with yiel	Standard Assembly Fil	1.00	Ton	\$29.45	\$29,45	U.S.Dollar	Asphalt	
_						MEORM	Concrete Forming Assembly	Standard Assembly Fil	1.00	Square Feet	\$28.88	\$28.88	U.S.Dollar	Concrete	
> 📰						008	DozerD8-Operated	Standard Assembly Fil	1.00	How	\$204.22	\$204.22	U.S. Dollar	Farthwork	
								Standard Assembly Fi		Hour	\$90.82		U.S. Dollar		
								Standard Assembly FI	1.00	Hour	\$157.62	\$157.62	U.S.Dollar	Earthwork	_
	CdB Codesis CGBACE Crading Crew CdB Codewing CGBACE Crading Crew Estimated Summary CRADIT Estimated C Codesis CRADIT Estimated C Parting Creation CRADIT Estimated C Parting Assembly (stB matted) CRADIT Estimated C Parting Assembly (stB matted) CRADIT Estimated C Parting Assembly (stB matted) CRADIT Estimated Part Data Structure CRADIT CRADIT Part Data Structure CRADIT CRADIT														

You can also undock and float a report on a different form, or you can tile it side by side with another register to view and compare them.



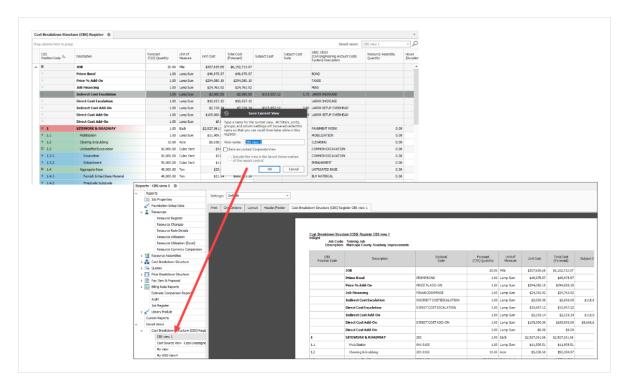
Print Preview Ribbon

The Print Preview menu is displayed on its own ribbon. Menu commands are shown in the ribbon as a contextual Print Preview menu when navigating to Reports > Print > Preview > **Run**.

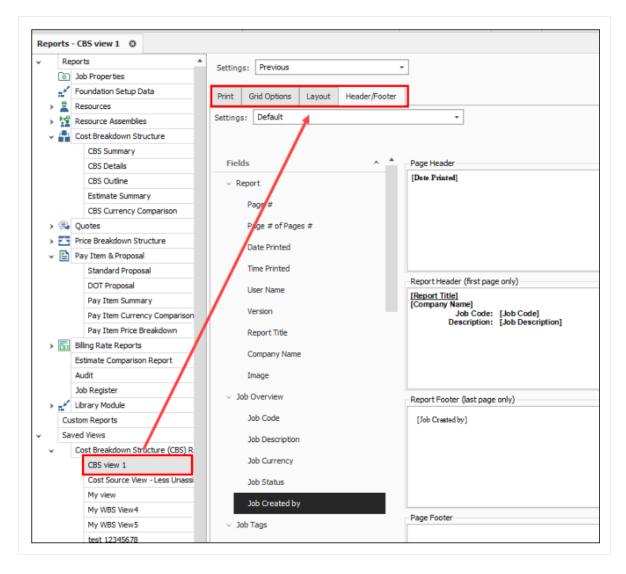


9.1.3.2 Apply custom Layouts and Headers/Footers to register reports

You can apply custom Layouts and header/footers to register based reports. Upon saving a view in any register, select the option to save it as a corporate view and include the view in the reports dialog box.



When selecting a Saved View from the Reports register you can use the Print tab to customize the printing preferences, use the Grid Options tab to change the font type/size, use the Layout tab to modify the design style, and use the Header/Footer tab to insert a header and footer to your report.



When you click on the Run button it will create a new register-style report. You can modify the layout or header/footer directly in this register. You can also toggle between any of the four other tabs to make modifications and see the changes on the saved view report.

R	eports	* Settings: Pret	vious						
ō	Job Properties	Setungs: Pre-	nous						
	Foundation Setup Data	Print Grid Op	tions Layout	Header/Footer	Cost Breakd	lown Structure (CBS) Reg	ister CBS view 1		
> 🚊	Resources								
> ₩	Resource Assemblies								
~ •	Cost Breakdown Structure					6/16/2022			
	CBS Summary							000	
	CBS Details					Cost Breakdown Struct InEight		CBS VIEW 1	
	CBS Outline					Job Code: Description:	Training Job Maricopa County	Roadway Improvements	
	Estimate Summary								
	CBS Currency Comparison					CBS		Description	Option
> 📃	Quotes					Position Code		Description	Code
> 🔼	Price Breakdown Structure						JOB		
✓	Pay Item & Proposal								0000000
	Standard Proposal						Prime Bond		PRIMEBOND
	DOT Proposal						Price % Add-Or		PRICE % ADD-ON

9.1.3.3 Report Layout Settings

Many of the InEight Estimate adjustable reports include formatting options for the general layout of the report, located under the Layout tab of the report's output settings. Settings for the report include: Orientation, Margins, Font, and Number Format.

Print Details	Layout Header/Footer				
Orientation Portrait Landscape	It (Letter)	•	Margins Left: 0.50	Top: 0.50 💽	Header: 0.25 + Right: 0.50 +
Font Header Level 1:	Arial Narrow, 8, Bold	•••	-Number Format -	Bottom: 0.50 🔶 Decimal Precision	Footer: 0.25 🜩 Significant Figures
Detail Level 1: Header Level 2:	Arial Narrow, 8, Regular Arial Narrow, 8, Bold		Cost summary: Unit cost:	2	
Detail Level 2:	Arial Narrow, 8, Regular	•••			

9.1.3.4 Report Header/Footer Settings

Many of the InEight Estimate adjustable reports include the option to define and insert headers and footers into the report. You can add information to the left, middle, or right of the header and footer sections of the report.

- 1. Once you define headers and footers, you can save them for use on other reports.
- 2. You can add page, time, and date stamps as needed, as well as images (e.g., company logo).
- 3. You can also use brackets to have it "stamp" the report with the Job Code and Job Description.

4. You can enter your own information as desired.

Print	Details	Layout	Header/Footer		
Setting	s: Defaul	t		 •	
	Date Prin	ted		Page Header	
	Time Print	ted			
	User Nam	ie 🔵			
	Version	2			
	Report Ti	tle			
	Company	Name		Report Header (first page only)	
	Image			[Report Title] [Company Name]	[Job Description][Job Currency][Job Created by
V Jo	ob Overviev	N		Job Code: [Job Code] Description: [Job Description]	4
	Job Code				
	Job Descr	ription			
	Job Curre	POCV			

Cover Sheet fields and Job folder tags

In addition to the existing job code and job description tags in Job Properties, you can use the Cover Sheet fields and Job Folder tags for your headers and footers in all standard reports.

Additional tag values such as contract numbers, work order numbers, PO numbers, company logos, or any other tag fields can also be included. These additions help you customize headers and footers to give the recipients more transparency in the reports.

verview Cov																							
	er Sheet Cost Basis Hinority	Setup Fixel Cost 3xt	Folder Tegs Pricing	Scheckle Cas	Flav Coverent N	sinterance	Benchmarking Atternates																
lentification	1-10 MP LO0 to MP 120			Toor Maharu	nd General Engineerin																		
City:	-				ngineer Fred Jones																		
	Maricopa			Ourien Haricapa					ost Ereskdown Stru	ches Datals						Condenant & FERT							-
	United States +			-arcan		_										PO # AC648						INE	IGHT
		3ob Properties 0						-	Description Location	 Training Job Maricopa Cou L-10 MP 100 to 	MP 120	rproveme	18									Owner: Mari	cope County Tom S
	Arzona +	Overview Cover Shee	Cost Basic Mins	nty Setup Puel O	at Job Polder Tegs	Pricing	Schedule Cesh Flow Equips	270er	Bid Date	1/6/2020 3:00	*	-											
Lattader		Job Folder Tag Assignme	da .						From Cost liter	s 1		-		Cost Bern: 0.10									
Longitude			New Tog		1	g 13: No	re Tag -	•	KS Posters		Case:	Goet Nem	Compare in the							and Total Coarts by Cats			
rapoani		Teg 2	1H2924		1	9.24 6/	14/2022	· •	9.0	and the second	See		Quantity UNI		Unit Cost Total		R Dynatteipa	et Kennel Braupe	nent Waterla	a bertes	B-0000-Bill	Tree	Attavance CustoerCatego
Bid Deb	n: 1/5/2020 +	Teg 3			1	og 15:		-	575	VORCE ROADWAY	Detel		18 548		1967-001-00 1967-M	411,355			040 (.588,988 040 1,585,988		0.00	73,30994 75,20994	500-60 1,360 500-60 1,360
Eld Time	E 8:00 AM	Tep 4	Farah			a 18:		- 1	Sides.														
Estimato	to Example Prime Contractor 1	Tep 5)			-			Fay Ban Assignment 1 Default Properties	Annual Code	East G		Tegs	7427	Tag 3	Tage		Tag 9					
BidLocatier	togineer's Office	Tag 6	Contract # 5532		,	g 18:		-		Optional Code	Phone C	-	Owner's Qy.	Quella Ornati	Quantify Driver	Minority Allese	NO.						
week Estimate	-	Tag 7	PO # AC6443			g 19:		-	Ovfault Pay Rollet:	Viage Scale 1	Wage Sec		1.00 Wage State 2	Resource Tech Res	Paylers Resource Fax He	FOE DPG	Vot Re		515124	Days-Work			
		Tag i				g 29: 6/	12/2622 -			136.00		1.00	0.30	8.00	8.08	Anargumenta				5.00			
		Tep 9			1	g 21:	0.0		Production: Depution	Days	Shife	Fours	Nan Hours	Equip-Hours	Cost: Duration	ContDay	VORUM IN	VIEW	CONCEPTION OF	uncel It.			
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		Teg 11	New Teg			g 23:		-		10	0.0	0.00	3.23	0.00		4113	481.05	5,812.37	13,85847	10,0454			
		Teg 12			-	924																	

A Header and Footer field menu exists to the left of the Page Header and Page Footer grid, for all standard reports. This lets you choose which fields from Job Folder Tags and the Cover sheet to include in your report.

Reports	Print Details Layout Header/Foo	oter		
Job Properties				
Foundation Setup Data				
V 🚊 Resources	Fields	^ _≜ Page Header		
Resource Register				
Resource Changes	> Report			
Resource Rate Details	> Job Overview			
Resource Utilization				
Resource Utilization (Excel)	 Job Tags 			
Resource Currency Comparison	Tag 1	Report Header (first page only)		
Resource Assemblies		[Report Title]	[User Name]	
> 🕋 Cost Breakdown Structure	Tag 2	[Company Name] Job Code: [Job Code]		
> 🚍 Quotes	Tag 3	Job Code: [Job Code] Description: [Job Description]		
> T Price Breakdown Structure	Tag 4			
> 🖺 Pay Item & Proposal	i ag 4			
> 🚮 Biling Rate Reports	Tag 5	Report Footer (last page only)		
Estimate Comparison Report	Tag 6	[Company Name]		
Audit				
Job Register	Tag 7			
> 💒 Library Module	Tag 8			
Custom Reports		Deep Franke		
Saved Views	Tag 9	Page Footer	Annulate BARA to Ficket to Att Product Processed	Davi 4 - (Davi - 4
Master Layout Settings	Tag 10	[Date Printed] [Time Printed]	Copyright @022 InEight Inc. All Rights Reserved.	[Page # of Pages #]
Master Header/Footer Settings	Tracti			
	Tag 11			

You can customize your header and footer layout settings, save them, and re-use them in other reports.

Settings:	Default	
Print D	etails Layout Header/Foo	ter
Settings:	Default	
	Custom	
	Default	
Fields	1	Save New Settings - 🗆 🗙
✓ Repo	2	
	Header/Footer w Logo	Name: Resource Rate Details option 1
P	Header/Footer w Logo - Lundy	
P	InEight Header/Footer w Logo	
	LibraryJobProperties	OK Cancel
D	LibraryJobProperties2	
		IREPORT LITIE

9.1.3.5 Report Detail Settings

Most reports have a Details tab with various options to configure what information is included on the report.

Show the below Pay item details	Filter by currency:	No Filter
🗹 Line Number		NOTILE
	-Show the below Proposal	header items
🗹 Pay Item Number	Job Code	Job City
Position Code	Job Description	Job County
Subtotals	Bid Date	🗌 Job State
Running Totals	Bid Time	Job Country
Suspended Items	Job Location	
Include Additional Proposal pages	Term for Document	
Cover Sheet	Proposal/Bid	
Preferences Sheet	◯ Tender	
Unit Price precision	O Custom	
Truncate values based on decimal precision		
○ Do not truncate values (show decimal precision)		
Certification Text: O None O Cus	stom	
		^
		×
gnature Block:		

9.1.3.6 Save Output Settings

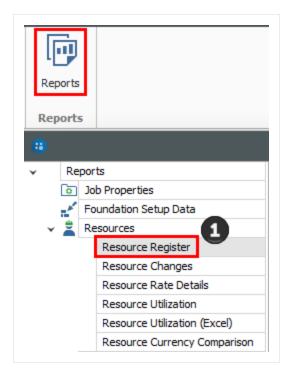
Once you've configured your settings for the report, you can save them as a custom version of that report.

✓ Re	eports	^	Setting	s: Estim	ate Summary	- Foreman	•	Alternate Sc	enario:
o	Job Properties		Jerring					BASE	
	Foundation Setup Data		Print	Cost Ite	m Selection	Details	Layout	Header/Footer	1
- 🗸 🚢	Resources							,	
	Resource Register		Pri	nt a conti	guous range	of cost iten	ns:		
	Resource Changes		F	rom:	5.1				-
	Resource Rate Details								
	Resource Utilization		٦	o:	6.2				-
	Resource Utilization (Excel)								
	Resource Currency Comparison			ect cost i	tems to print	from the re	aister helo		
-> 🐕	Resource Assemblies		0.50	00000	tems to print	from energ	.gister bero		
→ ¹	Cost Breakdown Structure					Find:	[Search F	or] …	Saved
	CBS Summary								
	CBS Details		Inc	lude	CBS Position Cod	le 🗎	Description		
	CBS Outline		<i>→</i>				Prime Bond	1	
~	Estimate Summary						Price % Ad		
		n					Job Finance		
	Estimate Summary - Forema								

The following steps walk you through configuring the settings and formatting for two different reports.

Step by Step — Configure Report Output Settings (Report 1)

1. Open the **Training Job** and select **Setup >Report>Resources**.



2. Under Resources on the left side bar, select **Resource Utilization**.

•						Reports - Res	ource Utilizatio	n
¥	Re	ports	Settings:	Defau	lt		•	
	Job Properties		beeninger	Settings.				
	*	Foundation Setup Data	Print	Details	Layout	Header/Footer]	
~		Resources		Detailo	Layout			
		Resource Register		to Printe	r			
	Resource Changes		Print Settings					
		Resource Rate Details	-Print Se	ettings —				
		Resource Utilization	Print	er: \\HD	AZPrintServ	.harddollar.local\M	ain Office	Change
		Resource Utilization (Excel)						
	,	Resource Currency Comparison						

3. On the Print tab there are three options. A best practice is to always set to **Preview** so you can review before printing.

	Details	Layout	Header/Foo	ter		
O Prin	t to Printer					
-Print S	Settings —					
Prin	ter: \\HD	AZPrintSer\	/.harddollar.loo	al∦Main Offic	te	Change
	ort to File t Settings -					
File:						
File: Form	at: PDF Fi	le	\sim	Options	3	
	at: PDF Fi	le	~	Options	;	

4. On the Layout tab you can make adjustments based on your preferences.

	Layout Header/Footer) ·	Margins	Top: 0.50 🔹	Header:
 Portrait Landscape Paper Size: Le 	tter	~	Left: 0.50 🜩		Right: 0.50
Font			- Number Format	Bottom: 0.50 🜲	Footer: 0.25
Header Level 1: Detail Level 1: Header Level 2:	Arial Narrow, 8, Bold Arial Narrow, 8, Regular Arial Narrow, 8, Bold	•••	Cost summary: Unit cost: Quantity:	Decimal Precision 2 2 2	Significant Figures
Detail Level 2:	Arial Narrow, 8, Regular	•••	Percent:	2 ds separator	
			Currency: As-E	Entered	•

5. Move to the Header / Footer tab. Remove the default **Report Title** from the first page Header only and enter **Resource Utilization** in the center Report Header box as a title that will appear on the first page only.

	Details Lay	out Header/Footer	
Setting	s: Default		•
#	12 😗 📮	Insert Field 🗸	
Page He	ader		
Report	leader (first pa	ge only) 5	
[Report	Title]	ge only) 5	Resource Utilization
[Report	Title] ny Name] Job Code:	[Job Code]	Resource Utilization
[Report	Title] ny Name] Job Code:		Resource Utilization
[Report [Compa	Title] ny Name] Job Code:	: [Job Code] [Job Description]	Resource Utilization

- 6. Go to the **Details** tab, and you can see the details and options you can select to customize and adjust the report.
- 7. For this navigation, you will not Filter by currency; leave the selection as **No Filter**.
- 8. Under Report Type, choose the first option, **Resource Utilization Summary**.

Settings: Default 6	.
Print Details Layout	Header/Footer
Filter by currency: Report Type	No Filter
Resource Utilization S Resource Utilization S	ummary 8 ummary with Employed Cost Items

 You can choose to select the Hide Zero quantity/cost Resources Employments Details box if you prefer to have your printed report not show any resources that have a dollar value of zero

	Details
	Exclude details and only show subtotals
	Show Currency Summary
_	Hide Zero quantity/cost Resource Employments

- You can choose if you want the report at a summary level, or if you want it to reference your cost items when you are looking at a resource
- If you choose Resource Utilization Summary with Employed Cost Items, it adds CBS position to the structure of the report
- You would select this if you wanted to see cost items and resources by the cost item

TIP The Details settings are "sticky" features, meaning they default to what was selected the last time.

- 9. You can use grouping to group by different tags and user-defined fields. Most of them are related to the Resource Rate Register, for example: Geographic Area, Organizational Category, Wage Zone, etc. For this example, group by **Resource Organizational Category**.
- 10. Next, you can choose the resources you want to see. For this example, select the **Labor** and **Construction Equipment** Resource Types.

oup By		Resource Type
Insert page breaks between the outerm	s	🗹 Labor
Resource Organizational Category	\sim	Construction Equipment
		Rented Construction Equipment
< no field selected >	~	Installed Material
< no field selected >	\sim	Installed Equipment
< no field selected >	\sim	Supplies
		Unique
< no field selected >	\sim	
< no field selected >	\sim	

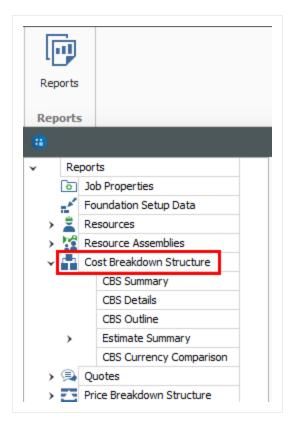
• For this example, you will not make any selections under Columns or Details

Columns	Details
Show Currency column	Exclude details and only show subtotals
Show plug rate for non-hourly resources	Show Currency Summary
Show tax separately from plug rate for non-hourly resources	
Show hours for non-hourly duration driven resources	

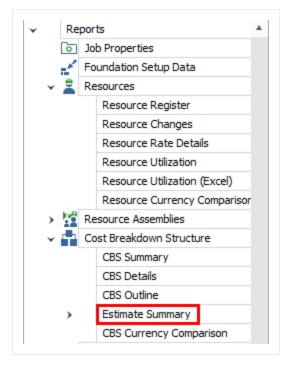
- This is just one of many ways to organize and adjust your report.
- 11. Click **Run** to run the report.
 - This report can be helpful for seeing your utilization hours, broken down by regular time and overtime hours
- 12. Click the red **X** to close this page and open the Construction Equipment page.
- 13. Click the red **X** to close the Construction Equipment report.

Step by Step — Configure Report Output Settings (Report 2)

1. Open the **Training Job** and select **Setup >Reports**, then expand the **Cost Breakdown Structure** node.



2. Under Cost Breakdown Structure on the left side bar, select Estimate Summary.



3. Along with the Print, Details, Layout, and Header / Footer tabs, there is an additional tab called **Cost Item Selection**. Select this tab.

Setting	s: Default		•	Alternate Sce	nario
Print	Cost Item Selection	Details	Layout	Header/Footer	

- 4. The Cost Item Selection tab allows you to report on a selection of cost items:
 - Print a contiguous range of cost items: Allows you to print a series of cost items in a row. In this case, print just items: select 4.1 in the From field and 4.3.2 in the To field.
 - Select cost items to print from the register below: Allows you to use column filters to select the cost items to include in the report; leave this button unselected.
- 5. You can roll up your cost items to a certain CBS level for the report as well, depending on the level of detail you need.
- 6. On the **Details** tab, select **Days** for Cost item production field 1, and **Man-Hours / UM** for Cost item production field 2 (this report allows you to report on two production values).
- 7. Under **Resource Types**, uncheck all of the boxes except **Labor**, **ConstructionEquipment**, and **Installed Material**.

ilter by currency: No Filter	Resource Employments
General Group by: No Group	 Print Resource Employment Details Print resources in row number order Print resources in alphabetical order Print resource costs Print hours for hourly resources
When filtering, only include terminal cost items in total	Resource Types Ad-hoc Employments Labor
Cost item production field 1: Days Cost item production field 2: Man-Hours/UM	Construction Equipment Rented Construction Equipment Installed Material
Cost item text field: Currency	 Installed Material Installed Equipment Supplies
	✓ Unique

- 8. Leave the rest of the settings at their defaults, then select the Header / Footer tab.
- 9. In the center **Page Footer** field delete the existing text, then type **Confidential –Internal Use Only**.

Page Footer			
[Date Printed] [Time Printed]	Confidentia	I - Internal Use Only	[Page # of Pages #]

10. To save the settings you've configured, click on the **Settings** drop-down arrow above the output setting tabs.

Print	Cost Item Selection	Details	Layout	Header/Footer
Settin	gs: Default		-	
#	🛛 🔯 🚱 🔤 🔤	sert Field 🔹	, L	45

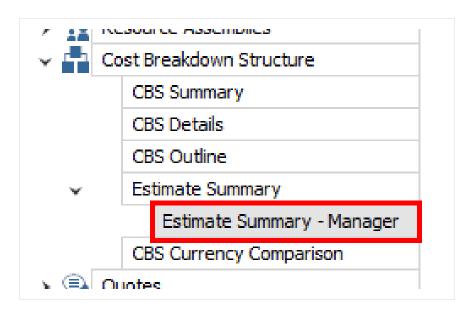
11. Select the **Save disk** icon to save the new settings.

Settings:	Default	-
· @ 6]	Custom	3
# 4 0	Default	
Page Heade	r	

- 12. Type Estimate Summary Manager.
- 13. Click **OK**.

Save New Setting	IS	—		\times
Name:	Estimate	Summary	- Manage	er
	Ok	(Cano	el

• Notice that a custom version of the report now displays under Estimate Summary on the Reports tree on the left



9.1.4 Helpful Reports

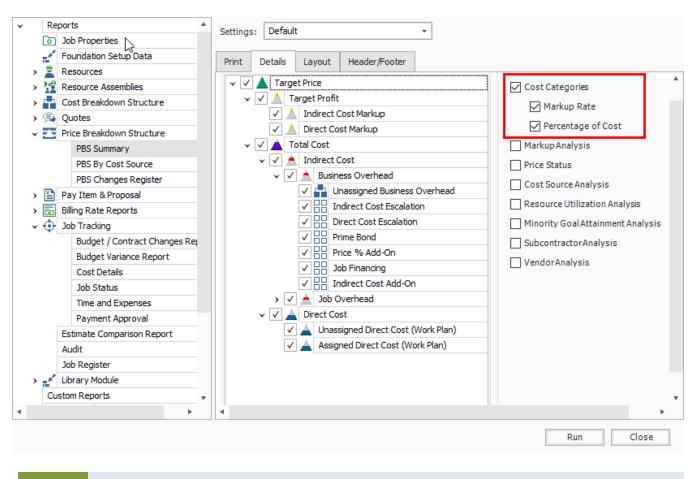
9.1.4.7 PBS Summary

Under the Price Breakdown Structure Report node, the PBS Summary Report gives a good overview of how your price breaks down by cost category. This provides a high-level overview that is cost category driven, providing information based on the total value of the project.

When selecting your settings on the Details tab, a best practice is to select and include:

- Cost Categories
- Markup Rate
- Percentage of Cost

This allows you to see your costs and markup broken out by cost category.



TIP You can also select to show markup rate and what percentage the markup is of your cost.

9.1.5 Standard Proposal

Located under the Pay Item & Proposal report node, the Standard Proposal report can be used for contractors required to submit a pricing proposal to a client. It lists all the pay items with the client provided quantities and your final pricing. You can include subtotals (defined on the Pay Item & Proposal Register), cover sheet information, and a signature block.

0	Job Code escription	:: Training J 1: Training J	ob ob - Maricopa County No. TM2924			
Position Code	Line No.	Pay Item No.	Proposal Description	Quantity Unit of Measure	Unit Price	Total Price
			Subtotal Description			
1	22	200	SITEWORK & ROADWAY			3,402,700.00
1.1	10	641 0100	Mobilization	1.00 Lump Sum	395,600	395,600.00
1.2	20	201 0102	Clearing & Grubbing	10.00 Acre	5,900.00	59,000.00
1.3	30	202 0183	Unclassified Excavation	50,000.00 Cubic Yard	5.50	275,000.00
1.4	40	303 5912	Aggregate Base	40,000.00 Tan	26.50	1,060,000.00
1.5	50	303 4263	Asphalt Concrete Hot Mix Type A	38,000.00 Tan	42.45	1,613,100.00
2	18	400	WATER & SEMER			718,550.00
2.1	60	413(B) 0464	36 Inch RCP Culvert Class III	1,000.00 Linear Feet	97.45	97,450.00
22	70	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00 Linear Feet	29.50	354,000.00
	80	800 0330	24 Inch PVC Gravity Sewer (SDR35)	3,000.00 Linear Feet	64.50	193,500.00

9.1.6 CBS Details

Under the Cost Breakdown Structure report node, the CBS Details report can be a helpful report for bid review. On the Details tab you can include or not include any of the information contained in the CBS Register, including cost items with production, costs by category, shift arrangements, resources, and notes.

From	Cost Item: 1					ost Item: 0.10								
	Journann 1				100	ostitem: 0.10								
SS Position			Cost	Cost Item								Uni	t and Total Costs by Cate	jory
ode	CI Description		Source		Quantity UM		Unit Cost	Total Cost	Labo	r Owned Equipm	ent Rented Equipme	nt Materi	iale Suppliee	Subcontract
	Mobilization		Detail		1.00 Lump 5	um	11,909.51	11,909.51	2,449.5	1 8.96	0.00 0.0	0 0	0.00	0.00
									2,449.5	1 8,96	0.00 0.0	o 0	0.00	0.00
	Ор	641 0100	Phase Code		Owner's Qty. 1.00	Quote Group	Quantity E Pay	Driver / Item	Minority Allow 100.00%	WC Ov	erride			
			Wage Scale 2		Wage Scale 3	Resource Work Hrs	Resource Pa		Default Shift Arrangements	Work Hr	e/Shift 8.00	Shifta/Day 1.00	Daya/Week 5.00	
Default Pay	Rulea: W	ige Scale 1 100.00	0.00		0.00	8.00		8.00			0.00			
Dəfault Pay I Produ					0.00	8.00		8.00						
Produ				Hours 80.00	0.00 Man-Hours 80.00	8.00 Equip-Houre 160.00	Cost / Dura		Cost/Day 1,190.95	Cost/Shift 1,190.95	CostHour 148.87	Costillian-Hr. 148.87	Cost/Equip-Hr. 74.43	

9.1.7 Audit

Under the Job Tracking node, the Audit Report is a very important report to run during estimate review to make sure you didn't leave anything out of the estimate. It checks for a number of potential errors in the estimate, including:

- Zero Price Pay Items
- Zero-value cost items
- Pay items without Cost Items assigned
- Resources with a quantity of zero

Exercise 9.1 — Run a System Report

You can adjust InEight Estimate system reports to report on the particular information you need. Complete the following steps to configure and run the Pay Item Summary report, using the Training Job:

- 1. From the Reports window, expand the **Pay Item & Proposal** report node.
- 2. On the Reports tree, select **Pay Item Summary**.
- 3. On the Details tab, select a Pay Item Range from 303 4263 800 0220.
- 4. Choose to Include Assigned Cost Items.
- 5. Show Costs As: Unit.
- 6. Include Profit Analysis columns and Include Pay Item Price columns
- 7. Run the report.

You should end up with the following results

ABC Contractors Job Code: Training Job Description: Training Job - Maricopa County No. TM2924

	From Item: 303 4263 PawCost Item		_		To Ite	m: 800 0220	Unit C	oat by Catego	200		
Code	Description	Quantity UM	Assigned Direct Cost	Labor	Owned Equipment	Rented Equipment	Materials		Subcontract	Feee	Allowance
303 4263	Asphalt Concrete Hot Mix Type A	38,000.00 Ton	42.62	3.11	6.43	0.00	31.50	0.00	0.00	1.58	0.00
	5 Asphalt Concrete Hot Mix Type A	38,000.00 Ton	1,619,430.35	3.11	6.43	0.00	31.50	0.00	0.00	1.58	0.00
	5.1 Furnish & Haul Hot Mix	38,000.00 Ton	1,492,382.18	1.43	4.77	0.00	31.50	0.00	0.00	1.58	0.00
	5.2 Install Hot Mix Type A	38,000.00 Ton	127,048.17	1.68	1.66	0.00	0.00	0.00	0.00	0.00	0.00
413(B) 0464	36 Inch RCP Culvert Class III	1,000.00 Linear Feet	66.42	19.60	13.48	0.93	30.82	0.00	0.00	1.59	0.00
	6 36 Inch RCP Culvert Class III	1,000.00 Linear Feet	66,416.79	19.60	13.48	0.93	30.82	0.00	0.00	1.59	0.00
	6.1 Furnish RCP Materials	1,000.00 Linear Feet	32,361.33	0.00	0.00	0.00	30.82	0.00	0.00	1.54	0.00
	6.2 Excavate RCP Trench	1,815.00 Cubic Yard	8,183.20	4.85	3.34	0.00	0.00	0.00	0.00	0.00	0.00
	6.3 Install RCP Pipe	1,000.00 Linear Feet	11,735.94	6.45	5.29	0.00	0.00	0.00	0.00	0.00	0.00
	6.4 Backfill RCP Pipe	1,550.00 Cubic Yard	14,136.32	8.31	4.86	0.93	0.00	0.00	0.00	0.05	0.00
	SUBTOTAL: SITEWORK & ROADWAY		1,685,847.14	137,894.00	257,768.56	926.90	1,227,820.31	0.00	0.00	61,437.36	0.00
800 0220	10 Inch PVC Force Main (SDR21)	12,000.00 Linear Feet	22.51	4.56	4.72	0.00	12.60	0.00	0.00	0.63	0.00
	7 10 Inch PVC Force Main (SDR21)	12,000.00 Linear Feet	270,163.37	4.56	4.72	0.00	12.60	0.00	0.00	0.63	0.00
	7.1 Furnish 10 Inch PVC Materials	12,000.00 Linear Feet	158,760.00	0.00	0.00	0.00	12.60	0.00	0.00	0.63	0.00
	7.2 Excavate-Install-Backfill 10 Inch PVC	12,000.00 Linear Feet	111,403.37	4.56	4.72	0.00	0.00	0.00	0.00	0.00	0.00
	Extended Totals By Category		1,956,010.51	192,599.77	314,466.16	925.90	1,379,020.31	0.00	0.00	68,997.36	0.00

Congratulations, you have completed this exercise!

9.2 REGISTER REPORTS

At any time, you can print a report of the data in the currently displayed register using the Print or Preview option available from the Actions tab for the register you are in.

File Setup	Estimate	Quote	Price Execution	System	Actions
Print	+ New	🔁 Сору	🔀 Split	➡ Indent	🚇 Link Field
🗟 Preview	🛞 Delete	Paste	🚉 Split by Cost Type	de Outdent	📇 Unlink Fie
🚰 Export to Excel	}< Cut	+ Fill Down	🔁 Toggle Suspended		
Print			Edit		Workbool
Cost Breakdown S	itructure (CB	S) Register	0		
CBS Tree (Filter N	lode)	×	Drag columns here to	group	

The data that prints is the data currently displayed on the register form. The report will print whatever columns are displayed on the register; if you have customized the display in the register, the report prints that data. In other words, register reports are entirely customizable.

By creating Saved Views, you can report the data on a register form in several different variations.

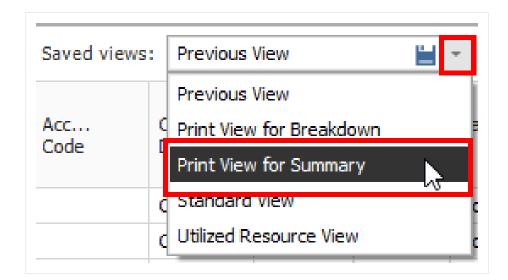
The following step by step example will walk you through creating a custom register report on resource utilization and saving it as a Saved View.

Step by Step — Create a Register Report

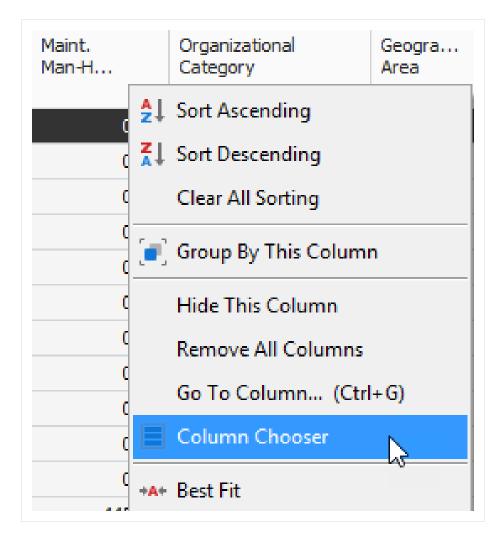
1. Open the Training Job and select Setup tab, then select the Resource Rates drop-down list.

🛞 💾 🚽	Estimate	Quote	Price	Execution System	
٥	-		***	Labor	â
Job Properties	Foundation Setup Data 👻	Pay Item & Proposal	Bid Wizard	Resource Rates Materials Assemblies	Cost Ite Assembli
	Initializ	ze		🐔 Labor	Ass
				🔐 Construction Equipment	
				hented Construction Equipment	
				Installed Materials	
				🎭 Installed Equipment	
				🛠 Supplies	
				🚑 Unique	

- 2. From the drop-down list, select **Labor**.
- 3. From your Saved Views drop down menu on the Resource Rate Register, select the **Print View** for Summary view.



- 4. Notice this view includes utilization hours
- 5. Right-click on a column header and select Column Chooser.



- 6. From the Customization window, drag-and-drop the Minority Percent, Unique Sales Tax, (Scale 2), and Maint. Man-Hour Factor columns into the register.
- 7. Close the Customize window.
- 8. Sort the **Utilization Count** column by clicking on the column header twice so that you see the bars descending.

} Resource Code	Utilization Count	=	Maint. Man-H	Organizational Category
+ LL2		8,946.59	0.00	Laborer
+ LO2		4,734.02	0.00	Operator
+ LT1		3,611.05	0.00	Truck Driver - Team
+ LO1		1,640.00	0.00	Operator
+ LO4		1,484.63	0.00	Operator
+ LC2		1,188.73	0.00	Carpenter
+ LO3		889.33	0.00	Operator
+ LSSUPT		800.00	0.00	Supervision
+ LSSEC		800.00	0.00	Supervision
+ LSPE		800.00	0.00	Supervision
+ LL3		721.33	0.00	Laborer
+ LIW1		594.37	0.00	Iron Worker

• This sorts your items so the most utilized resources are at the top

- 9. Click on the **Saved Views** drop-down menu and select the **Save disc** icon to save the view.
- 10. Name the view Labor Utilization View, and then click OK to save the customized view.
- 11. From the Actions menu, select Preview to review the report before printing.

Labor Register NEIGHT - PAUL TRIPPI E101 - Training Job KLSample Training Job									
Resource Code	Description	Utilization Count	Unit of Measure	Unique Sales Tax	Minority Percent	Maint. Man-Hour Factor			
L01	Operator Class 1	680.00	Hour	0.00	0.00	0.0			
LL2	Laborer	590.00	Hour	0.00	0.00	0.0			
LSSUPT	Project Superintendent	560.00	Hour	0.00	0.00	0.0			
LSSEC	Secretary	560.00	Hour	0.00	0.00	0.0			
L03	Operator Class 3	220.00	Hour	0.00	0.00	0.0			
LL3	LaborForeman	200.00	Hour	0.00	0.00	0.0			
L04	Operator Foreman	110.00	Hour	0.00	0.00	0.0			
LT1	Teamster	100.00	Hour	0.00	0.00	0.0			

9.2.1 Register Report Output Settings

Within the Preview for a register report, there are several options to choose from to configure the output of your report.

9.2.1.1 Page Setup

While in the Preview mode, selecting **File > Page Setup** provides setup options for the page format:

- Page Size (legal, letter, etc.)
- Paper Width & Height
- Orientation (portrait or landscape)
- Page Margins (left, right, top, bottom)

9.2.1.2 Exporting to Document

Using the Export function allows you to identify a Print range, Image quality, Password Security, and more. Selecting **File > Export Document** prints an Adobe Acrobat (*.pdf) report.

Exercise 9.2 — Create a Custom Register Report

You can configure the columns in your registers for reporting and run your own custom reports. Complete the following steps to configure and run a report from the CBS Register, using the Training Job:

- 1. Select Estimate>Cost Breakdown Structure (CBS).
- 2. Under Saved Views, Select CBS Simple View.
- 3. Hide the **Optional Code column**.
- 4. Add back in the Man-Hours (Total) and Man-Hours / UM columns.
- 5. Now add back in the Labor Total Cost, Owned Equipment Total Cost, and Materials Total Cost categories for reviewing the estimate.
- 6. Save the View (create your own name for the view).
- 7. Select **Preview** to view the report.

You should end up with the following results

ABC Contracting Inc

Cost Breakdown Structure (CBS) Register

Training Jo	bTraining Job - Maricopa Co	unty No. TM2	924									
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Man-Hours (Total)	Unit Cost	Labor Total Cost	Total Cost (Forecast)	Man-Hours ptal incl. Maintenan	ed Equipment Total	Man-Hours/ UM	Materials Total Cost	Currency
	JOB	20.00	Mile	27,993.15	\$306,883.14	\$907,442.76	\$6,137,662.81	28,438.44	\$1,062,750.40		\$3,393,700.70	U.S. Dollar
	Prime Bond	1.00	Lump Sum		\$48,686.14	\$0.00	\$48,686.14		\$0.00		\$0.00	U.S. Dollar
	Price % Add-On	1.00	Lump Sum		\$309,475.27	\$0.00	\$309,475.27		\$0.00		\$0.00	U.S. Dollar
	Job Financing	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Indirect Cost Escalation	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Direct Cost Escalation	1.00	Lump Sum		\$11,026.79	\$12,026.79	\$11,026.79		\$0.00		(\$1,000.00)	U.S. Dollar
	Indirect Cost Add-On	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Job Management & Equipment	1.00	Lump Sum	2,400.00	\$157,096.28	\$91,176.28	\$157,096.28	2,400.00	\$65,920.00	2,400.00	\$0.00	U.S. Dollar
	GeneralExpense	1.00	Lump Sum	0.00	\$4,200.00	\$0.00	\$4,200.00	0.00	\$0.00	0.00	\$0.00	U.S. Dollar
	Direct Cost Add-On	1.00	Lump Sum		\$109,544.08	\$15,676.56	\$109,544.08		\$19,450.89		\$66,546.70	U.S. Dollar
1	Mobilization	1.00	Lump Sum	0.00	\$75,000.00	\$50,000.00	\$75,000.00	0.00	\$0.00	0.00	\$25,000.00	U.S. Dollar
2	Clearing & Grubbing	10.00	Acre	0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	U.S. Dollar
3	Unclassified Excavation	50,000.00	Cubic Yard	3,964.29	\$9.95	\$110,467.00	\$497,466.56	4,115.48	\$302,999.56	0.08	\$0.00	U.S. Dollar
3.1	Excavation, scrapers	50,000.00	Cubic Yard	1,250.00	\$3.00	\$33,170.48	\$149,922.88	1,325.00	\$116,752.40	0.03	\$0.00	U.S. Dollar

Congratulations, you have completed this exercise!

Lesson 9 Review

- 1. The ______ Report gives a good overview of how your price breakdowns by cost category.
 - a. Estimate Summary
 - b. PBS Summary
 - C. Audit
- 2. The ______ Report is a very important report to run during bid review to make sure you didn't leave anything out of the estimate.
 - a. CBS Details
 - b. Audit
 - C. Pay Item Summary
- 3. A best practice is to always set your Print output setting to **Preview** so you can review before printing.
 - a. True
 - b. False

Lesson 9 Summary

As a result of this lesson, you can:

- Run reports from the Report menu
- Create and run reports from register forms

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LESSON 10 – DATA REPRODUCTION

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create a job from an existing job or template
- Create a template
- Reproduce estimate data using the Bid Wizard
- Reproduce estimate data using copy/paste
- Add cost items to a job using the CBS Bid Wizard
- Utilize the Snapshot function

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10.1 COPY AN EXISTING JOB

As you build an estimate, you may want to reuse pay items, cost items, or resources from a previous estimate. When you plan to reuse the majority of content within a job, you can simply make a copy of the existing job.

Using the **Create a new Job from... Existing Job** option on the Backstage View creates an exact replica of the existing job, including the job's properties, pay items, cost items, and resources.

The following Step by Step walks you through how to make a copy of an existing job.

Step by Step — Copy an Existing Job

1. Click the **File** tab on the **Estimate** landing page.

🛞 💾 - Library - Estimate													
File Setup	Estimate	Exec	ution	System	Integrations	Actions							
(°)			甸		#	🐔 Labor		2		4	11+	P	
	- 1		H	1881		📇 Equipment	10	33 L		G	1.11	- 'LP'	
Job Properties	Foundation Setup Data 🔻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Master I	nitializatio	on		1	laster Resourc	es	Master As	semblies	Roles and Pe	ermissions	Reports	

2. From the left side panel, select **New**, then select **Existing Job**.

\odot	Library - Estimate
Start	Create a new Job from
New	
Open	
Save	
Close Job	Scratch Template Existing Job Bid Wizard Archive Snapshot Primavera US Cost
Close All Jobs	
Jobs	
Library	
Templates	
Snapshots	
Archive / Restore	
Settings	
Exit	

3. The Job Register displays a list of your existing projects; select the Training Job and click **OK**.

- 4. On the New Job dialog, in the Code field, type Infra Job Copy with your initials.
- 5. To copy the cost details from the existing job to the new job, verify that the **Copy Cost Details** checkbox is selected
 - If you wanted to copy just the cost item structure without cost details, you would uncheck the box.
- 6. Uncheck the check for copying the PBS Changes Log.
- 7. Click **OK** to create the new job.

9	New Job from 'Training Job'
Code: *	Infra Job Copy
	Copy Cost Details
	Copy PBS Changes Log
	Copy RFQ's, Quotes and Commitments
	OK Cancel

The new job opens with the Job Properties form active, so you can begin to modify the new job as needed. If you look through the tabs on the Job Properties form, you will find that it looks exactly like the job from which it was copied. Other forms, such as the Pay Item & Proposal Register and the CBS Register, also look the same in both jobs until you make modifications in one job or the other.

This is a very easy method for creating a new job, and it is a good choice if you want to copy an entire job. However, if you want to pick and choose which parts of a job to duplicate, the Bid Wizard is a better choice.

10.2 TEMPLATES

Job Templates provide you the ability to maintain a list of template jobs that can be used to create new jobs. As your company grows and increases the number of projects, the need to standardize the

estimating process increases to ensure consistency and reduce the chance of information being overlooked.

In InEight Estimate you can create job folders and store them in a separate register as templates. This allows you to store cost items in master templates separate from the jobs in your Job Register.

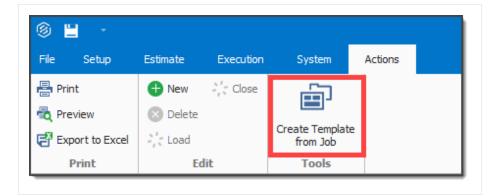
You can create templates from scratch or from existing job folders. The following steps walk you through how to create a new template from an existing job folder.

Step by Step — Create a Template

- 1. Click the **File** tab on the Estimate landing page.
- 2. From the left side panel, select **Templates**.
- 3. Under Templates, select the Template Register.

\bigcirc	
Start	Templates
New	
Open	
Save	
Close Job	Template Register
Close All Jobs	

4. From the Actions tab, select Create Template from Job.



- The Job Register opens for you to select the source job for the template
- Assume that you want to make a template from your E101 Training Job
- 5. Select the E101 Training Job with your initials, then click OK.

ag c	columns here to group			Find: [Search For]	Sa	ved views: Previo	us View	•
(Code	<u>h.</u>	In Use	Description	Status	Schedule	Location	City
E	E101 - Training Job KL			Sample Training Job	Bidding	Microsoft Proj	90th Street & Shea	Scotts
7	Training Job		v	Training Job - Maricopa County No. TM2	Bidding	Microsoft Proj	I-10 MP 100 to MP	Phoenix
		2						

NOTE

You cannot create templates from jobs that are published to Job Tracking.

• A prompt appears to give your new template a Job Code

Code: *	
	🗹 Copy Cost Details
	🗹 Copy PBS Changes Log
	Copy RFQ's, Quotes and Commitments
	OK Cancel

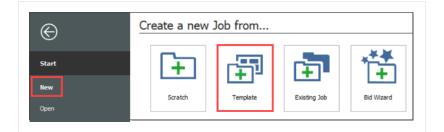
- 6. In the Code field, type **Small Project Template[your initials]**.
 - Leave Copy Cost Details and Copy PBS Changes Log checked
- 7. Click **OK**.
 - The new template is created and opens to the Job Properties form
 - You can add the description in addition to the code for any new job you are creating from a template. This description is later added to the Overview tab of the new job on the Job Properties form

Overview Security Cover Sheet Cost Basis Minority Setup Fuel Cost Job Training Code: 099KL	
	acking
Description: Sample Training Job	

• Back in the Templates Register, you can see the new template created

ile	Setup	Estimate	Execution	System	Actions		
	review	New	ें Load देखे Close	Create Temp	ate		
2° B	xport to Excel	😣 Delete		from Job			
	Print	E	dit	Tools			
_	plate Registe						
-	Code	groop	<u>1</u>	In Use	Description	Status	Schedule
	0000			Inose	Description	318105	Schedule
$\rightarrow q$	Smal Project Ter	molate KL		\checkmark	Sample Training Job	Bidding	Microsoft Proj

• Similar to copying an existing job, you can create a new job from a template from the New menu in the Backstage View.



 You can also create a new job from a template from the New menu in the Bid Wizard.



- 8. Select Add to existing job
- 9. From Select Source Job, click the dropdown arrow
- 10. Click Next
- 11. Select a job that is shown as having a Template
- 12. Click **OK**

1	Bid Wizard	×	9					Job Register			
Step 1: What would you lik	e to do?		Drag colum	ns here to group		1		Find: [Search For] ···· Saved	views: Prev	ious View	-
O Create a new job:			Code		<u>.</u>	Is Template	In Use	Description	Status	Schedule	Location
New Code:			→ 099K0			✓		Sample Training Job	Bidding	Microsoft Proj	90th Stree
Description:			E101	- Training Job KL				Sample Training Job	Bidding	Microsoft Proj	90th Stree
-	Select Source Job]		Small	Project Template KL		✓		Sample Training Job	Bidding	Microsoft Proj	90th Stre
1	0	Next > Cancel			•						
			4							ок	Cancel

10.2.1 Archive and Restore Templates

The templates feature gives you the ability to archive and restore templates, enabling templates to become portable. You can move templates between different environments. You can also backup the templates similarly to the Jobs Archive and Restore function.

Step by Step — Archive and Restore a Template

- 1. Click File to open the Backstage View.
- 2. Select Archive / Restore.
 - Several options appear for archiving and restoring your jobs, templates, and library
- 3. Select Archive Template.
 - The Template Register appears
- 4. Select the Small Project Template [your initials] template you previously made, then click OK.
- 5. When prompted to include attachments, click **Yes**.
 - The Save As window appears
- 6. Browse to where you want to save the job, then click **Save**.
- 7. Select **Restore Template** from the Archive / Restore page of the Backstage View to begin restoring the template.
- 8. Browse to the archived template and select it.
- 9. Click **Open**.

- If the template already exists, a prompt will appear asking if you want to overwrite it
 - To overwrite it, select Yes
 - If you select No, you will be prompted to save it under a new Template Code

10.3 BID WIZARD

InEight Estimate's Bid Wizard is a powerful tool that can help automate the process of setting up estimates by copying information that already exists in other InEight Estimate job folders. The Bid Wizard can be used to create new projects, create a new job from an existing template, or to add to projects that are already underway.

Rather than copying every part of an existing job, the Bid Wizard gives you more flexibility and control over which parts of a job you want to duplicate, e.g., pay items or cost items or both.

In most cases you will be copying cost items, but if you have a project with pay items that are commonly used, you can copy them into a new project. If you select pay items, you will be able to select cost items as well.

The following Step by Step walks you through how you can use the Bid Wizard to create a new job by importing pay items and their associated costs from an existing job.

Step by Step — Use the Bid Wizard

1. To open the Bid Wizard, click the **File** tab on the Estimate landing page.

												ibrary - Estimate
Estimate	Exec	ution	System	Integrations	Actions							
		∄			🐔 Labor		â		÷	†4†	P	
Foundation Setup Data 🔻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Foundation etup Data *	Foundation Address	Foundation etup Data + Address Book Calculator	Foundation Hold Pata - Address Book Calculator	Foundation Holdress Trench Shift Rate Book Calculator Calculator Rates +	Foundation Address Trench Shift Rate Book Calculator Salculator	Foundation Address Trench Shift Rate Book Calculator	Foundation Address trup Data Address Trench Shift Rate Resource Calculator Result Resource Return Resource Resource Resource Resource Resource Resource Resource Resource Resource Resource	Foundation Address trap Data Address Trench Book Calculator Calculator Calculator	Foundation Address Trench Shift Rate etup Data + Address Trench Scalculator Calculator	Foundation Address tup Data + Book Calculator Address Calculator C	Image: Second ation Image: Second at

2. From the left side panel, select **New**, then select **Bid Wizard**.

\odot	Library - Estimate
Start	Create a new Job from
New	
Open	
Save	
Close Job	Scratch Template Existing Job Bid Wizard Archive Snapshot Primavera US Cost
Close All Jobs	
Jobs	
Library	
Templates	
Snapshots	
Archive / Restore	
Settings	
Exit	

• The Bid Wizard – Step 1 dialog displays

6	Bid Wizard	×
Step 1: What would you	like to do?	
Oreate a new job:		
New Code:		
Description:		
○ Add to existing job:	[Select Source Job]	
		Next > Cancel



Notice that you can either create a new project or add to an existing project.

- 3. Type **E101 Bid Wizard** (with your initials) in the New Code field.
- 4. Type **Bid Wizard Example** in the Description field.
- 5. Click the **Next** button.
 - The Bid Wizard Step 2 dialog displays
- 6. Choose Select cost items and click Next.

9	Bid Wizard X
Step 2 of 5: What	should fill the new Job?
○ Select pay items	from a source Job folder (or import them from an electronic file), and optionally, copy their corresponding cost items.
Select cost items	from a source Job folder.
	< Back Next > Cancel
	Concerner Concerner

- The Bid Wizard Step 3 of 4 dialog displays
- You use this step to indicate which source you want to pull your setup data from (the library or your source job)
- 7. For all selections, select **Copy from source job**.
- 8. Check the Also copy all non-utilized resources checkbox.
- 9. Select **Copy from source job** under Unassigned Cost Items and Markup, and the **Copy Markup** box is automatically selected.

Job Properties	Job Properties contains the Overview, Security,
○ Copy from Master Job Properties	Cover Sheet, Cost Basis, Minority Setup and Fuel Cost for the job.
● Copy from sourcejob	cost for the job.
Foundation Setup Data	Foundation Setup Data contains the Account Codes
O Copy from Master Foundation Setup Data	Tags, Quote Group Tags, Units of Measure, Currencies, Resource / Assembly Files, Geographic
Copy from source job	Areas, Wage Zones, Organization Categories and Weather Tags.
Resources and Resource Assemblies	Resources and Resource Assemblies that are
Copy utilized Resources and Resource Assemblies from source job	utilized by Cost Items in the source job(s) are copied by default. Optionally, all Resources and
Also copy all non-utilized resources	Resource Assemblies can be copied from the source job(s) into the new job.
Unassigned Cost Items and Markup	Unassigned Cost Items are those cost items in the
○ Copy from Master CBS	CBS that are not assigned to specific pay items, including Prime Bond, Job Financing, General
Copy from source job	Expense, and others.
🔽 Copy Markup	
Workbook	The workbook contains data that is used to link
○ Copy from Library	fields in Estimate to cells in Excel. The workbook containing the data that you want to
Copy from source job	use for linking with Excel can be copied from the Library or the source job.

- 10. Click Next.
 - The Bid Wizard Step 4 of 4 dialog displays
- 11. Click the **Source Job** drop-down arrow.

choose the sour elect Source Job] o group 285 osition Code	Ce Cost Items	to copy. Find: [Search For]	Sa	ved views: S	tandard View Optional Code	Forecast
o group CBS =		Find: [Search For]	Sa	ved views: S	Optional	Forecast
BS :	E Description	Find: [Search For]	Sa	ved views: Si	Optional	Forecast
	Description					
					Code	(T/O) Quant
All					< Back Finish	Cancel
	All	All	All	All	All	All Sack Finish

- The Job Register opens
- 12. Find and select Training Job.
- 13. Click **OK**.
 - This screen displays the cost items of the source job (Training Job). All items are automatically selected
- 14. Use the **Toggle Include All** button to exclude all selections.

				e source Cost							
	Sourc	e Job: 1	Fraining Job	•							
rag) colum	ins here	to group		Find	: [Search For.]	Saved views:	Standard View	1	•
	Indu	de	CBS P ≞ C	Descr	Optional Code	Forec (T/O) Quan	Unit of Meas	Unit Cost	Total Cost (Fore	Curre	Accour Code
>			1	Mobilization	641 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51	U.S. Dollar	1020
			2	Clearing &	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97	U.S. Dollar	1110
			3	Unclassifie	202 0183	50,000.00	Cubic Yard	\$4.79	\$239,582.64	U.S. Dollar	1122
			3.1	Excavat	3.1	38,227.74	Cubic Meter	\$3.90	\$149,236.48	U.S. Dollar	1122.1
			3.2	Embank	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.16	U.S. Dollar	1122.2
			4	Aggregate	303 5912	45,000.00	Ton	\$15.15	\$681,696.99	U.S. Dollar	1120
			4.1	Furnish	4.1	45,000.00	Ton	\$11.54	\$519,513.30	U.S. Dollar	1120.1
			4.2	Finegra	4.2	400,000.00	Square Yard	\$0.18	\$73,352.36	U.S. Dollar	1180
			4.3	Install A	4.3	45,000.00	Ton	\$1.97	\$88,831.33	U.S. Dollar	1120
			4.3.1	Place	4.3.1	45,000.00	Ton	\$1.55	\$69,716.92	U.S. Dollar	1120.2

- 15. Select the checkboxes to include **Mobilization**, **Clearing & Grubbing**, and **Unclassified Excavation**.
- 16. Notice that when selecting Unclassified Excavation, that cost item's subordinates are automatically selected

Sou	urce Jo	b: Tr	aining Job	•							
rag co	olumns h	iere t	o group		Find	: [Search For.]	Saved views:	Standard View	1	•
In	ndude		CBS P ≞_ C	Descr	Optional Code	Forec (T/O) Quan	Unit of Meas	Unit Cost	Total Cost (Fore	Curre	Accour Code
	~		1	Mobilization	641 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51	U.S. Dollar	1020
	 ✓ 		2	Clearing &	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97	U.S. Dollar	1110
/ =	 ✓ 		3	Unclassifie	202 0 183	50,000.00	Cubic Yard	\$4.79	\$239,582.64	U.S. Dollar	1122
	 ✓ 		3.1	Excavat	3.1	38,227.74	Cubic Meter	\$3.90	\$149,236.48	U.S. Dollar	1122.1
	√		3.2	Embank	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.16	U.S. Dollar	1122.2
			4	Aggregate	303 5912	45,000.00	Ton	\$15.15	\$681,696.99	U.S. Dollar	1120
æ			4.1	Furnish	4.1	45,000.00	Ton	\$11.54	\$519,513.30	U.S. Dollar	1120.1
			4.2	Finegra	4.2	400,000.00	Square Yard	\$0.18	\$73,352.36	U.S. Dollar	1180
			4.3	Install A	4.3	45,000.00	Ton	\$1.97	\$88,831.33	U.S. Dollar	1120
H			4.3.1	Place	4.3.1	45,000.00	Ton	\$1.55	\$69,716.92	U.S. Dollar	1120.2

- 17. Click **Finish** to add the new job.
 - An Attention prompt appears asking, "Do you want to adjust Pay Rules and Shift Arrangements of the copied cost items?"
 - Typically, you will want to use the shifts and payment rules of your new destination job.
- 18. Select Adjust the pay rules and shift arrangements to match the destination.

9	Attention
You have ordered	one or more cost items to be copied by the Bid Wizard.
	adjust Pay Rules and Shift Arrangements of the copied cost items?
Adjust the pa	ay rules and shift arrangements to match the destination
Never ask me	e this question again
	ОК

- 19. Click **OK**.
 - A help bubble appears letting you know the job has been created, and that you can use the ribbon tabs on the Estimate landing page to open any form
- 20. Close the help bubble by selecting the \mathbf{X} in the upper right corner.



21. Open the **Estimate > CBS** to see the three cost items that were brought in.

g	columns here to group				
	CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure
		ЈОВ		1.00	Lump Sum
	+	Prime Bond	PRIME BOND	1.00	Lump Sum
	+	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum
	+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum
	+	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum
	+	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum
	+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum
	+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum
	+	General Expense	GENERAL EXPENSE	1.00	Lump Sum
	+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum
	+ 1	Mobilization	641 0 100	1.00	Lump Sum
	+ 2	Clearing & Grubbing	201 0 102	10.00	Acre
	□ 3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard
	+ 3.1	Excavation	3.1	38,227.74	Cubic Meter
	+ 3.2	Embankment	3.2	42,432.79	Cubic Meter

10.3.1 Bid Wizard Updates

While using the Bid Wizard, the Include option is left unchecked by default. A filter is applied to bring in pay items when using the Bid Wizard. The Toggle Include All button only selects the filtered list of items instead of all items.

When the filter criteria is modified, the selected items remain checked even if some of the items might not be visible in the view. When the view is changed, the selected items remain checked.

Tags and UDF fields are included in the **Bid Wizard Selection** register for the cost items and Pay Item & Proposal selection registers. This lets you filter the list of cost items based on a tag or UDF.

When you select the **Toggle Select All** button, only filtered items are included which allow you to include scopes of work relevant to your estimate without having to manually select all items needed.

2raq	colur	ins her	e to-proup				58	ved views:	Standa	nd Vilew	-
	Indu	de	Pay Item Number	Tag 8	Tag 9	Teg 10	User Defined 1	User Defin	ed 2	User Defined 3	Us
	+	1	501(A) 1306				EarthWork				
	+	1	506(A) 1322								
	+	1	503(A) 1313				Special Constructi				
P.	+	\mathbf{V}	600 0300								

10.4 COPY ESTIMATE DATA USING EDIT COMMANDS

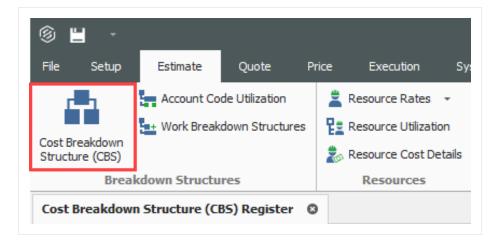
While the Bid Wizard is an efficient way to copy cost history into new projects, you may prefer to use edit commands such as copy and paste to bring cost history into your estimate.

To copy and paste cost history from one job to another, it is beneficial to see the jobs side by side. The following steps walk you through the process.

Step by Step — Copy Estimate Data Using Edit Commands

- 1. Click the **File** tab from the Estimate landing page and open the **E101 Bid Wizard** job you just created.
- 2. Open the Training Job (if you do not still have it open).

3. Make sure the CBS is open for both jobs by going to the Estimate menu and selecting **Cost Breakdown Structure (CBS)**.



4. Since you have both jobs open and they are in their own application window, align them to be side by side by using the **minimize icons** of each job or utilizing Windows align functionality.

			-	ð	×
				鱼	1
					^
					-
]	Saved views:	Standard View			•
lv 🛛	Hours		Hours		

• Note that the window caption identifies the CBS Register for each job

ô 💾 -							< (ê 💾 -						
File Setup Estima	te Quote Price Execution	System Integrations	Actions More Act	ions		金田(File Setup Estima	e Quote Price Execution		Actions More Ac	tions		盒目
Cost Breakdown Structure (CBS)		Indirect Price	Reakdown ture (PBS) ▲ Alternate	Scenario: nates	Reports		C S	Cost Breakdown Structure (CBS)	Worlbook Schedule Cash Flow	Indirect Price	Breakdown ture (PBS)	e Scenario: 	Reports	
Breakdown Struc Re	zs Workbook Schedule	Indirect Cost Over	rhead and Pr	Alternates	Reports		^ E	Breakdown Struc Re	s Workbook Schedule	Indirect Cost Ove	rhead and Pr	Alternates	Reports	
Cost Breakdown Structu	re (CBS) Register 🛛 🔘						- 0	Cost Breakdown Structu	e (CBS) Register 🛛 🔘					
Trag columns here to group		Find:	[Search For] ···	Saved views: P	revious View	•	0	rag columns here to group		Find	[Search For] ···	Saved views: St	andard View	•
CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	AI	CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
	308		20.00	Mie	\$3,633,147	\$72,662,954		→ □	JOB		1.00	Lump Sum	\$5,643,071	\$5,643,071.8
	Prime Bond	PRIME BOND	1.00	Lump Sum	\$47,119.07	\$47,119.07		+	Prime Bond	PRIME BOND	1.00	Lump Sum	\$5,492.11	\$5,492.1
	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$295,371.61	\$295,371.61			Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$23,005.49	\$23,005.4
	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.00		+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.0
	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0.00		+	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0.0
	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	\$19,131.77	\$19,131.77		+	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	\$0.00	\$0.0
	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54		+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$3,280.16	\$3,280.
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,896.28		+	Job Management & Equipment	JOB MANAGEMENT & E		Lump Sum	\$125,896.28	\$125,896.2
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00		+	General Expense	GENERAL EXPENSE		Lump Sum	\$4,200.00	\$4,200.0
+	Direct Cost Add-On	DIRECT COST ADD-ON		Lump Sum	\$104,203.16	\$104,203.16		+	Direct Cost Add-On	DIRECT COST ADD-ON		Lump Sum	\$5,788.58	\$5,788.
+ 1	Mobilization	641 0 100		Lump Sum	\$11,909.51	\$23,819.02		+ 1	Mobilization	641 0 100		Lump Sum	\$11,909.51	\$11,909.
+ 2	Clearing & Grubbing	201 0102	10.00		\$3,793.70	\$37,936.97		+ 2	Clearing & Grubbing	201 0 102		Acre	\$3,793.70	\$37,936.9
3	Unclassified Excavation	202 0183		Cubic Yard	\$4.94	\$246,901.12		□ 3	Unclassified Excavation	202 0 183	50,000.00		\$4.79	
+ 3.1	Excavation	3.1		Cubic Meter	\$4.10	\$156,554.96		+ 3.1	Excavation	3.1		Cubic Meter	\$3.90	
+ 3.2	Embankment	3.2		Cubic Meter	\$2.13	\$90,346.16		+ 3.2	Embankment	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.1
□ 4	Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$681,696.99		*						

 On the CBS of the Training Job, click the row header on cost item 4 – Aggregate Base and press Ctrl+C to copy the cost item.

÷	□ 4	Aggregate Base	303 5912
	+ 4.1	Furnish & Haul Base Material	4.1
	+ 4.2	Finegrade Subgrade	4.2
	4.3	Install Aggregate Base	4.3
	+ 4.3.1	Place Aggregate Base	4.3.1
	+ 4.3.2	Blue Top Aggregate Base	4.3.2

- TIP When you copy a superior cost item, all of its subordinates are automatically copied.
- 6. On the CBS of the E101 Bid Wizard job, click the row header on the first blank register row, and press **Ctrl+V** to paste the cost item.

+ 1	Mobilization	641 0 100	1.00	Lump Sum
+ 2	Clearing & Grubbing	201 0 102	10.00	Acre
3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard
+ 3.1	Excavation	3.1	38,227.74	Cubic Meter
+ 3.2	Embankment	3.2	42,432.79	Cubic Meter

7. On the Attention dialog, select Adjust the pay rules and shift arrangements to match the destination and click OK.

6	Attention
	red one or more cost items to be copied and inserted as subordinates to m at CBS Position Code <job>.</job>
C Keep the	to adjust Pay Rules and Shift Arrangements of the copied cost items? original pay rules and shift arrangements pay rules and shift arrangements to match the destination
Never ask	me this question again OK Cancel

• You can see in the destination job's CBS that you've added the Aggregate Base cost item, along with its subordinate cost items and all cost and productivity detail

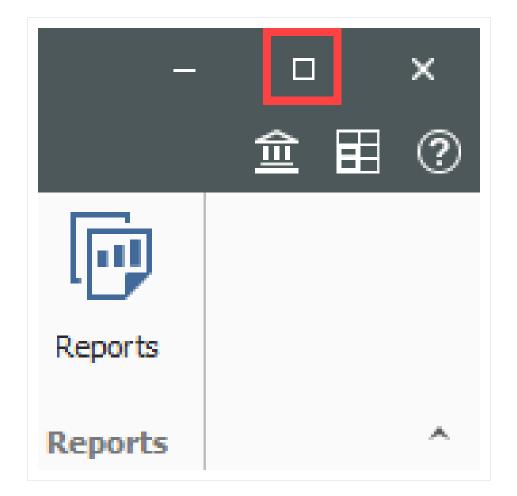
<u> </u>								s 🗉 - 🔜							
Setup Estimate	Quote Price Execution		Actions More Ac	tions		金田(File Setup Estima	ite Quol			ns Actions More Act	tions		金田
t Breakdown cture (CBS)	Workbook	Indirect Price	Breakdown cture (PBS)	e Scenario: mates	- Reports			Cost Breakdown Structure (CBS)		Kook Schedule Cash Flow		E Breakdown Jucture (PBS)	e Scenario: rnates	- Reports	
akdown Struc Res.		Indirect Cost Ov	rhead and Pr	Alternates	Reports		^			kbook Schedule	Indirect Cost Ov	erhead and Pr	Alternates	Reports	
	()-								()						
st Breakdown Structure	(CBS) Register D							Cost Breakdown Structu	re (CBS) Reg	ister O					
columns here to group		Find	: [Search For] …	Saved views:	Previous View	•	1	Drag columns here to group			Find	i: [Search For] …	Saved views:	Standard View	
CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	A	CBS Position Code	Description		Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
	JOB		20.00	Mie	\$3,633,147	\$72,662,954			308			1.00	Lump Sum	\$14,870,33	\$14,870,3
	Prime Bond	PRIME BOND	1.00	Lump Sum	\$47,119.07	\$47,119.07		+	Prime Bor	id	PRIME BOND	1.00	Lump Sum	\$12,328.94	
	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$295,371.61	\$295,371.61			Price % A	dd-On	PRICE % ADD-ON	1.00	Lump Sum	\$60,524.65	\$60,5
	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.00		+	Job Finan	cing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	
	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0.00		+	Indirect C	ost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	
	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	\$19,131.77	\$19,131.77			Direct Cos	t Escalation	DIRECT COST ESCALAT.	. 1.00	Lump Sum	\$0.00	
	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54		+	Indirect C	ost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$11,005.99	\$11,0
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,896.28		+	Job Mana	gement & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,8
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00		+	General E	xpense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,2
	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,203.16	\$104,203.16			Direct Cos	it Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$19,422.52	\$19,4
+ 1	Mobilization	641 0 100	2.00	Lump Sum	\$11,909.51	\$23,819.02		+ 1	Mobilizati	on	641 0100	1.00	Lump Sum	\$11,909.51	\$11,9
+ 2	Clearing & Grubbing	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97		+ 2	Clearing 8	Grubbing	201 0102	10.00	Acre	\$3,793.70	\$37,9
3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard	\$4.94	\$246,901.12		□ 3	Unclassifi	ed Excavation	202 0183	50,000.00	Cubic Yard	\$4.79	\$239,5
+ 3.1	Excavation	3.1	38,227.74	Cubic Meter	\$4.10	\$156,554.96		+ 3.1	Excavation	on	3.1	38,227.74	Cubic Meter	\$3.90	\$149,2
+ 3.2	Embankment	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.16		+ 3.2	Embankm	ient	3.2	42,432.79	Cubic Meter	\$2.13	\$90,3
□ 4	Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$681,695.99		→ □ 4	Aggregat	e Base	303 5912	45,000.00	Ton	\$15.15	\$681,6
+ 4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton	\$11.54	\$519,513.30		+ 4.1	Furnish 8	Haul Base Material	4.1	45,000.00	Ton	\$11.54	\$519,5
+ 4.2	Finegrade Subgrade	4.2	400,000.00	Square Yard	\$0.18	\$73,352.36		+ 4.2	Enegrad	e Subgrade	4.2	400,000.00	Square Yard	\$0.18	\$73,35
□ 4.3	Install Aggregate Base	4.3	45,000.00	Ton	\$1.97	\$88,831.33		□ 4.3	Install Ag	gregate Base	4.3	45,000.00	Ton	\$1.97	\$88,83
+ 4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton	\$1.55	\$69,716.92		+ 4.3.1	Place A	Aggregate Base	4.3.1	45,000.00	Ton	\$1.55	\$69,7
+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.05	\$19,114.42		+ 4.3.2	Blue Te	op Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.05	\$19,1
□ 5	Asphalt Concrete Hot Mix Type A	303 4263	35.000.00	Ton	\$42.62	\$1,491,580,59									

TIP

You can also drag and drop cost items from one CBS to another instead of copying and pasting.

TIP Copied cost items are considered Job Overhead until they are assigned to a pay item

8. To go back to your full screen view of the E101 Bid Wizard job, select the maximize icon.



10.5 CBS BID WIZARD

You can also use the Bid Wizard to add cost items while you are in the CBS Register. The following steps walk through using the CBS Bid Wizard.

Step by Step — Use the CBS Bid Wizard

- 1. Click the **File** tab from the Estimate landing page and open the **E101 Bid Wizard** job you created.
- 2. From the Estimate tab, select Cost Breakdown Structure (CBS).
- 3. Create a new cost item by typing New in the Description column on the bottom row of the CBS
- 4. Highlight the **New** row.

-					
		New			Each
+	4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard
+	4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton
	4.3	Install Aggregate Base	4.3	45,000.00	Ton
+	4.2	Finegrade Subgrade	4.2	400,000.00	Square Yard
+	4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton
	4	Aggregate Base	303 5912	45,000.00	Ton

5. To open the CBS Bid Wizard, click the **Bid Wizard** icon on the **More Actions** tab.

6	- -									
File	Setup	Estim	ate Quote	Price	Execution	System	Integrations	Actions	More Actions	
æ	Schedule Select	ion	∢▶ Swap -	11 в	id Wizard	∑ Unit /	Total Confirmation			+
e ا	Unschedule Sele	ection	😑 Remove 👻	iii S	ubtotal Calculator	💮 Refre	sh Benchmarks			
+ × - ÷	Calculate Plug D	ays	C Update +		uantity Checking	(+) Add Q	Juote	Add Level One Cost Items *	Add Subordinate Cost Items *	Import / Update CBS 🔻
	Schedule		Batch Operations			Tools			Data Source	

- The Bid Wizard window opens
- 6. Click in the **Source Job** column on the New cost item row.

Place Aggregate Base	45,000.00	Ton	[Select Source Job]
Blue Top Aggregate Base	400,000.00	Square Yard	[Select Source Job]
New	1.00	Each	[Select Source J 👻

- 7. From the Source Job drop-down list, select **Training Job**.
- 8. Scroll to the right of the Source Job column and click in the **Source CBS Position Code** column on the New Cost item row.
 - A source CBS Register window appears
- 9. Select CBS position code 5 Asphalt Concrete Hot Mix Type A from the register.

	CE Po	asition Code 🗎	Description		Really Optional Code	Unit of Measure	Forecast (T/O) Quantit
	÷	4.2	Finegrade Subgrade		4.2	Square Yard	
		4.3	Install Aggregate Bas	e	4.3	Ton	
	Ð	4.3.1	Place Aggregate Ba	ase	4.3.1	Ton	
		4.3.2	Blue Top Aggregate	e Base	4.3.2	Square Yard	
÷		5	Asphalt Concrete Ho	t Mix Type A	303 4263	Ton	
	Đ	5.1	Furnish & Haul Hot Mi	x	5.1	Ton	
	÷	5.2	Install Hot Mix Type A	4	5.2	Ton	
		6	36 Inch RCP Culvert	Class III	413(B) 0464	Linear Feet	
	÷	6.1	Furnish RCP Materials	3	6.1	Linear Feet	
	÷	6.2	Excavate RCP Trench	1	6.2	Cubic Yard	
	÷	6.3	Install RCP Pipe		6.3	Linear Feet	
	Ð	6.4	Backfill RCP Pipe		6.4	Cubic Yard	
							+

- 10. Click **OK**.
- 11. Click **Finish** on the Bid Wizard.
 - An Attention prompt displays, asking if you want to make adjustments
 - Keep the default options selected: Make Adjustments according to their quantity drivers and cost drivers and Adjust the pay rules and shift arrangements to match the destination
- 12. Click **OK**.

	Attention
ou have ordered Azard.	one or more cost items, or just their details, to be copied by the Bid
Do you want to quantities :	adjust cost items and cost details based on the destination
O Do not make	adjustments
Make adjustn	ients according to their quantity drivers and cost drivers
Do you want to	adjust Pay Rules and Shift Arrangements of the copied cost items?
⊖ Keep the orig	inal pay rules and shift arrangements
Adjust the pa	y rules and shift arrangements to match the destination
Never ask me	this question again
	OK Cancel

- You can see that cost item 5 and its subordinates are now imported into your existing job.
- You could choose a new name for the cost item, or name it Asphalt Concrete Hot Mix Type A to match the original cost item

	4.3	Install Aggregate Base	4.3	45,000.00	Ton
+	4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton
+	4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard
/ E	5	Asphalt Concrete Hot Mix Type A		1.00	Each
+	5.1	Asphalt Concrete Hot Mix Type A Furnish & Haul Hot Mix	5.1	1.00 1.00	Each Ton
			5.1 5.2		

10.6 SNAPSHOTS

A job snapshot is a copy of an estimate that provides read-only access to the job as it existed at a specific point in time. You can now filter the Snapshot register to jobs containing snapshots.

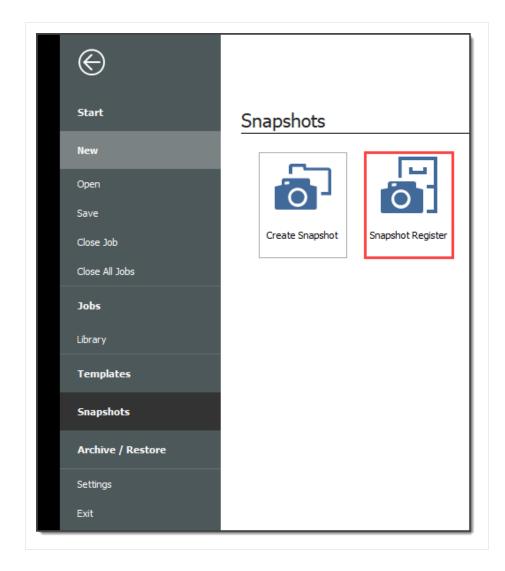
The Snapshot register has some additional columns as well. In addition to the Code, Description, Last Saved, and Version column, the Snapshot register contains all fields that are present on the Jobs register that provides you with an easier way to group, sort, filter, and find the jobs you need.

10.6.1 Snapshot Register

The Snapshot Register is where you will view individual snapshots for specific jobs.

Step by Step — Snapshot Register

- 1. Click the File tab to open the Backstage View. In the panel, select Snapshots.
- 2. From the Snapshots form, select the Snapshot Register tab.



3. To view individual snapshots for specific jobs, click the is icon next to the desired job to display the list of snapshots.

	Co	de	1	Description
\rightarrow	+	E101 - Training	Job KL	Sample Training Job
	+	Training Job		Training Job - Maricopa County No. TM2924

10.6.2 Creating a New Job Snapshot

Step by Step — Create a New Job Snapshot

You can create a Job Snapshot from an existing Job.

1. From the Snapshots form, select the **Create Snapshot** tab.

📮 Print	ें: Load	🐻 Create Job Snapshot	14	Y Y	C Refresh		
neview	ें Edit	Delete All Job Snapshots	× .		👘 Create New Job from Snapsho		
	鹶 Delete			ter to Jobs Clear h Snapshots Filter			
Print		Edit		View		Tools	
Snapshot R							
Drag columns	here to group						
Code	-	Description		Last Saved	Version	In Use	Status
→ + E101	- Training Job	KL Sample Training Job		11/12/2019 2:23:1	19.2.0.27	✓	Bidding
- LI01							

2. If an existing job is open select **Save**, if you haven't already done so.

9	Attention
	will not be stored in the snapshot. Save the job a snapshot?
E101 - Tr	ining Job KL
	OK Cancel Unselect All

- 3. A New Job Snapshot [Job Code Here] dialog box appears. From there, you can add a Snapshot comment.
 - If you want to Include all Attachments that have been stored in the Job Folder with this Snapshot, select the check box, otherwise uncheck the box.
 - If you want to Use Job's current User Access restrictions for this Snapshot, select this radio button.
 - If you want to Remove User Access restrictions for this Snapshot and allow read-only access to all users, select this radio button
 - If you want to Specify User Access restrictions for this Snapshot (default selection), select this option
 - Then use the Add and Remove buttons to specify user access using Active Directory.

9	New Job Snapshot [E101 - Training Job KL] — 🗆 X
Job:	E101 - Training J Job Description: Sample Training Job
Snapshot Comment:	<add comment="" here=""></add>
\rightarrow	Include all Attachments that have been stored in the Job Folder with this Snapshot
	User Access Use Job's current User Access restrictions for this Snapshot Remove all User Access restrictions for this Snapshot Specify User Access restrictions for this Snapshot User - karen.loftus@ineight.com user - paul.trippi@ineight.com Remove
	OK Cancel

(Users with current access to the job default onto the list.)

- 4. Click OK to create the snapshot.
- 5. A pop-up indicates when the snapshot has been created.

	Success!
ſ	Successfully created Job Snapshot for Job: 'E101 - Training Job KL'.
	Never offer this help again
L	ОК

10.6.3 Editing a Job Snapshot

Step by Step — Edit a Job Snapshot

- 1. From the Snapshot Register, click the 🗉 icon next to the desired job to display snapshots.
- 2. Right-click on the individual snapshot you want to edit and select Edit.

→	-	E101	- Trainin	g Job KL	Sample Training Job	
			Snapsh	ot Comment		Date
	+	→ Traini	<	<u>L</u> oad		11/13
		Iran		<u>E</u> dit		
			്ര	<u>D</u> elete		
			c P	<u>C</u> reate Ne	ew Job from Snapshot	
_						

- 3. The same sort of dialog box opens up as when you created the Snapshot. In this case, from the Edit Job Snapshot [Job Code Here] dialog box, modify the Snapshot Comment and the User Access options as needed.
 - If you want to Include all Attachments that have been stored in the Job Folder with this Snapshot, select the check box. Otherwise, uncheck the box
 - If you want to Use Job's current User Access restrictions for this Snapshot, select this radio button
 - If you want to Remove User Access restrictions for this Snapshot and allow read-only access to all users, select this radio button
 - If you want to Specify User Access restrictions for this Snapshot (default selection), select this option
 - Then use the Add and Remove buttons to specify user access using Active Directory. (Users with current access to the job default onto the list.)
- 4. Click **OK** to update the snapshot.

10.6.4 Deleting a Job Snapshot

Step by Step — Delete a Job Snapshot

- 1. From the Snapshot Register, click the 🖩 icon next to the desired job to display snapshots.
- 2. Right-click on the individual snapshot you want to delete snapshots from and select **Delete**.

	Co	de		1	Description
\rightarrow	-	E101	- Trainin	ig Job KL	Sample Training Job
			Snapsh	ot Comment	🚊 🛛 Date Crea
	+	→ Train	<add u<br="">Comm ing Job</add>	ndated.com Load Edit	201
				Creat	e New Job from Snapshot

3. Click OK

6	Delete Job Snapshot										
Are you sure you want to delete this Job Snapshot?											
<add< td=""><td>d updated comment [E101 - Training Job KL_201911</td></add<>	d updated comment [E101 - Training Job KL_201911										
	OK Cancel Unselect All										

Alternatively, you can delete all Job Snapshots by clicking **Delete All Job Snapshots** from the Actions tab.

9	-							
File	Setu	ıp Estin	nate E	Execution	Syste	m	Actio	ns
📑 Pri	nt	ें, Load	🔂 Crea	te Job Snap	shot		1	
🗟 Pre	eview	े ूर Edit	2 Delet	Delete All Job Snapsh				
		💣 Delete					pand / apse *	Filter to with Sna
Pri	nt		Edit	t				View
Snap	shot R	egister 🛛						
_						_		

10.6.5 Loading a Job Snapshot

When you load an existing Snapshot, it loads into Estimate as any other job.

Step by Step — Load a Job Snapshot

- 1. Click the File tab to open the Backstage View, then select **Snapshots**.
- 2. From the Snapshots form, select the **Snapshot Register** tab.
- 3. On the Snapshot Register, click the e icon next to the desired job to display the list of snapshots.
- 4. Right-click on the individual snapshot you want to load and select **Load**.

	Co	de	<u>=</u>	Description			Last Saved		Version		In Use	
÷	-	E101	- Training Job KL	Sample Training Job			11/13/2019 8:25:3		19.2.(0.27		
			Snapshot Comment	<u> </u>	Date Created			Version				
			<add com<="" td="" updated=""><td>ment here></td><td>11/13/2019 3:3</td><td>1:54</td><td>PM</td><td>19.2.0.27</td><td></td><td></td><td></td></add>	ment here>	11/13/2019 3:3	1:54	PM	19.2.0.27				
		\rightarrow	Comment #2		11/13/2019 3:5	0.20	Load	10 2 0 27				
	+	Train	ing Job	Training Job - Maricopa Co	Maricopa County No. TM292			2 -				
							<u>E</u> dit					
						8	<u>D</u> elet	e				
						r n	Creat	e New Job f	rom Sr	apsho	t	

To identify a snapshot in Estimate as a read-only snapshot:

- The job name is preceded by the label SNAPSHOT: centered on the top of the toolbar
- A red banner shows the specific snapshot information at the bottom of the screen

NOTE A snapshot can be modified, but it cannot be saved as it is read-only.

Print	Estimate Quote	Price		System	Actions Mor	e Actions		Assembly	÷. n	source			E CBS Tree	<u>命</u>	
											14	7 6			
Q Preview	🙁 Delete 🛛 💼 Paste		Split by Cost Type	- Outdent	恩 Unlink Field	E Subordinate C		Subordinate Ass	embly TER	esource Assembly	Expand /	Filter Clear	Expand	JBS Tree	
Export to Excel	Cut + Fill Dowr	n 😋	Toggle Suspended			Dependent Co	ost Item				Collapse *	* Filter			
Print		E	dit		Workbook			Insert				View			
ost Breakdown	Structure (CBS) Register	0													
BS Tree (Filter	Mode) ×		ag columns here to	21010						Find: Searc	h Eor1	Saved view	s: Previous	Vew	-
		_		a o o p											
	lescription		CBS Position Code	E. Descrij	otion		Forecast (T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated	Allocation	Currency	Cost Adjustment	Optio Code
	08						Quantity					Jource			code
	trime Bond	-	•	JOB			20.00	Mile	\$292,094.58	\$5,841,891.55			U.S. Dollar		
	rice % Add-On		+	Prime	Bond		1.00	Lump Sum	\$46,950.91	\$46,950.91			U.S. Dollar		PRIM
	ob Financing		+	Price	% Add-On		1.00	Lump Sum	\$293,858.20	\$293,858.20			U.S. Dollar		PRIC
	ndirect Cost Escalation		+	Job F	inancing		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		FINA
	Prect Cost Escalation		+	Indire	ect Cost Escalatio	n	1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		INDIF
	ndirect Cost Add-On		+	Direc	t Cost Escalation		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		DIRE
	ob Management & Equipment General Expense		+	Indire	ect Cost Add-On		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar	-	INDIF
	eneral expense lirect Cost Add-On		+	Job M	lanagement & Eq	uipment	1.00	Lump Sum	\$157,096.28	\$157,096.28			U.S. Dollar		308 M
	Inhiization		+	Gene	ral Expense		1.00	Lump Sum	\$4,200.00	\$4,200.00			U.S. Dollar		GENE
	learing & Grubbing		+	Direc	t Cost Add-On		1.00	Lump Sum	\$104,301.10	\$104,301.10			U.S. Dollar		DIRE
	Indassified Excavation		+ 1	Mobil	ization		1.00	Lump Sum	\$11,909.51	\$11,909.51			U.S. Dollar	✓	6410
	iggregate Base		+ 2	Clear	ing & Grubbing		10.00	Acre	\$3,918.50	\$39,184.97			U.S. Dollar		2010
	sphalt Concrete Hot Mix Ty		□ 3	Uncla	ssified Excavatio	n	50,000.00	Cubic Yard	\$4.68	\$233,915.81			U.S. Dollar		202.0
> 📫 6 3	6 Inch RCP Culvert Class III		+ 3.1	Exc	avation		50,000.00	Cubic Yard	\$3.00	\$149,922.88			U.S. Dollar		3.1
	0 Inch PVC Force Main (SD		+ 3.2	Emb	ankment		50,000.00	Cubic Yard	\$1.68	\$83,992.94			U.S. Dollar		3.2
	4 Inch PVC Gravity Sewer (□ 4	Aggr	egate Base		45,000.00	Ton	\$15.40	\$692,928.99			U.S. Dollar		303 5
	Foot Diameter Manhole		+ 4.1	Furr	hish & Haul Base Mat	terial	45,000.00	Ton	\$11.54	\$519,513.30			U.S. Dollar		4.1
	tructural Excavation & Backfil		+ 4.2		grade Subgrade			Square Yard	\$0.19	\$75,848.36			U.S. Dollar		4.2
	iteel Reinforcement tetaining Wall		-												

Exercise 10.1 — Data Reproduction

Now that you have learned how to utilize the Bid Wizard, complete the following steps using the Bid Wizard and Copy & Paste features.

- 1. Open the Bid Wizard by clicking the Bid Wizard icon from the More Actions tab.
- 2. Choose the **Create a new job** radio button.
- 3. Type **BW Exercise** (with your initials) in the **New Code** field and type **Exercise** in the Description field.
- 4. Choose Select cost items.
- 5. For all selections, choose **Copy from source job**.
- 6. Select the Also copy all non-utilized resources checkbox.
- 7. Select **Copy from source job** under Unassigned Cost Items and Markup, and the Copy Markup box is automatically selected.
- 8. Find and select **Training Job** and click **OK**.
- 9. Use the Toggle Include All button to exclude all selections.
- 10. Select the checkboxes to include Cost Items 4-7.
- 11. Click **Finish** to add the new job.
- 12. Select Adjust the pay rules and shift arrangements to match the destination.
- 13. Open the **CBS** to see the cost items that were brought in.

14. Open the Infra Job Copy with your initials that you created earlier in this lesson.

15. Copy **Cost items 8 and 9** and paste them into the BW Exercise job.

You should end up with the following results

CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure
+	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum
+	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum
+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum
+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum
□ 1	Aggregate Base	303 5912	45,000.00	Ton
+ 1.1	Furnish & Haul Base Material	4.1	45,000.00	Ton
+ 1.2	Finegrade Subgrade	4.2	400,000.00	Square Yard
■ 1.3	Install Aggregate Base	4.3	45,000.00	Ton
+ 1.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton
+ 1.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard
2	Asphalt Concrete Hot Mix Type A	303 4263	35,000.00	Ton
+ 2.1	Furnish & Haul Hot Mix	5.1	35,000.00	Ton
+ 2.2	Install Hot Mix Type A	5.2	35,000.00	Ton
3	36 Inch RCP Culvert Class III	413(B) 0464	<u>1,024.00</u>	Linear Feet
+ 3.1	Furnish RCP Materials	6.1	1,024.00	Linear Feet
+ 3.2	Excavate RCP Trench	6.2	1,858.56	Cubic Yard
+ 3.3	Install RCP Pipe	6.3	1,024.00	Linear Feet
+ 3.4	Backfill RCP Pipe	6.4	1,587.20	Cubic Yard
□ 4	10 Inch PVC Force Main (SDR21)	800 0220	12,000.00	Linear Feet
+ 4.1	Furnish 10 Inch PVC Materials	7.1	12,000.00	Linear Feet
+ 4.2	Excavate-Install-Backfill 10 Inch PVC	7.2	12,000.00	Linear Feet
5	24 Inch PVC Gravity Sewer (SDR35)	800 0330	3,000.00	Linear Feet
■ 5.1	Excavate 24 Inch PVC	8.1	3,000.00	Linear Feet
+ 5.1.1	Excavate 24 Inch PVC 0-6 ft Depth	8.1.1	1,390.00	Cubic Yard
+ 5.1.2	Excavate 24 Inch PVC 6-10 ft Depth	8.1.2	3,610.00	Cubic Yard
+ 5.2	Furnish & Install 24 Inch PVC	8.2	3,000.00	Linear Feet
+ 5.3	Backfill 24 Inch PVC	8.3	4,520.00	Cubic Yard
6	4 Foot Diameter Manhole	800 0400	16.00	Each
+ 6.1	Furnish 4 ft Manhole Materials	9.1	16.00	Each
+ 6.2	Excavate-Install-Backfill Manhole	9.2	16.00	Each

Congratulations, you have completed this exercise!

Lesson 10 Review

- 1. From the New option on the Backstage View, which of the following options are available for creating a new job? (Select all that apply)
 - a. Scratch
 - b. Template
 - C. Import
 - d. Existing Job
 - e. Historic
 - f. Bid Wizard
- 2. Which of the following job reproduction options lets you pick and choose which cost items you want to import into your new job?
 - a. Template
 - b. Bid Wizard
 - C. Existing Job
 - d. Archive
- 3. Which of the following options allows you to add cost items from another project when working in the CBS Register?
 - a. Bid Wizard
 - b. CBS Bid Wizard
 - **C**. Template
 - d. Existing Job

Lesson 10 Summary

As a result of this lesson, you can:

- Create a job from an existing job or template
- Create a template

- Reproduce estimate data using the Bid Wizard
- Reproduce estimate data using copy/paste
- Add cost items to a job using the CBS Bid Wizard
- Utilize the Snapshot function

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LESSON 11 – EXCEL INTEGRATION

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Export data from InEight Estimate to Excel
- Link a field in InEight Estimate to Excel
- Update a linked InEight Estimate field with Excel data

Lesson Topics

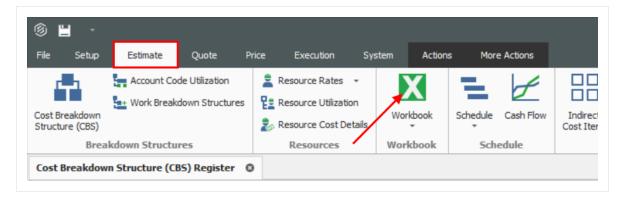
11.1 Linking to Excel	178
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11.1 LINKING TO EXCEL

11.1.1 InEight Estimate Workbook

Every job has its own Excel workbook embedded within it for doing side calculations and take-offs. You can link your calculations to fields in InEight Estimate to automatically update them into your estimate. When you create a new job from scratch, the Library Master Workbook is copied to create a new embedded Excel workbook for the job.

The workbook comes with some pre-defined take-off and analysis worksheets, or you can create your own. Simply open the appropriate worksheet, plug in your values, and Excel will calculate your results. To open your job's workbook, select the Estimate tab, then click on the Workbook icon under the Workbook section.



• The embedded Excel workbook for the job opens.

File Home Insert Pa	ge Layout v 10	Formulas	Data	Review	View ab w	PDFescape I	esktop Cre	, v	Tell me	what you wa	nt to do	Trai
aste • ≪ Format Painter B I	<u>u</u> • ⊞ •	<u>ى</u> - <u>A</u> -	= =	-	≣ 🖽 №	lerge & Center	- 5 -		•.0 .00 00 •.0	Conditiona Formatting		
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+ × InEight × = ESTIMATE	C	provide a	quick an	d easy wa	to perf	H lined Take O orm Take O iption of ea	f for thing	s like pip		. These wo	orksheets	
Take Off & Analysis Worksheets		Click on Table of Contents for a description of each worksheet.										
Instructions:		Once you have established links between Excel and Estimate, you can update all linked fields by choosing Tools > Workbook > Refersh links in Estimate.										
		You can copy your existing worksheets into this workhoods and link to those cells, yoo. The only requirement to link to a cell is that the cell must be named using Excell's naming function (huset > Hume). The Muster Workhook in Excellanta's Library part cepted into each every Job you create. To make changes to the workhook that will enclosely into each every lob you create on the Muster.										
Table of Contents		Workbook	for editi	ng by cho	sing Lib	t copied inte rary > Work	book in E	stimate.		•		
2 0 a		the worksh					vorksnee	is, red life	to deleti	e urenî by n	gnt clicki	ig or
Instructions	Table of Con	tents A_	Haul Cos	t B_Ha	ıler Calcı	ilator C_	Haul Take	off D	_Product	ion Rate Ca	lculator	8

11.1.2 Linking to and from Excel

InEight Estimate's linking capabilities with Excel can be done in one of two ways. A field in InEight Estimate can be populated with a value from Excel, or a cell in Excel can be populated with the data from an InEight Estimate field. This two-way linking functionality allows you to make quick work of complex chores to perform spreadsheet-based take-off or formula-driven analysis.

6	36 Inch RCP Culvert Class III	413(B) 0464	1,024.00 Linear Feet
6.1	Furnish RCP Materials	6.1	1,024.00 Linear Feet
+ 6.2	Excavate RCP Trench	6.2	1,858.56 Cubic Yard

The following example walks through how to link a simple take-off calculation into InEight Estimate from Excel. It is a take-off to determine the size of a concrete foundation.

Step by Step — Link Estimate to Excel

- 1. Open the **Training** Job and from the Estimate tab, open the **CBS Register**.
- 2. For this example, create a new cost item in the blank row at the bottom of the CBS register and name it **Concrete Foundation**.

Concrete Foundation	1.00	CY

- 3. Open the job's Excel workbook from the Estimate tab, by selecting the Workbook icon.
- 4. In the workbook, create a new worksheet named **Concrete Take-off** and enter the following fields:

	A	В	С	D	E	F	G
1	Concrete 7	Take-off					
2							
3	Length	10	yards				
4	Width	10	yards				
5	Height	0.5	yards				
6							
7							
8							
9							
10							
11							
12							
	< • •	Instruc	tions	Table of Co	ntents	Concrete T	ake-Off

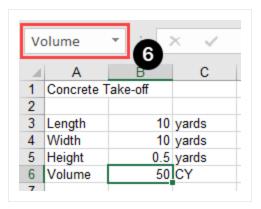
5. Create a new row to calculate the total cubic yards by factoring the length, width, and height quantities.

1	Α	В	С
1	Concrete 7	ake-off	
2			
3	Length	10	yards
4	Width		yards
5	Height	0.5	yards
6	Volume	=sum(B3*E	B4*B5)
7			

• Your Volume Total should be 50 cubic yards

	Α	В	С
1	Concrete T	ake-off	
2			
3	Length	10	yards
4	Width	10	yards
5	Height	0.5	yards
6	Volume	50	CY
7			

6. InEight Estimate will only link to named fields in Excel. Click in the field you want to name (B6), then click in the Field Name window and type **Volume**.



- 7. Go back to the CBS Register and right click on the Concrete Foundation cost item **Forecast (T/O) Quantity** field.
- 8. From the resulting right click menu, select Link this field to Excel.
 - You can also link the field by selecting the field and then selecting Link Field from the Actions tab

Find

		Training Job - Estimate							
Execution	System	Integrations	Actions	More Actions	;				
n	➡ Indent	👗 Link Field	• 🗮 Cost Item	n	- Assembly	🇞 Resource			
	🖛 Outdent	🖧 Unlink Field	🔚 Subordina	ate Cost Item	🔁 Subordinate Assembly	Resource Assem			
Suspended			🕂 Depender	nt Cost Item					
		Workbook			Insert				

	Optional Code	Forecast (T/O) Quantity		t of asure	Unit Cost	Total Cost (Forecast)			
	06420	1.00	Lur	np Sum	\$2,100.00	\$2,100.00			
	08210	1.00	Lur	np Sum	\$1,000.00	\$1,000.00			
	096 4 0	1.00		no Sum	\$1,800.00	\$1.800.00			
	12510	1.00	Ľ2	<u>O</u> pen					
	15300	1.00	Ð	<u>N</u> ew					
	16510	1.00	\otimes	<u>D</u> elete					
	1500 0100	1,000.00	℅	Cu <u>t</u>					
	1500 0200	200.00	٦	Cop <u>y</u>					
	1600 0230	1,000.00	ß	<u>P</u> aste					
e	CO1	1.00	+	Fill Down					
	UNASSIGNED DIRECT C	1.00	Д.	Link this field to	Excel				
osts	UNASSIGNED	1.00		UnLink from Ex					
	UNASSIGNED	1.00	-	 Indent					
	UNASSIGNED	1.00	-	Outdent					
	UNASSIGNED	1.00		Outdent					
		1.00		Insert					
the Water		1.00		Insert Su <u>b</u> ordin					
		1.00	-	Insert Depende					
		1.00	근	Insert Cost Item					
		1.00	귿	Insert Cost Item	n Assembly as <u>S</u>	ubordinate			
			\mathbb{N}	Split					

- 9. On the Link to Excel dialog, select the **Update InEight Estimate field from Excel** radio button.
- 10. In the Field to link window, select **Volume** (you may need to click the Refresh is button for the field name to display).

Link to When linking to Exce	o Excel			
				×
Excel update an Esti Estimate update a n	imate field or h	ave the d		ta in
Opdate Estimate	e Field from Exe	cel	¢۳	
O Update Excel Ce	ll from Estimat	e	63	
Field to Link: For	ecast (T/O) Qua	antity		
O_Item 1VolCY_Str. O_Item2AreaSF_St O_Item2VolCY_Str. O_Item3AreaSF_St O_Item4AreaSF_St O_Item4AreaSF_St O_Item5VolCY_Str. O_Item5VolCY_Str. O_TotAreaSF_Struct Volume	ructuralConcTaie ucturalConcTaie ructuralConcTaie ucturalConcTaie ructuralConcTaie ucturalConcTaie ucturalConcTaie ucturalConcTaie cturalConcTaie	keOff Off Off Off Coff Coff Off Off		<
Prorate to Super	rior Item Quant	ity		
	es by Workshe	et		
Group Cell Name	-			
Group Cell Name	resh es	Pick from	n Excel	

- 11. Click **OK**.
 - The Forecast Quantity field for Concrete now is linked to the Volume field in Excel and populates with the take-off quantity (50)

CBS	Description	Forecast	Unit of
Position Code 🗎		(T/O) Quantity	Measure
+ 26	Concrete Foundation	50.00	СҮ

11.1.3 Update Links

When data in InEight Estimate or Excel changes, you can quickly update all links, in just the currently active job or in all open jobs. Simply select one of the following options from the Workbook drop-down list on the Estimate tab.

Estin	nate Quote Pr	rice Execution	Syste	m	Actio	ns Mor	e Actions		1
110	bunt Code Utilization k Breakdown Structures	Resource Rates	n	Worl	doook	Schedule	Cash Flow	Indirect Cost Items	ات م ا
akdown S vn Struct		↓	Open Updat		b From Wor	kbook	ire		
de 🚊 Description			Option Code	*23 € ²³ €**	Updat	e Workbool	lobs From W k From Curre ks From All C	nt Job	t c as
	Prime Bond Price % Add-On		PRIME	-	Delete	Broken Lin	ks in All Ope		ıp ump

11.2 BUILT-IN SPREADSHEET

Most of the time, a cloud-based deployment of the Microsoft Office products, including Excel, are installed on new laptops or machines as the default installation option for Office 2016. Estimate's Excel integration relies on an on-premise (according to Microsoft) installation of the Microsoft Office products.

Estimate supports the option to use spreadsheet control for those that do not have the on-premises version of Microsoft Excel installed. You can switch between the Embedded workbook and the spreadsheet control from the Configuration Tool.

This option lets you use the functionality of the embedded workbook without having an on-premises installation of Microsoft Excel.

Follow the step by step below to change to the **Built-In Spreadsheet** option.

Step by Step — Built-In Spreadsheet

1. From the Windows Start Menu, search for **Configuration Tool**. The Estimate Configuration window opens.

NOTE If Estimate has been directly installed on your machine, the Estimate Configuration window will appear. If you cannot find your Estimate Configuration, contact support.

- 2. Select the **File** tab.
- 3. Under the Spreadsheet data box, select the **Spreadsheet Application** drop-down arrow.
- 4. Select the option Built-In Spreadsheet.

Det D			010	0					
Vetwork Database F	10 P	PI	SAP	Support					
Attachment Settings									
Enable Linked A (Inked attachment)	ttachmen nts are n	ts Onl ot sav	ly ed inside	Estimate jobs)					
 Enable Linked A ljob folder attach 					3				
Location for Job Fok	der Attac	hment	8:						
C:\Users\Suntha Ja	sin'AppD	ata'\L	ocal\InE	ight\Clients\10	200,21.4	\$004\B	DBUILD	ov/	1
Archive Settings									
Default Format:	Estimate	Archiv	e File - B	ACPAC				~	1
Spreadsheet Application:									
Spreadsheet Application:		Built-in Spreadsheet V Microsoft Excel							
Spreadsheet Applic		Micros	oft Exce	4					
Spreadsheet Applic		Micros		4	_				ŀ
Spreadsheet Applic		Micros	oft Exce	4	-				
Spreadsheet Applic		Micros	oft Exce	4					
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Spreadsheet Applic		Micros	oft Exce	4					
Spreadsheet Applic		Micros	oft Exce	4					
Spreadsheet Applic		Micros	oft Exce	4					

11.3 CURRENCY IN JOB TRACKING EXCEL IMPORT

The currency function lets you import actuals in different currencies while you work in multiple currencies within a job.

Settings: Previous	
Job Tracking Column	Excel Column
- Notes	
Job Tracking Column	Excel Column
Note	None Selected
- Currency	
Job Tracking Column	Excel Column
Currency	None Selected
 Expense Fields 	
Job Tracking Column	Excel Column
Resource	None Selected
Description	None Selected
Quantity	None Selected
Unit of Measure	None Selected
Teg 1	None Selected
Tag 2	None Selected
Teg 3	None Selected
Note	None Selected
Bilable	None Selected
Commitment	None Selected
- Expense Costs	

Lesson 11 Review

- 1. The Export to Excel feature is available on all register forms in the system and allows you to export the data currently displayed on a register form to an Excel worksheet.
 - a. True
 - b. False
- 2. In order to link an Excel field to InEight Estimate, the Excel field must be:
 - a. Named
 - b. Highlighted
 - C. Tagged
 - d. Selected

Lesson 11 Summary

As a result of this lesson, you can:

- Export data from InEight Estimate to Excel
- Link a field in InEight Estimate to Excel
- Update a linked InEight Estimate field with Excel data



LESSON 12 – SCHEDULE INTEGRATION

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Set up scheduling options
- Update schedule from InEight Estimate
- Update InEight Estimate from schedule
- Manage changes between estimate and schedule

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12.1 PRIMAVERA

12.1.1 Scheduling Options

Prior to sending information from InEight Estimate to Primavera, you need to make sure the proper settings are in place.

12.1.1.1 Job Properties Schedule Tab

Primavera scheduling options are configured on the **Setup > Job Properties > Schedule** tab.

			Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Fold	ter Tags	Competitors	Pricing	Schedule	Cash Flow
ntegrated S	chedule:		Primavera	•	📃 Alwa	ays use Plug Day	s when up	odating Es	timate from the	schedule		
chedule Cu	rrency:		U.S. Dollar	•								
Cost Item R	oll Up	Login Options	Mapping Options	Resources	Expense Co	osts Actuals	Tags	Activity	Calendars			
will be To for buttor	ce immed or the 'C	ited when a chan iate recalculation	is for scheduling ; ge is made to the n of Plug Days for ys' command or	scheduled days	of a subordi	nate. Recalculate Plug						

- At the top of the Schedule tab, the Integrated Schedule must be set to Primavera
- As a default, the Always use Plug Days when updating InEight Estimate from the schedule checkbox is not selected (on a job by job basis, this box can be checked later for jobs in which an estimator does not want updates from Primavera to change the duration and therefore the cost of your cost items in InEight Estimate)
- On the Schedule tab, there are several sub-tabs that need to be set up correctly to produce

correct data behavior and ensure the correct passing of data to Primavera

Job Proper	ties 🛛			
Overview	Security	Cover Sheet	Cost Basis	Minority Setup
Integrated Schedule C			Primavera U.S. Dollar	•
Cost Item	Roll Up	Login Options	Mapping Option:	s Resources

Step by Step — Login Options Tab

- On the Schedule > Login Options tab of Job Properties, select the Use these login settings radio button.
 - If pre-defined login settings were required, the Use pre-defined login settings radio button would be selected instead
 - The Instance will remain set to -Default-
 - Database selection will be **pmdb** during training.
- 2. Type your user name in the User Name field.
- 3. Type your password into the Password field.
 - You will have your own login settings specific to your company

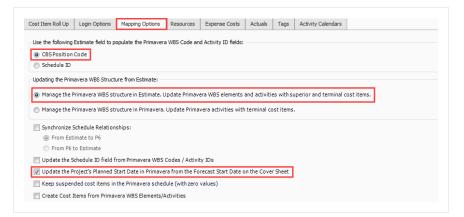
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule
Integrated	Schedule:	[Primavera	•	E Alwa	ays use Plug Day	s when updating E	stimate from the	e schedule	
Schedule C	Currency:	[U.S. Dollar	-						
Cost Item	Roll Up	ogin Options	Mapping Optic	ons Resources	Expense Co	osts Actuals	Tags Activity	Calendars		
Ouse these login settings: Instance:		Instance:	-Default-		•					
			Database:	pmdb		•				
			User Name:	admin						
			Password:	*************	*********					
User	ore-defined l	oginsettings:	[~				

12.1.1.2 Mapping Options Tab

The Mapping Options tab contains options critical to downstream applications. It will have the following settings selected by default:

- 1. The **CBS Position Code** is selected as the field to populate the Primavera WBS Code and Activity ID fields.
- 2. The **Manage the Primavera WBS structure in InEight Estimate...** radio button is selected for the initial push from InEight Estimate to P6.
 - This means the WBS structure in Primavera will be controlled by the structure of superior and terminal cost items in InEight Estimate.
 - Selecting the other option would cause the WBS structure to be controlled in Primavera. Only terminal cost items would be sent from InEight Estimate to Primavera and all hierarchal structure (WBS Elements) would be created in Primavera manually
 - This option can be changed later, on a job-by-job basis.
- 3. The **Update the Project's Planned Start Date in Primavera from the Forecast Start Date** option is checked.
 - This will automatically pull the Forecast Start Date from the Job Properties > Cover Sheet tab to become the Planned Start Date in Primavera.

NOTE You should double-check to make sure the right Start Date is defined on the Job Properties > Cover Sheet tab.



12.1.1.3 Resources Tab

The Resources tab dictates how resources are mapped between InEight Estimate and P6.

	Section	Name
1	Update Primavera Resources from Estimate	 Provides options for sending InEight Estimate resources to Primavera. Typically, you would select the Update scheduled resources only option to send only resources that are employed on cost items The Update all of this job's resources option updates Primavera with all of the resources in your project's Resource Rate Register
2	Map Resource Types to Primavera	Specify whether your resources will import into Primavera as Resources or Roles.
3	Update Primavera Budgeted Units when using Plug Days	Allows you to specify how to handle Budgeted Units for items that use Plug Days.
4	Update Primavera Cost Accounts from Estimate Account Codes	Checking this box causes assigned account codes to import into Primavera as Cost Accounts.
5	Update Price/Unit on Primavera Resource Assignments	Checking the boxes in this section will cause the Charge Rate costs of your resources to import into Primavera along with your resources.

12.1.1.4 Overview – Resources Tab

Cost Item Roll Up Login Options	Mapping Options	Resources	Expense Costs	Actuals	Tags	Activity Calendars	
Update Primavera Resources from Update all of this job's resources Update scheduled resources Do not update Primavera resources	only		 Adjust B Maintain Update Prima 	udgeted Ur Budgeted I	nits to ma Units to r Accounts f	when using Plug Days: tch Plug Duration match (non-plug) Work H from Estimate Account Co unts on Resource Assign	odes: 4
Map Resource Types to Primavera				/ Unit on Pr	imavera R	lesource Assignments: —	
Labor: Construction Equipment:	Resource	•	Construct	tion Equipr	nent		
Rented Contruction Equipment:	Resource	•	Rented C	Contruction	Equipme	nt	
Installed Material:	Resource Resource	-	🔽 Installed	Material			5
Installed Equipment:	Resource	•	✓ Installed		t		-
Supplies:	Resource	•	Supplies				

12.1.1.5 Expense Costs Tab

The Expense Costs tab is useful for bringing costs in from InEight Estimate that are not connected to resources, for example, your plugged and/or quoted cost items. This tab is optional, and it is not required to make selections here.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Fol	der Tags	Competitors	Pricing	Schedule	Cash Flow
Integrated	Schedule	:	Primavera	•	Alwa	ays use Plug Day	rs when u	pdating Es	timate from the	schedule		
Schedule C	urrency:		U.S. Dollar	•								
Cost Item	Roll Up	Login Options	Mapping Optio	ns Resources	Expense Co	osts Actuals	Tags	Activity	Calendars			
				🔽 Update Prima	vera Expense	Costs from Estin	nate					
		Co	st Category	Primavera Expe	nse Categor	у						
			Labor:	HD01 Labor			-					
		Owned	d Equipment:	HD02 Owned Equ	uipment		•					
		Rente	d Equipment:	HD03 Rented Eq	nted Equipment 👻							
			Supplies:	HD04 Supplies			•					
			Materials:	HD05 Materials								
				HD06 Subcontrac								
			Subcontract:	HD07 Fees			-					
Fees: HD08 Allowance			HD08 Allowance			•						
Allowance: HD09 Custom Ca			Category1									
		Custor	m Category 1:	HD 10 Undefined			-					
			Undefined:									

12.1.2 Schedule Cost Items

Before you can integrate with Primavera, your cost items need to be marked as Scheduled in InEight Estimate. This is done on the Cost Breakdown Structure (CBS) Register. From your Saved Views dropdown list in the CBS, the Schedule Setup View displays all of your schedule-related columns. There are a couple to keep in mind when you schedule your items:

- **Scheduled**: This column tells you which of your items are selected to be included in your Primavera schedule
- **Roll Up Schedule**: This column lets you check a box to roll up your estimate to the selected level when it imports into Primavera

The following steps walk you through scheduling your cost items.

Step by Step — Schedule a Cost Item in InEight Estimate

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. In the Saved Views drop-down list, select Schedule Setup View.

Saved views: Schedule Setup View

- In the Scheduled column, you can select the checkbox for each cost item that you want to schedule
- If a cost item has subordinate cost items below it, you will only be able to check the superior cost item, which will automatically schedule the subordinate cost items along with it
- 3. Select the **Mobilization**, **Clearing & Grubbing**, and **Unclassified Excavation** cost items, then press **Tab**.

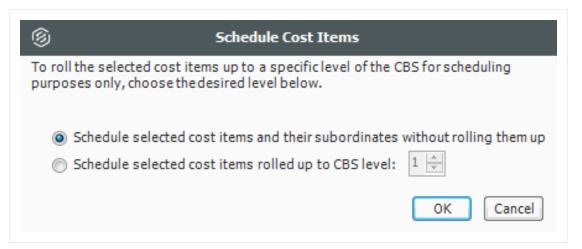
CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
	JOB	✓	
+	Prime Bond		
+	Price % Add-On		
+	Job Financing		
+	Indirect Cost Escalation		
+	Direct Cost Escalation		
+	Indirect Cost Add-On		
+	Job Management & Equipment		
+	General Expense		
+	Direct Cost Add-On		
+ 1	Mobilization	✓	
+ 2	Clearing & Grubbing	✓	
□ 3	Unclassified Excavation	\checkmark	
+ 3.1	Excavation	 Image: A set of the set of the	
+ 3.2	Embankment	✓	
□ 4	Aggregate Base		
+ 4.1	Furnish & Haul Base Material		
+ 4.2	Finegrade Subgrade		

Step by Step — Schedule a Group of Cost Items in InEight Estimate

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select **Schedule Setup View**.
 - To schedule multiple cost items, you can highlight the row for each cost item that you want to schedule, using the Shift and Ctrl keys to select multiple rows.
- 3. Select additional cost items 4-Aggregate base, 5- Asphalt Concrete Hot Mix, and 6- 36-inch RCP Culvert Class.
 - TIP To schedule all cost items, highlight the JOB row.
- 4. Right click on the selected rows and select Schedule Selection.

Со	st Breakdown Struct	ure (CBS) Register 🛛 🕲	<u>کا</u>	<u>O</u> pen	
Dra	g columns here to group		Ð	New	pr]
Dia	g columns here to group		8	Delete	5
	CBS Position Code	Description	*	Cu <u>t</u>	thedule ID
\rightarrow	+ 1	Mobilization	5	Copy	D.0000011
	+ 2	Clearing & Grubbing	E	<u>P</u> aste	D.0000012
	■ 3	Unclassified Excavation	+	<u>Fill Down</u>	D.0000013
	+ 3.1	Excavation	8	Link these fields to Excel	D.0000014
	+ 3.2	Embankment	8	UnLink from Excel	D.0000015
	■ 4	Aggregate Base	→	Indent	D.0000016
	+ 4.1	Furnish & Haul Base Material	+	Outdent	D.0000017
	+ 4.2	Finegrade Subgrade		Insert	D.0000018
	■ 4.3	Install Aggregate Base		Insert Subordinate	D.0000019
	+ 4.3.1	Place Aggregate Base	H	Insert Dependent Cost Item	D.0000020
	+ 4.3.2	Blue Top Aggregate Base	÷.	Insert Cost Item Assembly	D.0000021
	■ 5	Asphalt Concrete Hot Mix Type A	Ę.	Insert Cost Item Assembly as Subordinate	D.0000022
	+ 5.1	Furnish & Haul Hot Mix	M	Split	D.0000023
k	+ 5.2	Install Hot Mix Type A			D.0000024
	E 6	36 Inch RCP Culvert Class III	2	Insert <u>R</u> esource	D.0000025
	+ 6.1	Furnish RCP Materials	12	Ins <u>e</u> rt Resource Assembly	D.0000026
	+ 6.2	Excavate RCP Trench	0	Toggle Suspended	D.0000027
	+ 6.3	Install RCP Pipe		Go To Cost Allocation Item	D.0000028
	+ 6.4	Backfill RCP Pipe		Schedule Selection	D.0000029
	7	10 Inch PVC Force Main (SDR21)	<u>_</u>		D.0000030
				Calculate Plug Days	
	10			Subtotal Calculator	
4				Add Quote	_

- On the Schedule Cost Items dialog, you can select whether or not you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes
- 5. Select Schedule selected cost items and their subordinates without rolling them up, then click OK.



• Your scheduled cost items will import into Primavera the next time you update Primavera from InEight Estimate.

12.1.2.6 Roll Up Schedule

For cost item 3 – Unclassified Excavation, your scheduler does not need all of your estimate details and wants to roll up your cost items to a higher level when they import into the Primavera schedule.

Follow the steps below to learn how to roll up your cost items for the schedule.

Step by Step — Roll Up Schedule

- 1. In the **Training Job**, from the Estimate tab select **Cost Breakdown Structure**.
- 2. From the Saved Views drop-down list, select **Schedule Setup View**.
 - Review your cost items to decide which cost items need to be rolled up
- 3. Select the **Roll Up Schedule** checkbox on the Unclassified Excavation cost item.

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	✓	
+ 2	Clearing & Grubbing	\checkmark	
□ 3	Unclassified Excavation	\checkmark	\checkmark
+ 3.1	Excavation		
+ 3.2	Embankment		
□ 4	Aggregate Base	\checkmark	
+ 4.1	Furnish & Haul Base Material	\checkmark	
+ 4.2	Finegrade Subgrade	✓	
□ 4.3	Install Aggregate Base	✓	
+ 4.3.1	Place Aggregate Base	✓	
+ 4.3.2	Blue Top Aggregate Base	✓	

12.1.3 Update Primavera from InEight Estimate

Now that you have set up your Primavera options in Job Properties and scheduled your cost items in the CBS, you are ready to send your project information to Primavera.

When you first update Primavera from InEight Estimate, Primavera will create a new project automatically and load it with the following information from InEight Estimate:

	Data Sent from InEight Estima	ate to Primavera
Data Type	InEight Estimate	Primavera
Project Data	Job Code	Project ID
	Job Description	Project Name
Activity Data	CBS Position Code//Schedule ID	WBS Code / Activity ID
	Description	WBS Element / Activity Name
	Hours	Planned Duration (Hours)
	Shift and Rate Rules	Activity Calendar
	Cost Item Tags and UDFs	Activity Codes or UDFs
	Cost Category Total Cost	Cost Category (custom text columns)
Resource Data	Resource Code	Resource ID
	Resource Description	Resource Name
Cost Data	Resource Cost / Unit	Resource Price / Unit
	Cost Category Total Cost	Expense Category Budgeted Cost

NOTE Tags, resource data, and cost data only update in Primavera if selected in the Job Properties > Schedule settings.

The following steps walk you through updating Primavera from InEight Estimate to create a new schedule.

Step by Step — Update Primavera from InEight Estimate

1. From the Estimate tab, select **Schedule>Update Primavera from InEight Estimate**.

® 💾 -			Traini	ing Job - Estin	nate
File Setup Estimat	e Quote Price	Execution	System Int	tegrations	Actions
Cost Breakdown Structure (CBS)	Workbook	ule Cash Flow	Indirect Cost Items	Price Break	
Breakdown Struc Re	s Workbook	Update Primaver	a from Estimate	0verhea	d and Pr
Cost Breakdown Structur	e (CBS) Register 🛭 🔂	Update Estimate	from Primavera	141	
Drag columns here to group					Find: [Sea
CBS Position Code 🗎	Description		Scheduled	Roll Up Schedule	WBS Element
+ 1	Mobilization		\checkmark		
+ 2	Clearing & Grubbing		\checkmark		
3	Unclassified Excavation		✓	\checkmark	
+ 3.1	Excavation				
+ 3.2	Embankment				
□ 4	Aggregate Base		\checkmark		\checkmark
+ 4.1	Furnish & Haul Base Materia	al	\checkmark		
+ 4.2	Finegrade Subgrade		\checkmark		
4.3	Install Aggregate Base		\checkmark		\checkmark

- The Update Primavera From Estimate dialog prompts you to indicate what data to update to Primavera
- 2. Make sure **Resources** and **Expenses** are checked. Deselect **Actuals** (For Job Tracking purposes) if auto selected, then click **OK**.

Opdate Primavera From Estimate					
Choose the data to update in the linked Primavera schedule. Data will be updated according to the Schedule options specified in Job Properties.					
WBS / Activit	ies (always updated)				
Resources					
Expenses					
Cartuals					
Tags					
Schedule Rela	ationships				
Please commit any	y changes in Primavera before clicking OK.				
	OK Cancel				

- An Attention prompt appears, letting you know that the job has not been saved.
- 3. Click Yes to save the job before updating Primavera.

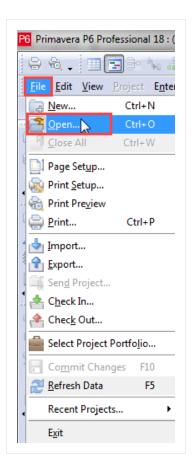
Attention	
	iges that have not been saved. Only to Primavera. Would you like to save the era?
Never ask me this quest	tion again
	Yes No

• A window appears that shows the progress of the data sync between InEight Estimate and Primavera. Depending on the size of the job, this can take several minutes

B Waiting for Primavera	Integration Server	
	••• (i
Status 🕏	Job Code	Description
Loading Job	Training Job	Updating Pri
•		4

- When the window disappears, the update is complete
- 4. Open Primavera P6 (Project Management) client.
- 5. Log in to Primavera, using the same Username and Password that was entered on the Schedule > Login Options tab in InEight Estimate Job Properties.

6. In Primavera, open the project.



7. In the Open Project dialog, expand the **BID*BUILD** folder.

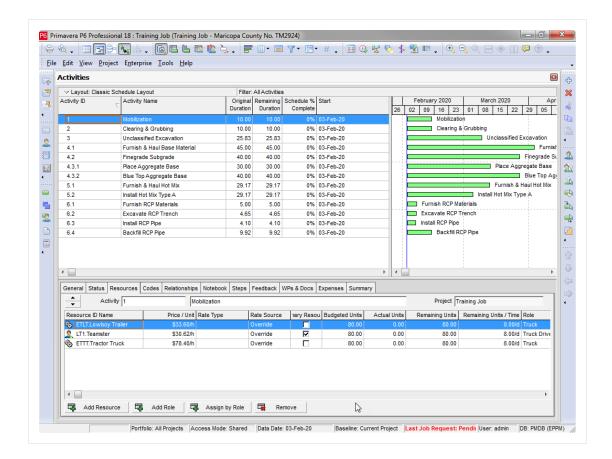
Layout: Projects			
Project ID	Is BID*BUILD Job	Project Name	Total Activities
🖬 🐟 EPS		Enterprise	0
🛨 🔈 BID*BUILD		BID*BUILD	0

NOTE All projects created from InEight Estimate are created in the BID*BUILD folder by default.

- Your available projects are sorted by their job names.
- 8. Select the **Training Job** (with your initials) so that it is highlighted, and then select **Open**.

Select Project Portfolio	All Projects			 Image: A start of the start of	<u>O</u> pen
⊲ Display				0	Cancel
Project ID	Is BID*BUILD Job	Project Name	Proje		
🔹 🐟 EPS		Enterprise	Ac		Users
💼 Training Job - B	Yes	Training Job - Maricopa Counț	Activ		
BID*BUILD		BID*BUILD	Ac	?	Help
💼 R19	Yes	<unspecified></unspecified>	Activ		
🛅 S1	Yes	Training Job - Maricopa Count	Activ		
🛅 Training Job21	Yes	Training Job - Maricopa Count	Activ		
📄 AJL Sched Test	Yes	Training Job - Maricopa Count,	Activ		
📄 Test job3	Yes	Training Job - Maricopa Counț	Activ		
📄 Training Job	Yes	Training Job - Maricopa Count	Activ		
۲ 🔲			*		
			1		
Access Mode					

- The WBS Layout displays for the project. You can see the breakdown structure imported from InEight Estimate with durations, rolled up as specified by the Roll Up Schedule option in InEight Estimate
- Initially, the start date for your activities is the start date defined on the Job Properties > Cover Sheet tab (these will change as activity relationships are defined)
- 9. Select the **Resources** tab to see the resources that imported for each activity, with their associated costs.



12.1.4 Update InEight Estimate from Primavera

You can also bring information back from Primavera into InEight Estimate. When you update InEight Estimate from Primavera, the following information updates:

Upda	te InEight Estimate	e from Primavera
Data Type	Primavera	InEight Estimate
Activity Data	Start Dates	Start Dates
	Finish Dates	Finish Dates
	Relationships	Schedule Relationships
	Hours	Plugged Days

Complete the following steps to practice updating InEight Estimate from Primavera. You will create a scheduling relationship in Primavera, and then import the updated dates and relationships into InEight Estimate.

Step by Step — Update InEight Estimate from Primavera

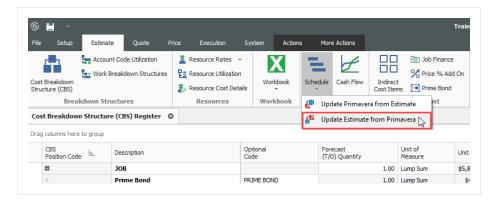
- 1. Open your version of the **Training Job** project in Primavera.
 - In the real world, it is likely that you would have overlapping activities, or your activities would occur out of order, however for this example you will link all activities from finish to start
- 2. Highlight all of your activities from 1-Mobilization through 6.4-Backfill RCP Pipe.

<u>E</u> dit <u>V</u> iew <u>P</u>	roject E <u>n</u> terprise <u>T</u> ools <u>H</u> elp										
Activities											6
✓ Layout: Clas	sic Schedule Layout	Filter:	AllActivities	5							
Activity ID	C Activity Name	Original Duration	Remaining Duration	Schedule % Complete		26	1,	ary 2020 16 23	March 2		Ap 29 05
1	Mobilization	10.00	10.00	0%	03-Feb-20			Mobilizatio	ņ		
2	Clearing & Grubbing	10.00	10.00	0%	03-Feb-20			Clearing &	Grubbing		
3	Unclassified Excavation	25.83	25.83		03-Feb-20				Uncla	ssified Exc	avation
4.1	Furnish & Haul Base Material	45.00	45.00		03-Feb-20						Furnis
4.2	Finegrade Subgrade	40.00	40.00		03-Feb-20					F	negrade S
4.3.1	Place Aggregate Base	30.00	30.00		03-Feb-20		-		Pla	ice Aggreg	ate Base
4.3.2	Blue Top Aggregate Base	40.00	40.00		03-Feb-20					B	lue Top A
5.1	Furnish & Haul Hot Mix	29.17	29.17		03-Feb-20				Fu	rnish & Hau	ul Hot Mix
5.2	Install Hot Mix Type A	29.17	29.17	0%	03-Feb-20				Install Ho	t Mix Type	A
6.1	Furnish RCP Materials	5.00	5.00	0%	03-Feb-20		📃 Fur	nish RCP Ma	terials		
6.2	Excavate RCP Trench	4.65	4.65		03-Feb-20		Exc	avate RCP T	rench		
6.3	Install RCP Pipe	4.10	4.10	0%	03-Feb-20		Inst	all RCP Pipe			
6.4	Backfill RCP Pipe	9.92	9.92	0%	03-Feb-20			Backfill RC	P Pipe		

- 3. Right click on one of the selected rows and select **Link Selected Activities** to create the Finish to Start relationship.
 - You may have to select the Relationship Lines button to show the linked activities in the graph on the right side of the screen.
- 4. To schedule this new relationship, select the **Schedule** button (or press the **F9** key).
- 5. On the Schedule Project window, keep the default settings and select the Schedule button.

Project(s) to schedule	1	0	Cancel
Current Data Date	03-Feb-20		Schedule
	,		View Log
Project Forecast Start Date		?	Help
🔲 Set Data Date and Planned Start to Pr	oject Forecast Start during scheduling	▶	Options
Log to file			
C:\Users\anthony.lamantia\Document	s\SchedLog.txt		

- 6. To update InEight Estimate with this change, go back to InEight Estimate and select Estimate tab.
- 7. Select Schedule>Update Estimate from Primavera.



8. On the Update InEight Estimate from Primavera prompt, keep the default **Update the estimate to stay in synch with the schedule** selected, then click **OK**.

Opdate Estimate from Primavera
This will update the cost items in this job with schedule dates, durations and descriptions from Primavera. This may change the duration of these cost items, which could affect their cost. Changes made to Resource or Cost data in Primavera will NOT affect Estimate. How do you wish to proceed?
Update the estimate to stay in synch with the schedule. Change the estimated work hours for all hourly resources employed on these cost items to reflect the new durations (this will change the cost item's cost).
Do NOT update the estimate. Instead, schedule these cost items using Plug Days. (Note: you can toggle the schedule between Plug Days and Estimated Days for each cost item directly in the Job's CBS.)
OK Cancel
Never ask me this question again

9. On the Schedule Setup View, you can see the Start and Finish dates updated from Primavera.

CBS Position Code 🗎	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
	ЈОВ	2/3/2020	2/23/2021	2/3/2020	2/23/2021	2/3/2020	2/23/202
+	Prime Bond						
+	Price % Add-On						
+	Job Financing						
+	Indirect Cost Escalation						
+	Direct Cost Escalation						
+	Indirect Cost Add-On						
+	Job Management & Equipment						
+	General Expense						
+	Direct Cost Add-On						
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/14/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/202
□ 3	Unclassified Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.1	Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.2	Embankment	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
□ 4	Aggregate Base	4/6/2020	11/9/2020	4/6/2020	11/9/2020	4/6/2020	11/9/202
+ 4.1	Furnish & Haul Base Material	4/6/2020	6/8/2020	4/6/2020	6/8/2020	4/6/2020	6/8/2020
+ 4.2	Finegrade Subgrade	6/8/2020	8/3/2020	6/8/2020	8/3/2020	6/8/2020	8/3/2020
□ 4.3	Install Aggregate Base	8/3/2020	11/9/2020	8/3/2020	11/9/2020	8/3/2020	11/9/2020
+ 4.3.1	Place Aggregate Base	8/3/2020	9/14/2020	8/3/2020	9/14/2020	8/3/2020	9/14/202

12.1.5 Manage Changes Between Estimate and Schedule

As changes to scope, resources, and costs come up in your estimate, and changes to relationships and dates occur in the schedule, you can continue updating your estimate and schedule as needed.

12.1.5.7 Plug Days

The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab.

For example, your 10" PVC Pipe activity may have extra days in the schedule due to the delivery date of the pipe material, but you don't want those extra days to drive the costs in your estimate, since your crews won't be working on the activity on those extra days.

NOTE All superior cost items are hard-coded to use Schedule Plug Days.

Step by Step — Schedule Plug Days

- 1. Look at the Days (Duration driven) column in the CBS where it shows 4.65 days for Excavate-Install-Backfill Pipe.
- 2. Make sure the **Schedule Plug Days** checkbox is selected on the **Excavate-Install-Backfill Pipe** cost item, then enter a Plug Days duration for the number of days the item will be scheduled in Primavera (**7** days).

CBS Position Code 🗎	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	\checkmark	26.01
+ 6.1	Furnish RCP Materials	0.00	\checkmark	5.00
+ 6.2	Excavate RCP Trench	4.65	\checkmark	7.00
+ 6.3	Install RCP Pipe	4.10		4.00
+ 6.4	Backfill RCP Pipe	9.92		9.92

• This allows you to maintain your duration of 4.65 days in the estimate and 7 days in the schedule.

12.1.5.8 Update Primavera with InEight Estimate Changes

The following steps will walk you through updating the schedule with a scope change in your estimate.

Step by Step — Update Primavera with InEight Estimate Changes

- 1. In the Training Job from the Estimate tab, select Cost Breakdown Structure.
 - In this scenario, there is a scope change for your Excavation requiring you to change all of your quantities
- 2. Change the quantity in the Forecast (T/O) Quantity field in the CBS as specified below:

Quantity Change for Cost Item							
CBS Code	Description	Old Quantity	New Quantity				
5	Asphalt Concrete Hot Mix Type A	35,000	25,000				

- As you make your changes, take note of how your duration changes in the Days (Duration driven) column for these items
- If prompted about changing Total or Unit Cost, select **Change TOTAL cost**, so that your unit costs stay intact, then click **OK**.

3 Attention
You have changed the quantity for a cost item that already contains costs. Would you like the TOTAL cost to change or the UNIT cost?
Ohange TOTAL cost
Change UNIT cost
Deactivate this confirmation for quantity changes FOR ALL JOBS and ALWAYS change the TOTAL cost
To re-activate this confirmation, choose Tools > Activate Unit/Total Confirmation for Quantity Changes.
ОК

3. From the Estimate tab, select **Schedule>Update Primaverafrom InEight Estimate** to send the changed hours to Primavera.

- The Update Primavera From InEight Estimate dialog prompts you to indicate what data to update to Primavera
- 4. Make sure Resources and Expenses are checked, then select **OK**.

9	Update Primavera From Estimate								
Choose the data to update in the linked Primavera schedule. Data will be updated according to the Schedule options specified in Job Properties.									
WBS / Activit	ies (always updated)								
Resources									
Expenses									
Cartuals									
Tags									
Schedule Rela	ationships								
Please commit any	y changes in Primavera before clicking OK.								
	OK Cancel								

• A window appears that shows the progress of the data sync between InEight Estimate and Primavera. Depending on the size of the job, this can take a few minutes

Waiting for Primavera Integration Server						
	•••	S				
Status 😼	Job Code	Description				
Loading Job	Training Job	Updating Pr				
<		4				

- When the window disappears, the update is complete
- 5. Open Primavera (P6 Web Client).
- 6. Open the **Training Job** project.
- 7. On the Activities screen, compare the Planned Duration to the Days (Duration driven) in InEight Estimate for Excavate-Install-Backfill Pipe.
 - The Primavera scheduled duration should have changed from 4.65 days to 7 days to match the updated duration in InEight Estimate for Excavate-Install-Backfill Pipe
 - You will also notice a change in days for Excavation after changing the T/O Quantity in InEight Estimate

ule Layout ctivity Name obilization learing & Grubbing ccavation		All Activitie Remaining Duration 10.00	Schedule % Complete	Start	pruar 09	y 202			arch	2020)		Ap	·il 2020		
ctivity Name obilization learing & Grubbing	Original Duration 10.00	Remaining Duration	Schedule % Complete	Start		<u> </u>			arch	2020)	1	Ap	·il 2020		
obilization learing & Grubbing	Duration 10.00	Duration	Complete	Start		<u> </u>			arch	2020)		Ap	ril 2020		
learing & Grubbing	10.00				09					March 2020				April 2020		
learing & Grubbing		10.00				16	23	01 08	3	15	22	29	05	12 1		
	10 00		0%	03-Feb-20		Mobi	ization									
kcavation		10.00	0%	17-Feb-20	4	-	_	Clearing	& 0	Grubb	ing					
	15.63	15.63	0%	02-Mar-20			÷			_	Ex	avati	on			
mbankment	20.83	20.83	0%	23-Mar-20						L.	-	-				
urnish & Haul Base Material	45.00	45.00	0%	21-Apr-20										ا جا		
negrade Subgrade	40.00	40.00	0%	23-Jun-20			1					1				
ace Aggregate Base	30.00	30.00	0%	18-Aug-20												
lue Top Aggregate Base	40.00	40.00	0%	29-Sep-20												
urnish & Haul Hot Mix	20.83	20.83	0%	24-Nov-20												
stall Hot Mix Type A	20.83	20.83	0%	23-Dec-20												
urnish RCP Materials	5.00	5.00	0%	15-Jan-21			1					1				
stall RCP Pipe	4.10	4.10	0%	02-Feb-21												
ackfill RCP Pipe	9.92	9.92	0%	08-Feb-21												
	negrade Subgrade ace Aggregate Base ue Top Aggregate Base minish & Haul Hot Mix stall Hot Mix Type A stall Hot Mix Type A urnish RCP Materials covarde RCP Trench stall RCP Pipe	negrade Subgrade 40.00 ace Aggregate Base 30.00 ue Top Aggregate Base 40.00 minis A Haul Hot Mix 20.83 stall Hot Mix Type A 20.83 stall Hot Mix Type A 20.83 covarde R2P Trench 7.00 stall RCP Pipe 4.10	negrade Subgrade 40.00 40.00 ace Aggregate Base 30.00 30.00 ue Top Aggregate Base 40.00 40.00 minish & Haul Hot Mix 20.83 20.83 stall Hot Mix Type A 20.83 20.83 stall Hot Mix Type A 5.00 5.00 cosynate RCP Interints 7.00 7.00 stall RCP Pipe 4.10 4.10	negrade Subgrade 40.00 40.00 0% ace Aggregate Base 30.00 30.00 0% ue Top Aggregate Base 40.00 40.00 0% minis A Haul Hot Mix 20.83 20.83 0% stall Hot Mix Type A 20.83 20.83 0% urnish R-CP Materials 5.00 5.00 0% stall RCP Pipe 4.10 0% 0%	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Aggregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29-Sep-20 minis A Haul Hot Mix 20.83 20.83 0% 29-Sep-20 stall Hot Mix 20.83 20.83 0% 23-Dec-20 stall Hot Mix Type A 20.83 20.83 0% 23-Dec-20 stall Rot Mix Type A 5.00 5.00 0% 15-Jan-21 covards RGP Internation 7.00 7.00 0% 22-Jan-24 stall RCP Pipe 4.10 0% 02-Feb-21	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace A ggregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29-Sep-20 minis A Haul Hot Mix 20.83 20.83 0% 24-Nov-20 stall Hot Mix 20.83 20.83 0% 23-Dec-20 urnish RCP Materials 5.00 5.00 0% 15-Jan-21 coyate RCP Trench 7.00 7.00 0% 92-Feb-21 stall RCP Pipe 4.10 4.10 0% 02-Feb-21	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace A ggregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 18-Aug-20 mish & Haul Hot Mix 20.83 20.83 0% 24-Nov-20 stall Hot Mix 20.83 20.83 0% 23-Dec-20 urnish RCP Materials 5.00 5.00 0% 15-Jan-21 cosynte RCP Trench 7.00 700 0% 22-Jan-24	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Aggregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29-Sep-20 mish & Haul Hot Mix 20.83 20.83 0% 24-Miov-20 stall Hot Mix 20.83 20.83 0% 23-Dec-20 urnish RCP Materials 5.00 5.00 0% 15-Jan-21 ceavate RCP Trench 7.00 7.00 0% 22-Jan-24	negrade Subgrade 40.00 40.00 0% 23.Jun-20 ace Aggregate Base 30.00 30.00 0% 18.Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29.Sep-20 minish & Haul Hot Mix 20.83 20.83 0% 23.Dec-20 stall Hot Mix Type A 20.83 20.83 0% 23.Dec-20 urnish RCP Materials 5.00 5.00 0% [5.Jan-21 covarde BQP Trench 7.00 7.00 0% [22.Jan-21 stall RCP Pipe 4.10 0% 02.Feb-21 [20.83	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Apgregate Base 30.00 30.00 0% 12-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 12-Aug-20 mish & Haul Hot Mix 20.83 20.83 0% 12-Aug-20 stall Hot Mix 20.83 20.83 0% 12-Aug-20 stall Hot Mix 20.83 20.83 0% 12-Dec-20 strink RCP Materials 5.00 5.00 0% 15-Jan-21 cevarde RGP Trench 7.00 7.00 0% 12-Jan-21 stall RCP Pipe 4.10 0% 02-Feb-21	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Aggregate Base 30.00 30.00 0% 12-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 12-Aug-20 mish & Haul Hot Mix 20.83 20.83 0% 12-Aug-20 stall Hot Mix 20.83 20.83 0% 12-Aug-20 stall Hot Mix 20.83 20.83 0% 12-Aug-20 stall Hot Mix Type A 20.83 20.83 0% 12-Dec-20 strink RCP Materials 5.00 5.00 0% 15-Jan-21 cevarde RGP Trench 7.00 7.00 0% 12-Jan-21 stall RCP Pipe 4.10 0% 12-Feb-21 12-Feb-21	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Apgregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29-Sep-20 mish & Haul Hot Mix 20.83 20.83 0% 23-Dec-20 stall Hot Mix Type A 20.83 20.83 0% 23-Dec-20 urnish RCP Materials 5.00 5.00 0% 15-Jan-21 covarde BQP Trench 7.00 7.00 0% 02-Sep-21	negrade Subgrade 40.00 40.00 0% 23-Jun-20 ace Apgregate Base 30.00 30.00 0% 18-Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29-Sep-20 mish & Haul Hot Mix 20.83 20.83 0% 23-Dec-20 stall Hot Mix Type A 20.83 20.83 0% 23-Dec-20 urnish RCP Materials 5.00 5.00 0% 15-Jan-21 covarde BQP Trench 7.00 700 0% 12-Jan21 stall RCP Pipe 4.10 0% 02-Feb-21	negrade Subgrade 40.00 40.00 0% 23.Jun-20 ace Aggregate Base 30.00 30.00 0% 18.Aug-20 ue Top Aggregate Base 40.00 40.00 0% 29.Sep-20 minish & Haul Hot Mix 20.83 20.83 0% 23.Dec-20 stall Hot Mix Type A 20.83 20.83 0% 23.Dec-20 urnish RCP Materials 5.00 5.00 0% 15.Jan-21 covarde BQP Trench 7.00 7.00 0% 92.Feb-21		

- 8. To schedule this change in Primavera, select the **Schedule** button (or press the **F9** key) and select the **Schedule** button on the Schedule Project window.
- Your start and finish dates are different now. In InEight Estimate, from the Estimate tab, select Schedule>Update InEight Estimate from Primavera to update InEight Estimate with the new dates.

CBS Position Code 🗎	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/17/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	3/2/2020
□ 3	Unclassified Excavation	3/2/2020	4/21/2020	3/2/2020	4/21/2020	3/2/2020	4/21/2020
+ 3.1	Excavation	3/2/2020	3/23/2020	3/2/2020	3/23/2020	3/2/2020	3/23/2020
+ 3.2	Embankment	3/23/2020	4/21/2020	3/23/2020	4/21/2020	3/23/2020	4/21/2020
□ 4	Aggregate Base	4/21/2020	11/24/2020	4/21/2020	11/24/2020	4/21/2020	11/24/2020
+ 4.1	Furnish & Haul Base Material	4/21/2020	6/23/2020	4/21/2020	6/23/2020	4/21/2020	6/23/2020
+ 4.2	Finegrade Subgrade	6/23/2020	8/18/2020	6/23/2020	8/18/2020	6/23/2020	8/18/2020
■ 4.3	Install Aggregate Base	8/18/2020	11/24/2020	8/18/2020	11/24/2020	8/18/2020	11/24/2020
+ 4.3.1	Place Aggregate Base	8/18/2020	9/29/2020	8/18/2020	9/29/2020	8/18/2020	9/29/2020
+ 4.3.2	Blue Top Aggregate Base	9/29/2020	11/24/2020	9/29/2020	11/24/2020	9/29/2020	11/24/2020
□ 5	Asphalt Concrete Hot Mix Type A	11/24/2020	1/14/2021	11/24/2020	1/14/2021	11/24/2020	1/15/2021
+ 5.1	Furnish & Haul Hot Mix	11/24/2020	12/23/2020	11/24/2020	12/23/2020	11/24/2020	12/23/2020
+ 5.2	Install Hot Mix Type A	12/23/2020	1/14/2021	12/23/2020	1/14/2021	12/23/2020	1/15/2021
6	36 Inch RCP Culvert Class III	1/15/2021	2/22/2021	1/15/2021	2/22/2021	1/15/2021	2/22/2021
+ 6.1	Furnish RCP Materials	1/15/2021	1/21/2021	1/15/2021	1/21/2021	1/15/2021	1/21/2021
+ 6.2	Excavate RCP Trench	1/22/2021	2/1/2021	1/22/2021	2/1/2021	1/22/2021	2/1/2021
+ 6.3	Install RCP Pipe	2/2/2021	2/8/2021	2/2/2021	2/8/2021	2/2/2021	2/8/2021
+ 6.4	Backfill RCP Pipe	2/8/2021	2/22/2021	2/8/2021	2/22/2021	2/8/2021	2/22/2021

Exercise 12.1 — Manage Changes Between Estimate and Primavera

As changes occur during the estimating process, you can keep the estimate and schedule in sync through schedule integration. In this exercise, you will practice making changes between the estimate and schedule. Complete the following steps:

- 1. Open the **Training Job** and open the **CBS Register**.
- 2. Check the box in the Schedule Plug Days column for the Install RCP Pipe.
- 3. Change the Plug Days for Install RCP Pipe to 8 days.
- 4. Update Primavera from InEight Estimate.
- 5. Open the Training Job project in Primavera and confirm the Planned Duration (you may need to change your view to see this column) changed to 8 days.
- 6. In Primavera, change the Planned Duration for Backfill RCP Pipe to **12 days**.
- 7. Schedule the changes in Primavera (Schedule button or F9).
- 8. Update InEight Estimate from Primavera.

You should end up with the following results

Cost item 6.3 Install RCP Pipe is now showing 8 Plug days in Primavera.

ctivity ID	√ Activity Name	Original Duration	Remaining Duration	Schedule % Complete		Finish
1	Mobilization	10.00	10.00	0%	03-Feb-20	14-Feb-20
2	Clearing & Grubbing	10.00	10.00	0%	17-Feb-20	28-Feb-20
3.1	Excavation	15.63	15.63	0%	02-Mar-20	23-Mar-20
3.2	Embankment	20.83	20.83	0%	23-Mar-20	21-Apr-20
4.1	Furnish & Haul Base Material	45.00	45.00	0%	21-Apr-20	23-Jun-20
4.2	Finegrade Subgrade	40.00	40.00	0%	23-Jun-20	18-Aug-20
4.3.1	Place Aggregate Base	30.00	30.00	0%	18-Aug-20	29-Sep-20
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	29-Sep-20	24-Nov-20
5.1	Furnish & Haul Hot Mix	20.83	20.83	0%	24-Nov-20	23-Dec-20
5.2	Install Hot Mix Type A	20.83	20.83	0%	23-Dec-20	14-Jan-21
6.1	Furnish RCP Materials	5.00	5.00	0%	15-Jan-21	21-Jan-21
6.2	Excavate RCP Trench	7.00	7.00	0%	22-Jan-21	01-Feb-21
6.3	Install RCP Pipe	8.00	8.00	0%	02-Feb-21	11-Feb-21
6.4	Backfill RCP Pipe	9.92	9.92	0%	08-Feb-21	22-Feb-21

Cost item 6.4 Backfill RCP Pipe should have 12 plug days in InEight Estimate.

CBS Position Code 🗎	Description	Days (Duration driven)	Schedule Plug Days	Plug Days	Start	Finish
6	36 Inch RCP Culvert Class III	18.66	\checkmark	46.00	1/15/2021	3/1/2021
+ 6.1	Furnish RCP Materials	0.00	\checkmark	5.00	1/15/2021	1/21/2021
+ 6.2	Excavate RCP Trench	4.65	✓	7.00	1/22/2021	2/1/2021
+ 6.3	Install RCP Pipe	4.10	\checkmark	8.00	2/2/2021	2/11/2021
+ 6.4	Backfill RCP Pipe	9.92	✓	12.00	2/12/2021	3/1/2021

Congratulations, you have completed this exercise!

12.2 MICROSOFT PROJECT

12.2.1 Set Up Scheduling Options

Prior to sending information from InEight Estimate to Microsoft Project, you need to make sure the proper settings are in place.

12.2.1.1 Job Properties Schedule Tab

Microsoft Project scheduling options are configured on the Schedule tab of the Job Properties form.

- At the top of the Schedule tab, the Integrated Schedule must be set to Microsoft Project
- As a default, the Always use Plug Days when updating InEight Estimate from the schedule checkbox is not selected (on a job by job basis, this box can be checked later for jobs in which an estimator does not want updates from Microsoft Project to change the duration and therefore the cost of your cost items in InEight Estimate)

	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipme
ntegrated	Schedule:	[Microsoft Proje	ct 🔹	🔲 Alwa	ays use Plug Day	s when updating Es	timate from the	schedule		-	
chedule C	Currency:		U.S. Dollar	•						•		
Cost Item	Roll Up											
			-	p cost items for se	theduling purp	poses						
() L	ongest sche	duled days amo	ing all rolled up	costitems								
T	otal schedul	ed days for all i	olled up cost it	ems								
Note	. When rolli	na un cost item	sforscheduling	nurnoses, the Pl	in Days of the	e superior cost it	em					
				g purposes, the Pl ne scheduled days			em					
will b	oe recalculat	ed when a chan	ge is made to th	ne scheduled days	of a subordi	nate.						
will b	oe recalculat orce immedia	ed when a chang te recalculation	ge is made to the of Plug Days fo		of a subordi ems, use the	nate. Recalculate Plug						
will b To fo butto	oe recalculat orce immedia	ed when a chang ite recalculation Iculate Plug Day	ge is made to the of Plug Days fo	ne scheduled days or superior cost it	of a subordi ems, use the	nate. Recalculate Plug						

12.2.2 Schedule Cost Items

Before you can integrate with Microsoft Project, your cost items need to be marked as Scheduled in InEight Estimate. This is done on the Cost Breakdown Structure (CBS) Register. From your Saved Views drop-down list in the CBS, the Schedule Setup View displays all of your schedule-related columns. There are a couple to keep in mind when you schedule your items:

- Scheduled: This column tells you which of your items are selected to be included in your Primavera schedule
- **Roll Up Schedule**: This column lets you check a box to roll up your estimate to the selected level when it imports into Primavera

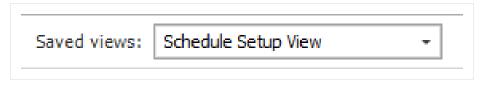
In the below example, notice that all of the cost items are scheduled, but the subordinates for Unclassified Excavation will be rolled up to the superior level.

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	✓	
+ 2	Clearing & Grubbing	✓	
□ 3	Unclassified Excavation	✓	\checkmark
+ 3.1	Excavation		
+ 3.2	Embankment		
□ 4	Aggregate Base	✓	
+ 4.1	Furnish & Haul Base Material	✓	
+ 4.2	Finegrade Subgrade	✓	
4.3	Install Aggregate Base	✓	

The following steps walk you through scheduling your cost items.

Step by Step — Schedule a Cost Item in InEight Estimate

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. In the Saved Views drop-down list, select Schedule Setup View.



- In the Scheduled column, you can select the checkbox for each cost item that you want to schedule
- If a cost item has subordinate cost items below it, you will only be able to check the superior cost item, which will automatically schedule the subordinate cost items along with it

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
2	ЈОВ	✓	
+	Prime Bond		
F	Price % Add-On		
÷	Job Financing		
+	Indirect Cost Escalation		
+	Direct Cost Escalation		
+	Indirect Cost Add-On		
+	Job Management & Equipment		
+	General Expense		
+	Direct Cost Add-On		
+ 1	Mobilization	\checkmark	
+ 2	Clearing & Grubbing	\checkmark	
3	Unclassified Excavation	✓	
+ 3.1	Excavation	✓	
+ 3.2	Embankment	\checkmark	
■ 4	Aggregate Base		
+ 4.1	Furnish & Haul Base Material		
+ 4.2	Finegrade Subgrade		

3. Select the **Mobilization**, **Clearing & Grubbing**, and **Unclassified Excavation** cost items, then press **Tab**.

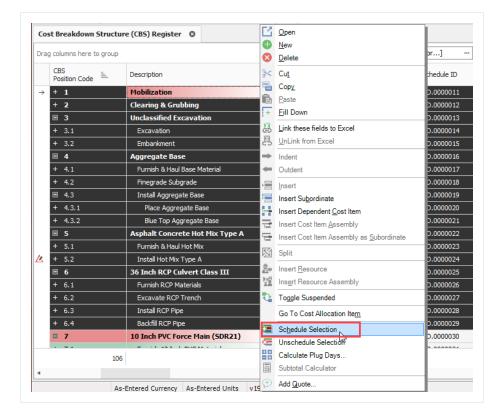
Step by Step — Schedule a Group of Cost Items in InEight Estimate

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select **Schedule Setup View**.
 - To schedule multiple cost items, you can highlight the row for each cost item that you want to schedule, using the Shift and Ctrl keys to select multiple rows.
- 3. Select additional cost items 4-Aggregate base, 5- Asphalt Concrete Hot Mix, and 6- 36-inch RCP Culvert Class.

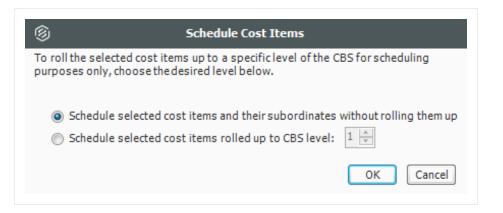
TIP

To schedule all cost items, highlight the JOB row

4. Right click on the selected rows and select Schedule Selection.



- On the Schedule Cost Items dialog, you can select whether or not you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes
- 5. Select Schedule selected cost items and their subordinates without rolling them up, then click OK.



• Your scheduled cost items will import into Primavera the next time you update Primavera from InEight Estimate.

12.2.2.2 Roll Up Schedule

For cost item 3 – Unclassified Excavation, your scheduler does not need all of your estimate details and wants to roll up your cost items to a higher level when they import into the Primavera schedule.

Follow the steps below to learn how to roll up your cost items for the schedule.

Step by Step — Roll Up Schedule

- 1. In the **Training Job**, from the Estimate tab select **Cost Breakdown Structure**.
- 2. From the Saved Views drop-down list, select Schedule Setup View.
 - Review your cost items to decide which cost items need to be rolled up
- 3. Select the Roll Up Schedule checkbox on the Unclassified Excavation cost item.

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	\checkmark	
+ 2	Clearing & Grubbing	\checkmark	
3	Unclassified Excavation	\checkmark	✓
+ 3.1	Excavation		
+ 3.2	Embankment		
□ 4	Aggregate Base	\checkmark	
+ 4.1	Furnish & Haul Base Material	✓	
+ 4.2	Finegrade Subgrade	✓	
■ 4.3	Install Aggregate Base	✓	
+ 4.3.1	Place Aggregate Base	✓	
+ 4.3.2	Blue Top Aggregate Base	✓	

12.2.3 Update Microsoft Project from InEight Estimate

Now that you have set up your schedule to integrate with Microsoft Project in Job Properties and scheduled your cost items in the CBS, you are ready to send your project information to Microsoft Project.

When you first update Microsoft Project from InEight Estimate, Microsoft Project will create a new project automatically and load it with the following information from InEight Estimate:

D	ata Sent from InEight Estim	ate to Microsoft Project
Data Type	InEight Estimate	Microsoft Project
Project Data	Job Code	Project Name
Activity Data	CBS Position Code	01 - CBS Position Code
	Description	Description
	Days (Duration Driven)	Duration
Cost Data	Cost Category Total Cost	Cost Category (custom text columns)

The following steps walk you through updating Microsoft Project from InEight Estimate to create a new schedule.

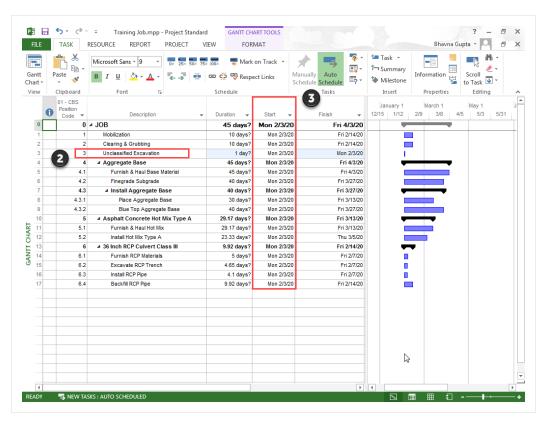
Step by Step — Update MS Project from InEight Estimate

1. From the Estimate tab, select **Schedule>Update Project from InEight Estimate**.

File		nate Quote Pi	rice Executio	n System Int	tegrations	Actions	More Actio	ns			
		ount Code Utilization rk Breakdown Structures	Resources	Resource Utilization Resource Cost Details Resource Employments	Workbook	Schedule	Cash Flow	Cost Item:	Dob Fina Price %	Add On Price Bre Structure	
		ure (CBS) Register		sources	WOIKDOOK	- · ·	n MS Proj				overneau anu
.09	St Breakdown Struct	ure (CBS) Register				🥵 Upd	ate Estima	ate from Proje	ct		
)rag	g columns here to group)				🧬 Upd	ate Projec	t from Estima	te		
CBS Position Code 🖮 Description		Optional Code			Export Copy of MS Project File			Total Cost (Forecast)	Subject Cost		
÷	•	JOB					20.00	Mile	\$294,138.13	\$5,882,762.51	
	+	Prime Bond		PRIME BOND	PRIME BOND		1.00 Lu		\$47,148.68	\$47,148.68	
	+	Price % Add-On		PRICE % ADD-ON	4		1.00	ump Sum	\$295,638.13	\$295,638.13	
	+	Job Financing		FINANCE EXPENSE		1.00	1.00	Lump Sum	\$33,105.26	\$33,105.26	
	+	Indirect Cost Escala	tion	INDIRECT COST E	SCALATION		1.00	Lump Sum	\$2,131.11	\$2,131.11	
	+	Direct Cost Escalation	on	DIRECT COST ESC	CALATION		1.00	ump Sum	\$15,048.80	\$15,048.80	
	+	Indirect Cost Add-0	n				1.00	ump Sum	\$5,888.67	\$5,888.67	\$294,433.
	+	Direct Cost Add-On		DIRECT COST AD	D-ON		1.00	ump Sum	\$104,088.34	\$104,088.34	\$5,204,417
	□ 1	SITEWORK & ROADV	YAY	200			1.00	Each	\$2,464,161.56	\$2,464,161.56	
	+ 1.1	Mobilization		641 0 100			1.00	ump Sum	\$11,909.51	\$11,909.51	

- Your job automatically opens in Microsoft Project
- The Work Breakdown Structure Layout displays for the project

- You can see the breakdown structure imported from InEight Estimate with durations, rolled up as specified by the Roll Up Schedule option in InEight Estimate
- Initially, the start date for your activities is the start date defined on the Job Properties > Cover Sheet tab (these will change as activity relationships are defined)



12.2.4 Update InEight Estimate from Microsoft Project

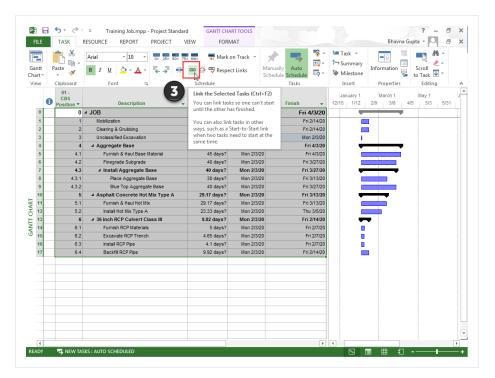
You can also bring information back from Microsoft Project into InEight Estimate. When you update InEight Estimate from Microsoft Project, the following information updates:

Update InEig	ht Estimate from M	icrosoft Project
Data Type	Microsoft Project	InEight Estimate
Activity Data	Start Dates	Start Dates
	Finish Dates	Finish Dates
	Hours	Hours

Walk through the following steps to practice updating InEight Estimate from Microsoft Project. You will create a scheduling relationship in Microsoft Project and then import the updated dates and relationships into InEight Estimate.

Step by Step — Update InEight Estimate from MS Project

- 1. Open your version of the **Training Job** project in Microsoft Project.
 - In the real world, it is likely that you would have overlapping activities or your activities would be out of order, however for this example you will link all activities from finish to start
- 2. Click on the Link Tasks icon to link all activities.



- Ensure the Auto Schedule button is selected
- 3. To update InEight Estimate with this change, go back to InEight Estimate and from the Estimate tab, select **Schedule>Update InEight Estimate from Project**.

File	Setup Estir	mate Quote Pr	ice Exe	tution	System Int	egrations /	Actions	More Actio	ins					
		count Code Utilization rk Breakdown Structures	Resources	🐉 Reso	urce Utilization urce Cost Details urce Employments	Workbook	Schedule	Cash Flow	v Indirect Cost Item		% Add On	Price Bre Structur		Di Telescont Contentent Contentent Content Content Content Content Content Content Con
	Breakdown	Structures		Resour	ces	Workbook	📑 Оре	n MS Proj	ect	Cost	t	(Overhead	d and l
Co	t Breakdown Struct	ture (CBS) Register 🛛					🚰 Upd	late Estima	ate from Proj	ect				
Dra	g columns here to group	þ					🧬 Upd	late Projec	t from Estim	ate				
	CBS Position Code 🖮	Description			Optional Code		Exp (170) Quan		of MS Project	File	Total Co (Foreca		Subject	Cost
÷		ЗОВ						20.00	Mile	\$294,138.1	13 \$5,88	2,762.51		
	+	Prime Bond			PRIME BOND			1.00	Lump Sum	\$47,148.6	58 \$4	7,148.68		
	+	Price % Add-On			PRICE % ADD-ON			1.00 1	Lump Sum	\$295,638.1	13 \$29	5,638.13		
	+	Job Financing			FINANCE EXPENSE		1.00 Lump		Lump Sum	\$33,105.2	26 \$3	3,105.26		
	+	Indirect Cost Escalat	tion		INDIRECT COST E	SCALATION		1.00 l	Lump Sum	\$2,131.3	11 \$	2,131.11		
	+	Direct Cost Escalatio	n		DIRECT COST ESC	CALATION		1.00 l	Lump Sum	\$15,048.8	30 \$1	5,048.80		
	+	Indirect Cost Add-Or	ı					1.00 l	Lump Sum	\$5,888.6	57 \$	5,888.67	\$29	94,433.
	+	Direct Cost Add-On			DIRECT COST ADD	D-ON		1.00 l	Lump Sum	\$104,088.3	34 \$10	4,088.34	\$5,20	04,417.
	□ 1	SITEWORK & ROADW	IAY		200			1.00	Each	\$2,464,161.5	\$2,46	4,161.56		
	+ 1.1	Mobilization			641 0 100			1.00 1	Lump Sum	\$11,909.5	51 \$1	1,909.51		

• On the Schedule Setup View, you can see the Start and Finish dates updated from MS Project.

CBS Position Code 🗎	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/14/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/2020
∃ 3	Unclassified Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.1	Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.2	Embankment	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
□ 4	Aggregate Base	3/3/2020	10/5/2020	3/3/2020	10/5/2020	3/3/2020	10/5/2020
+ 4.1	Furnish & Haul Base Material	3/3/2020	5/4/2020	3/3/2020	5/4/2020	3/3/2020	5/4/2020
+ 4.2	Finegrade Subgrade	5/5/2020	6/29/2020	5/5/2020	6/29/2020	5/5/2020	6/29/2020
4 .3	Install Aggregate Base	6/30/2020	10/5/2020	6/30/2020	10/5/2020	6/30/2020	10/5/2020
+ 4.3.1	Place Aggregate Base	6/30/2020	8/10/2020	6/30/2020	8/10/2020	6/30/2020	8/10/2020
+ 4.3.2	Blue Top Aggregate Base	8/11/2020	10/5/2020	8/11/2020	10/5/2020	8/11/2020	10/5/2020
5	Asphalt Concrete Hot Mix Type A	10/6/2020	12/17/2020	10/6/2020	12/17/2020	10/6/2020	12/17/2020
+ 5.1	Furnish & Haul Hot Mix	10/6/2020	11/16/2020	10/6/2020	11/16/2020	10/6/2020	11/16/2020
+ 5.2	Install Hot Mix Type A	11/16/2020	12/17/2020	11/16/2020	12/17/2020	11/16/2020	12/17/2020
6	36 Inch RCP Culvert Class III	12/17/2020	1/20/2021	12/17/2020	1/20/2021	12/17/2020	1/20/2021
+ 6.1	Furnish RCP Materials	12/17/2020	12/24/2020	12/17/2020	12/24/2020	12/17/2020	12/24/2020
+ 6.2	Excavate RCP Trench	12/24/2020	12/31/2020	12/24/2020	12/31/2020	12/24/2020	12/31/2020
+ 6.3	Install RCP Pipe	12/31/2020	1/6/2021	12/31/2020	1/6/2021	12/31/2020	1/6/2021
+ 6.4	Backfill RCP Pipe	1/6/2021	1/20/2021	1/6/2021	1/20/2021	1/6/2021	1/20/2021

12.2.5 Export Copy of MS Project File

If your project's schedule is integrated with MS Project, you can export a copy of your MS Project file. This can be advantageous if a preliminary schedule is needed for a starting point schedule, as the project goes into execution. Recreating the schedule from scratch can be time consuming and error prone, as the existing schedule details might not be properly captured in the beginning stages.

File	e Setup Estim	ate Quote P	rice Execution	System Int	egrations A	Actions	More Act	ions				
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	unt Code Utilization : Breakdown Structures	Resources	urce Utilization urce Cost Details urce Employments	Workbook	Schedule	Cash Flo	W Indirect Cost Item	%	lob Finar Price % / Prime Bor	Add On Price Bre	akdown
	Breakdown St	tructures	Resour	ces	Workbook	💽 Ор	en MS Pr	piect		Cost		Overhead and Pr
Cos	st Breakdown Structu	ıre (CBS) Register 🛛 🕻						nate from Proje	ect			
Oraș	g columns here to group					🧬 Upo	date Proje	ect from Estima	te			
	CBS Position Code 🚞	Description		Optional Code		Exp		of MS Project	File		Total Cost (Forecast)	Subject Cost
÷		JOB					20.00	Mile	\$294,	138.13	\$5,882,762.51	
	+	Prime Bond		PRIME BOND			1.00	1.00 Lump Sum	Sum \$47,14	148.68	\$47,148.68	
	+	Price % Add-On		PRICE % ADD-ON	I		1.00	Lump Sum	\$295,	638.13	\$295,638.13	
	+	Job Financing		FINANCE EXPENSE	E		1.00	Lump Sum	\$33,	105.26	\$33,105.26	
	+	Indirect Cost Escala	tion	INDIRECT COST E	SCALATION		1.00	Lump Sum	\$2,	131.11	\$2,131.11	
	+	Direct Cost Escalation	n	DIRECT COST ESC	CALATION		1.00	Lump Sum	\$15,	048.80	\$15,048.80	
	+	Indirect Cost Add-0	n				1.00	Lump Sum	\$5,	888.67	\$5,888.67	\$294,433.42
	+	Direct Cost Add-On		DIRECT COST ADI	D-ON		1.00	Lump Sum	\$104,	088.34	\$104,088.34	\$5,204,417.24
	□ 1	SITEWORK & ROAD	VAY	200			1.00	Each	\$2,464,	161.56	\$2,464,161.56	
	+ 1.1	Mobilization		641 0 100			1.00	Lump Sum	\$11,	909.51	\$11,909.51	

12.2.6 Manage Changes Between Estimate and Schedule

As changes to scope, resources, and costs come up in your estimate, and changes to relationships and dates occur in the schedule, you can continue updating your estimate and schedule as needed.

12.2.6.3 Plug Days

The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab. For example, your 10" PVC Pipe activity may have extra days in the schedule due to the delivery date of the pipe material, but you don't want those extra days to drive the costs in your estimate, since your crews won't be working on the activity on those extra days.

TIP All superior cost items are hard-coded to use Schedule Plug Days.

Step by Step — Schedule Plug Days

- 1. Look at the Days (Duration driven) column in the CBS where it shows 4.65 days for Excavate RCP Trench.
- 2. Make sure the **Schedule Plug Days** checkbox is selected on the Excavate RCP Trench cost item, and then enter a Plug Days duration for the number of days the item will be scheduled in Primavera (**7** days).

CBS Position Code 🗎	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	\checkmark	26.01
+ 6.1	Furnish RCP Materials	0.00	\checkmark	5.00
+ 6.2	Excavate RCP Trench	4.65	\checkmark	7.00
+ 6.3	Install RCP Pipe	4.10		4.00
+ 6.4	Backfill RCP Pipe	9.92		9.92

• This allows you to maintain your duration of 4.65 days in the estimate and 7 days in the schedule.

Any duration changes made in Project will import into InEight Estimate as Plug Days automatically so that they can be reviewed by the estimator before making any changes to production in InEight Estimate.

12.2.6.4 Update Microsoft Project with InEight Estimate Changes

The following steps will walk you through updating the schedule with a scope change in your estimate.

Step by Step — Update MS Project with InEight Estimate Changes

- 1. In the InEight Estimate Training Job, from the Estimate tab, select Cost Breakdown Structure.
 - In this scenario, there is a scope change for your Excavation requiring you to change all of your quantities
- 2. Change the quantity in the Forecast (T/O) Quantity field in the CBS as specified below.

Quantity Change for Cost Item							
CBS Code	Description	Old Quantity	New Quantity				
5	Asphalt Concrete Hot Mix Type A	35,000	25,000				

- As you make your changes, take note of how your duration changes in the **Days (Duration driven)** column for these items.
- If prompted about changing Total or Unit Cost, select **Change TOTAL cost**, so that your unit costs stay intact

•	Attention	
	anged the quantity for a cost item that already contains costs. like the TOTAL cost to change or the UNIT cost?	
<u> </u>	TOTAL cost JNIT cost	
Deactivation and ALW.	te this confirmation for quantity changes FOR ALL JOBS AYS change the TOTAL cost	
	te this confirmation, choose Tools > Activate Unit/Total n for Quantity Changes.	
	ОК	ן

- 3. From the Estimate tab, select **Schedule>Update Projectfrom InEight Estimate** to send the changed hours to Microsoft Project.
- 4. Go back to the **Training Job** in Microsoft Project.
 - The Microsoft Project scheduled duration should have changed from 4.65 days to 7 days to match the updated duration in InEight Estimate for Excavate RCP Trench
 - You can also see that the days for Asphalt Concrete Hot Mix Type A and its subordinates

0	01 - CBS Position Code	Description -	Duration 👻	Start 👻	Finish 👻
0	0	⊿ JOB	239.51 days?	Mon 2/3/20	Fri 1/1/21
1	1	Mobilization	10 days?	Mon 2/3/20	Fri 2/14/20
2	2	Clearing & Grubbing	10 days?	Mon 2/17/20	Fri 2/28/20
3	3	Unclassified Excavation	1 day?	Mon 3/2/20	Mon 3/2/20
4	4	⊿ Aggregate Base	155 days?	Tue 3/3/20	Mon 10/5/20
5	4.1	Furnish & Haul Base Material	45 days?	Tue 3/3/20	Mon 5/4/20
6	4.2	Finegrade Subgrade	40 days?	Tue 5/5/20	Mon 6/29/20
7	4.3	▲ Install Aggregate Base	70 days?	Tue 6/30/20	Mon 10/5/20
8	4.3.1	Place Aggregate Base	30 days?	Tue 6/30/20	Mon 8/10/20
9	4.3.2	Blue Top Aggregate Base	40 days?	Tue 8/11/20	Mon 10/5/20
10	5	A Asphalt Concrete Hot Mix Type A	37.5 days?	Tue 10/6/20	Thu 11/26/20
11	5.1	Furnish & Haul Hot Mix	20.83 days?	Tue 10/6/20	Tue 11/3/20
12	5.2	Install Hot Mix Type A	16.67 days?	Tue 11/3/20	Thu 11/26/20
13	6	▲ 36 Inch RCP Culvert Class III	26.01 days?	Thu 11/26/20	Fri 1/1/21
14	6.1	Furnish RCP Materials	5 days?	Thu 11/26/20	Thu 12/3/20
15	6.2	Excavate RCP Trench	7 days?	Thu 12/3/20	Mon 12/14/20
16	6.3	Install RCP Pipe	4.1 days?	Mon 12/14/20	Fri 12/18/20
17	6.4	Backfill RCP Pipe	9.92 days?	Fri 12/18/20	Fri 1/1/21

adjusted because you adjusted the Forecast T/O Quantity in InEight Estimate

5. Your Start and Finish dates are different now. In InEight Estimate, from the Estimate tab, select **Schedule >Update InEight Estimate from Project** to update InEight Estimate with the new dates.

CBS Position Code 🗎	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/2020
3	Unclassified Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.1	Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.2	Embankment	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
□ 4	Aggregate Base	3/3/2020	10/5/2020	3/3/2020	10/5/2020	3/3/2020	10/5/2020
+ 4.1	Furnish & Haul Base Material	3/3/2020	5/4/2020	3/3/2020	5/4/2020	3/3/2020	5/4/2020
+ 4.2	Finegrade Subgrade	5/5/2020	6/29/2020	5/5/2020	6/29/2020	5/5/2020	6/29/2020
■ 4.3	Install Aggregate Base	6/30/2020	10/5/2020	6/30/2020	10/5/2020	6/30/2020	10/5/2020
+ 4.3.1	Place Aggregate Base	6/30/2020	8/10/2020	6/30/2020	8/10/2020	6/30/2020	8/10/2020
+ 4.3.2	Blue Top Aggregate Base	8/11/2020	10/5/2020	8/11/2020	10/5/2020	8/11/2020	10/5/2020
5	Asphalt Concrete Hot Mix Type A	10/6/2020	11/26/2020	10/6/2020	11/26/2020	10/6/2020	11/26/2020
+ 5.1	Furnish & Haul Hot Mix	10/6/2020	11/3/2020	10/6/2020	11/3/2020	10/6/2020	11/3/2020
+ 5.2	Install Hot Mix Type A	11/3/2020	11/26/2020	11/3/2020	11/26/2020	11/3/2020	11/26/2020
= 6	36 Inch RCP Culvert Class III	11/26/2020	1/1/2021	11/26/2020	1/1/2021	11/26/2020	1/1/2021
+ 6.1	Furnish RCP Materials	11/26/2020	12/3/2020	11/26/2020	12/3/2020	11/26/2020	12/3/2020
+ 6.2	Excavate RCP Trench	12/3/2020	12/14/2020	12/3/2020	12/14/2020	12/3/2020	12/14/2020
+ 6.3	Install RCP Pipe	12/14/2020	12/18/2020	12/14/2020	12/18/2020	12/14/2020	12/18/2020
+ 6.4	Backfill RCP Pipe	12/18/2020	1/1/2021	12/18/2020	1/1/2021	12/18/2020	1/1/2021

Lesson 12 Review

- 1. Under the Job Properties > Schedule tab, which setting can be enabled to account for plugged costs (e.g., for subcontractors)?
 - a. Resource price/unit
 - b. Expense Costs
 - **c**. Schedule ID
 - d. Actuals
- 2. For InEight Estimate schedule integration with Primavera, which of the following can be sent from your estimate to the schedule? (Select all that apply)
 - a. Activity data
 - b. Cash Flow graphs
 - C. Resource data
 - d. Cost data
 - e. Price data
- 3. The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab.
 - a. True
 - b. False

Lesson 12 Summary

As a result of this lesson, you can:

- Set up scheduling options
- Update Schedule from InEight Estimate
- Update InEight Estimate from Schedule
- Manage changes between estimate and schedule

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LESSON 13 – CASH FLOW

Lesson Duration: 25 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Interpret cash flow and resource utilization on the Cash Flow graph
- Select Cash Flow Options
- Change Cash Flow Display Settings

Lesson Topics

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13.3 Cash Flow Display Settings	.239
13.3.1	.239
13.3.2 Cost Items and Cost Categories	.239
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13.1 CASH FLOW

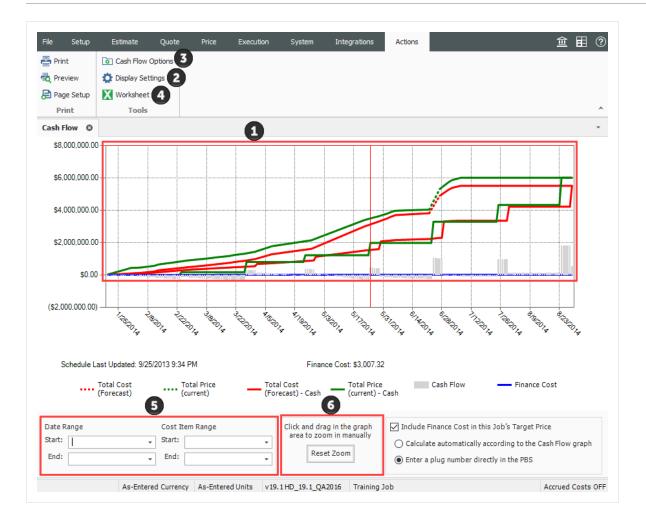
The Cash Flow form provides a graphical representation of the cash flow and resource utilization of your project, so you can quickly assess financing and resource needs.

You can open the Cash Flow form by selecting the **Estimate** tab from the Estimate landing page, then selecting **Cash Flow** from the Schedule section.

In order to generate a cash flow curve the estimate must be populated with schedule dates either directly from integration with Primavera, Microsoft project, or input manually.

Section	Description
1	 The graph displays the projected cash flow of your project, along with job financing expense, individual cost category costs and resource utilization. The x-axis measures time The left y-axis measures amounts The right y-axis measures quantities (when resource utilization is displayed) All graphs depicted on the Cash Flow form can be displayed based on Pay Quantity or Forecast (T/O) Quantity
2	 Click on the Display Settings icon to indicate what to display on the graph. You can display total costs and price or specific cost categories You can also set the display settings to report on Resource Utilization
3	Click on the Cash Flow Options icon to specify revenue timing, cost timing, and cost of money.
4	Click the Excel icon to export the numerical data represented on the graph into an Excel spreadsheet where you can run additional analysis.
5	You can filter the Cash Flow graph by date range or by a range of cost items.
6	Click and drag over the graph to zoom in on a particular section. Click the Reset Zoom button to restore the graph to its original state.

Overview – Cash Flow Form



13.2 CASH FLOW OPTIONS

The Cash Flow Options are used to define the cash flow rules (revenue timing, cost timing, cost of money, and quantities) needed to calculate the finance expense and cash flow for your project.

Cash flow rules (revenue timing, cost timing, cost of money, and quantities) describe how cash flow occurs between a contractor and a client, and between contractors or owners and vendors/subcontractors. Cash flow is then calculated based on both the earning and payment terms you specify, and the job's schedule and pay item prices.

To open the Cash Flow Options, click on the **Cash Flow Options** icon in the Tools section of the Actions tab.

TIP

You can also access Cash Flow Options from the Setup > Job Properties > Cash Flow tab.

- 1. **Revenue timing**: Revenue is the amount of money actually paid to a contractor by the client for the completion of project deliverables. This section contains options to specify when and how often payment is recieved.
- 2. **Cost Timing**: Cost is the amount of money expended to complete the scope of the project. This section contains options to specify when and how often you pay contractors, subcontractors and vendors.

NOTE To include any of your costs in your cash flow (including indirect costs), they need to be scheduled

- 3. **Cost of Money:** Represents the financing cost to fund the project. This section contains fields to specify interest rates you pay for the money you borrow, and interest rates you earn for money invested, to determine a total Finance Cost.
- 4. **Quantities:** Allows you to calculate cash flow based on pay quantities or forecast (T/O) quantities.
- 5. **Dates:** By default, the scheduled Early Start and Early Finish dates of each cost item (and its resource employments) as listed in the CBS Register, provide the timing of the expenses, revenue, and costs that show up on the Cash Flow graph. You have the option to base cash flow timing on Start/Finish dates or Late Start/Finish dates.

ile Setup	e Estimate	Quote	Price	Execution	System	Integration	IS				1	Ì	(
b Properties	Foundation Setup Data -	Pay Item 8 Proposal	Bid Wizard	Resource	Labor Equipment Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	Reports				
- h el	Initializ	-			Resources		Assen	iblies	Reports				_
ash Flow	Job Prope												
		er Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folde	r Tags C	Competitors	Pricing	Schedule	4	
Bills are su	bmitted to the o	wner:	Avera	ige calendar day	s elapsed fror	n billing to coll	ection:	3) day	s			
O At the	end of the job		Amou	int of each billin	g that is withh	eld by owner a	s retainage:		5.00 %				
Every r	month on this da	y 25	Retai	nage is released		At the end of t	ne job						
O Every					\bigcirc	On a specific d	ate:		*				
O Every			Sp	read revenue us	ing the same (Cost Curves as	the contribut	ing Cost Ite	ems				
· ·													
At the Every r	end of the job month on this da		Amou Retai subco	ige calendar day int of each invoi nage is released ontractors and vi oply cash timing en if their cost s	ce received the to ① At endors: ② Or	at is withheld b the end of the n a specific dat	y you as ret; job e:	ainage:					
	nual interest ration				ds [Pay Quantit	y (0) Quantity				
		(11			L				-, quantity				
Reporting Per	iods						Date	5					
Period sett	ing for cash flow	: Day	•				Ea	rly Start / Fi	nish 👻				
													_
										ОК		Cancel	_

13.2.0.1 Cash Flow Options Set Up

The following steps walk you defining settings on the Cash Flow Options form.

Step by Step — Cash Flow Options Setup

1. In the E101 – Training Job, from the Estimate tab, select Setup >Job Properties >Cash Flow.



- You will see the default options already there
- You will adjust a few of those options
- 2. Change your Revenue timing to **Every month on the 10th**.

• The average calendar days from billing to collection should be set to 25 days

Overview Security Cover Sheet	Cost Bas	is Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitor	s Pricing	Schedule	Cash Flov
Revenue timing 2		•					_		
Bills are submitted to the owner:	1	Average calendar days	s elapsed from	m billing to collect	tion:	25 d	lays		
 At the end of the job 	,	Amount of each billing	that is withh	eld by owner as r	etainage:	5.00 %	6		
• Every month on this day 10	1	Retainage is released:		At the end of the	job				
O Every 1 weeks	·		0	On a specific date	e:	-			
O Every 1 days		Spread revenue usi	ng the same (Cost Curves as th	e contributing Cos	t Items			

- 3. For Cost timing, bills are received from subcontractors and vendors Every month on the 25th.
 - Average calendar days elapsed from receipt of invoice to payment should be set to 30 days

Bills are received from subcontractors and vendors:	Average calendar days elapsed from receipt of invoice to payment: 30 days
 At the end of the job Every month on this day 25 	Amount of each invoice received that is withheld by you as retainage: 5.00 % Retainage is released to subcontractors and vendors: On a specific date:
Every 1 weeks Every 1 days	Apply cash timing rules for all procurable cost categories (non labor and equipment) even if their cost source is not set to "Quote"?

4. For Cost of money, enter **10%** for the Average annual interest rate paid to borrow money (when cost exceeds revenue) and **2%** for Average annual interest rate earned (when revenue exceeds cost).

Cost of money	
Average annual interest rate paid to borrow money (when cost exceeds	10.00 %
Average annual interest rate earned (when revenue exceeds cost):	2.00 %

5. Leave all remaining options as originally defaulted.

13.3 CASH FLOW DISPLAY SETTINGS

13.3.1

13.3.2 Cost Items and Cost Categories

The Cash Flow Display Settings allow you to control what information displays on the Cash Flow graph. To open the Display Settings click on the **Actions > Display Settings** • icon in the Tools section.

Overview – Cash Flow Display Settings – Cost Items and Cost Categories

Section	Description
1	You can save your display settings for future use.
2	Select how the graph measures the timing of your cash flow. Options include: Day, Week, Month, Quarter, and Year.
3	 Under the Cost Items section, you can select: Total Cost (Forecast): The total cost of your scheduled cost items, based on when your costs are accrued (when your cost items are scheduled). This is displayed as a dashed line on the graph Total Price (current): The total revenue of your pay items, based on when the revenue is earned (when your cost items are scheduled). This is displayed as a dashed line on the graph Total Cost (Forecast) - Cash: The total cost of your scheduled cost items, reflecting the cost timing you specify in the Cash Flow Options. This is displayed as a solid line on the graph Total Price (current) - Cash: The total revenue of the pay items, reflecting the revenue timing you specify in the Cash Flow Options. This is displayed as a solid line on the graph Cash Flow: Displays the difference between your Total Cost - Cash and Total Price - Cash values, so you can see if you are making or losing money Finance Cost: Displays the Cost of Money amount calculated from the settings you specify in the Cash Flow Options
4	You can check the Estimated box for any specific cost categories you need to display.

• The other check boxes are used for InEight Estimate Performance

ettings: Default	Cost Categories				Resources				
] Display this text Dustom report	title:	Estimated	As-Built	Planned To Date	Resource Utilization				
	∧ Labor				Summarize resources by:	Resource	е Туре		\sim
2	V Owned Equipment						utilized re y resource		
eriod Day ·	 Rented Equipment 				Value	Qty	Cost	AB Qty	AB Cost
Cost Items	Supplies				Labor				
Total Cost (Forecast)	Materials				Construction Equipment Rented Construction Eq				
Total Price (current)	Subcontract				Installed Equipment				
☑ Total Cost (Forecast) - Cash	Fees				Unique				
✓ Total Price (current) - Cash	Allowance								
Cash Flow	Custom Category1								
Finance Cost	Undefined				Quantity:	Cos	t		
As-Built		4			None 🗸	Nor		\sim	
CE-Total Cost					As-Built Quantity: None	As-I	Built Cost: ne	\sim	

13.3.2.1 Cash Flow Display Set Up

The following steps walk you through setting up your Cash Flow Display Settings.

Step by Step — Cash Flow Display Settings Set Up

- 1. In the E101 Training Job, from the Estimate tab, select Cash Flow from the Schedule section.
- 2. On the Actions tab, select Display Settings to open the Display Settings window.
- 3. From the Period drop-down list, select **Week**.
- 4. Under the Cost Items section, make sure the following are selected:
 - Total Cost (Forecast)
 - Total Price (Forecast)
 - Total Cost (Forecast) Cash
 - Total Price (Forecast) Cash
 - Cash Flow

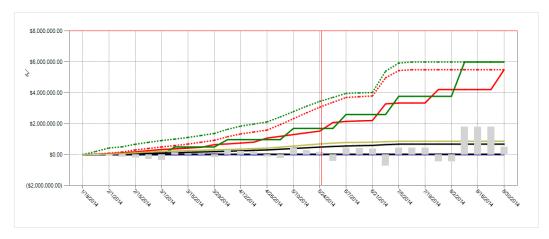
• Finance Cost

Cost Items	
✓ Total Cost (Forecast)	
✓ Total Price (current)	
☑ Total Cost (Forecast) - Cash	
☐ Total Price (current) - Cash	
Cash Flow	
Finance Cost	
⊠ As-Built Total Cost	
CE-Total Cost Earned (to-date)	

5. Under the **Cost Categories** section, check the **Estimated** checkbox for the Labor and Owned Equipment categories.

Cost Categories						
	Estimated					
Labor						
Owned Equipment						

- 6. Click **OK** to close the Display Settings window.
 - Your Total Cost (Forecast) displays as a dashed red line, indicating your accrued costs based on when your cost items are scheduled and the assigned cost curves for each cost item.
 - Your Total Price (current) displays as a dashed green line, indicating the revenue you've earned, based on the timing of your pay items
 - Your Total Cost (Forecast) Cash displays as a solid red line, indicating your costs, based on when your cost items are scheduled *and* the cost timing defined in Cash Flow Options
 - Your Total Price (current) Cash displays as a solid green line, indicating your revenue, based on the timing of your pay items *and* the revenue timing defined in Cash Flow Options
 - Your Cash Flow displays grey bars indicating when your cash flow is negative or positive



• Your Finance Cost displays as a blue line on the graph

7. To filter your graph by date range, click on the **Start** drop-down arrow - and select a start date of your date range filter.

					1.		<i>.</i>		<i>.</i>	9.
			Thursday, December 27, 2018							4112014
	-			Febr	uary 2	2014			►	
		SU	MO	TU	WE	TH	FR	SA		
		26	27	28	29	30	31	1		
		2	3	4	5	6	7	8		
		9	10	11	12	13	14	15		otal Cost
		16	17	18	19	20	21	22		Forecast) - C
		23	24	25	26	27	28	1		
		2	3	4	5	6	7	8		
Date Ra					Clear					
Start:	2/3/2	014			Ŧ	Start:				-
End:					-	End:				-
							4			

8. Click on the **End** drop-down arrow - and select an end date of your date range filter.

- Your graph now only includes your cost items that fall within the specified date range
- 9. To remove the filter, click in the **Start** field and press the **Backspace** key.
- 10. Do the same for the End field.

13.3.3 Resource Utilization

You can also use the Cash Flow graph to report on resource utilization. For example, you may want to run a report that displays a work hours curve for a particular labor trade or to see the peak usage times for a particular piece of heavy equipment.

You can run resource utilization graphs based off of any of the following:

- Resource Type
- Resource Code
- Description
- Organizational Category
- Tag 1, 2, and 3
- Quote Group
- Account Code and Cost Item Account Code
- Fuel Type

You set up your resource utilization settings from the same Display Settings window you use for setting up Cash Flow, **Display Settings** • in the Tools section of the Actions menu.

ettings: Previous	Cost Categories				Resources			
Display this text as a custom report title:		Estimated	As-Built	Planned To Date	Resource Utilization			
A	Labor				Summarize resources by:	Description		\sim
~	Owned Equipment				-	This job's utilize All Library reso		
eriod Week 🗸	Rented Equipment				Value	Qty Co:	st AB Qty	AB Co 🖍
Cost Items	Supplies				Dozer D8			
Total Cost (Forecast)	Materials				Dump Fees			
Total Price	Subcontract				Excavator 225 Excavator 245			
Total Cost (Forecast) - Cash	Fees				Feeder Controls			
☐ Total Price (current) - Cash	Allowance				Finisher			<u>+</u>
Cash Flow	Custom Category1				Form Materials			, ,
Finance Cost	Undefined				Quantity:	Cost:		
As-Built Total Cost					None ~	None	\sim	
CE-Total Cost					As-Built Quantity: None ~	As-Built C None	ost: V	

13.3.3.2 Resource Utilization Display Set Up

The following steps walk you through setting up your Cash Flow graph to report on Resource Utilization.

Step by Step — Resource Utilization Display Setup

- 1. In the E101 Training Job, from the Estimate tab, select CashFlow from the Schedule section.
- 2. On the Actions tab, select **Display Settings** to open the Display Settings window.
- 3. Make sure the all checkboxes are unchecked under the Cost Items and Cost Categories sections.
- 4. Under the Resources section, check the **Resource Utilization** checkbox.
- 5. From the Summarize resources by drop-down list, select **Description**.

Resources		
Resource Utilization		
Summarize resources by:	Description	\sim
	This job's utilized resources All Library resources	

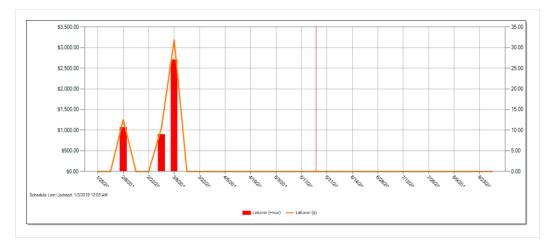
- 6. From the resulting list of Values, select **Laborer**.
- 7. Click in the **Qty** field for the selected value and select a color of your choice.
 - In this case the Qty represents the work hours for your Laborer resource
- 8. Click in the **Cost** field for the selected value and select a different color of your choice.

Get data from:	This job's utilized resources All Library resources							
Value	Qty	Cost	AB Qty	AB Co				
Laborer								
Lowboy Trailer								

9. From the **Quantity and Cost** drop down lists, you can select how your quantities and costs will display on the graph. In this case select the Quantity to display as a **Bar** and Cost to display as a **Line**.

Value	Qty	Cost	AB Qty	AB Co ^
Labor Foreman				
Laborer Loader 950				
Lowboy Trailer				<u> </u>
Manhole Precast 4 Ft				
<				>
Quantity:	Cost:			
Bar 🗸 🗸	Line		\sim	

- 10. Click **OK** to close the Display Settings window.
 - The graph now displays the utilization of your Laborer resource, showing the work hours and costs used over time



The graphs displayed on the Cash Flow form are based on the estimated cost of each cost item and its resource employments (in the case of resource utilization).

Lesson 13 Review

- 1. Under what cash flow form can you set up your revenue and cost timing?
 - a. Cash Flow Options
 - b. Display Settings
 - c. Worksheet
 - d. Page Setup
- 2. By default, the red dashed line on the Cash Flow graph represents the:
 - a. Total Cost (Forecast)
 - b. Total Price (current)
 - C. Total Cost (Forecast) Cash
 - d. Total Price (current) Cash
- 3. In the Cash Flow Display Settings, Resource Utilization allows you to view a graphical summarization of your resources by which of the following? (Select all that apply)
 - a. Resource File Description
 - b. Resource Type
 - C. Resource Code
 - d. Description
 - e. Wage Zone
 - f. Organizational Category

Lesson 13 Summary

As a result of this lesson, you can:

- Interpret cash flow and resource utilization on the Cash Flow graph
- Select Cash Flow Options
- Change Cash Flow Display Settings



LESSON 14 – INEIGHT ESTIMATE CALCULATORS

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Use the Haul Calculator
- Use the Trench Calculator
- Use the In-Field Calculator

Lesson Topics

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14.1 HAUL CALCULATOR

The **Haul Calculator** allows you to enter the specifics of up to three haul routes (distance, travel speed, etc.). Once entered, you can either:

- Calculate the number of trucks required to complete the haul in a set amount of time, or
- Calculate how long it will take to complete the haul with a set number of trucks

The following activity walks step by step through using the Haul Calculator to calculate the number of trucks needed for a cost item.

Step by Step — Haul Calculator – Calculate Quantity of Trucks

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Open cost item 4.1 Furnish & Haul Base Material.
- 3. On the Cost Item Record, click the **Detail tab**.
- 4. Right click on the ETDT Dump Truck row header and select Open Haul Calculator.

Cost Item Summary		🍃 <u>D</u> etail	\$11.54	🛱 Plu <u>a</u> : \$0	.00	Quote : \$0.00
)rag (columns here to g	roup				
	Row Number 📒	Code	Resource	e Assembly	De	scription
-	+ 1	LT1			Te	amster
→ [·	+ 2	ETDT			Du	mp Truck
Ľ	<u>O</u> pen				Ag	gregate Base Rock
8	<u>D</u> elete					
8<	Cu <u>t</u>					
믭	Cop <u>v</u>					
Ē	<u>P</u> aste					
+	Fill Down					
8	Link this field to	Excel				
	UnLink from Ex	cel				
2.	Insert <u>R</u> esource	•				
12	Insert Resource	e <u>A</u> ssembly				
1	Open <u>H</u> aul Calo	ulator				
# 15	Edit Resource F	Periods				

5. On the Haul Calculator, select the **Calculate quantity of ETDT required to complete haul in duration entered below** radio button. (ETDT is the resource code for the Dump Truck you selected.)



- 6. For the Haul Distance, type 5.
- 7. Enter an Average Payload (Ton) of 30.
- 8. For Load Time (Minutes), type 3.
- 9. Enter a Travel Speed Full of 35 Mile/Hour.

- 10. For **Dump Time (Minutes)**, type **2**.
- 11. Enter a Travel Speed Empty of 45 Mile/Hour. Notice this calculates a cycle time of 20.24.
- 12. Enter a Work Efficiency of 90 percent.

	Route 1
Quantity (Ton)	45,000.00
Haul Distance - One Way (Mile)	5.00
Average Payload (Ton)	30.00
Total Loads	1,500.00
Load Time (Minutes)	3.00
Travel Speed Full (Mile/Hour)	35.00
Dump Time (Minutes)	2.00
Travel Speed Empty (Mile/Hour)	45.00
Cycle Time (Minutes)	20.24
Work Efficiency (%)	90.00
Total Hauler Hours	562.17
Hours Per Shift	8.00

• The calculator shows a result of 1.56 concurrent haulers

Quantity of resource ETDT	1.56	0.00	0.00	1.56	Concurrent Haulers
Total duration (Hours)	0.00	0.00	0.00	360.00	Hours

- 13. Click **OK**.
- 14. Your cost item now shows a quantity of 1.56. Round up the Quantity to **2**. Also, adjust the Teamster Quantity to **2** (if needed).

Row Number =		Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure
+	1	LT1		Teamster			2.00	Each
+	2	ETDT		Dump Truck			2.00	Each
+	3	MBR		Aggregate Base Rock	45,500.00	5.00	47,775.00	Ton

Step by Step — Haul Calculator – Calculate Total Duration

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Open cost item 4.1 Furnish & Haul Base Material.
- 3. On the Cost Item Record, click the **Detail** tab.
- 4. Change your Teamster and Dump Truck quantities back to **2 each**.
- 5. Right click on the ETDT Dump Truck row header and select Open Haul Calculator.
- 6. On the Haul Calculator, select the **Calculate total duration of haul using quantity of ETDT entered below** radio button.
 - With the previous information you entered still there, the calculator calculates a total duration of 281.08 hours

 Calculate quantity of ETDT required to 	complete haul in du	ration entered belov	N		
Calculate total duration of haul using q	uantity of ETDT ente	ered below			
	Route 1	Route 2	Route 3	TOTAL	
Quantity (Ton)	45,000.00	0.00	0.00	45,000.00	Ton
Haul Distance - One Way (Mile)	5.00	0.00	0.00	5.00	Mile
Average Payload (Ton)	30.00	0.00	0.00	30.00	Ton
Total Loads	1,500.00	0.00	0.00	1,500.00	
Load Time (Minutes)	3.00	0.00	0.00	3.00	Minutes
Travel Speed Full (Mile/Hour)	35.00	0.00	0.00	35.00	Mile/Hour
Dump Time (Minutes)	2.00	0.00	0.00	2.00	Minutes
Travel Speed Empty (Mile/Hour)	45.00	0.00	0.00	45.00	Mile/Hour
Cycle Time (Minutes)	20.24	0.00	0.00	20.24	Minutes
Work Efficiency (%)	90.00	100.00	100.00	90.00	%
Total Hauler Hours	562.17	0.00	0.00	562.17	Hours
Hours Per Shift	8.00	8.00	8.00	8.00	
Results					
Quantity of resource ETDT	0.00	0.00	0.00	2.00	Concurrent Hauler
Total duration (Hours)	281.08	0.00	0.00	281.08	Hours

- 7. Click **OK**.
 - The Hours field on the Production tab updated to 281.08
 - Your ETDT Dump Truck quantity remains at 2

14.2 TRENCH CALCULATOR

The **Trench Calculator** allows you to quickly calculate trench, pipe, and bedding values. You can perform pipe-related take-off by defining the details of the trench (e.g., length, depth, width, hinge elevation, backslope, and swell factor), the pipe (diameter, elevation, and waste factor), and up to four beddings.

With this information, the Trench Calculator can automatically calculate:

- Total excavation volume (neat-line)
- Total excavation volume (including swell/shrinkage)

- Total pipe to purchase
- Lift Volume (for up to four beddings)
- Lift Weight (for up to four beddings)

You can use these calculations to define certain cost item setup data:

- You can use the Total Excavation Volume that is calculated as the quantity of the cost item
- You can use the Total pipe to purchase calculation as the quantity of a resource (e.g., pipe) that has been employed to the cost item
- You can use the Lift Volume or Lift Weight that is calculated as the quantity of a resource employed to the cost item in either cubic yards or tons
- You can click the Toggle English / Metric button at the bottom of the dialog to switch between the English and Metric systems for entering data
- TIP You can access the Trench Calculator from the Actions tab of a Cost Item Record
- NOTE When copying cost items in a job or from job to job, the Trench Calculator variable data is included with the data being copied. When a cost item is copied to the clipboard, Trench Calculator variable data is also included.

14.2.1 Trench Calculator – Trench Tab

The following steps walk through using the Trench Calculator to take-off excavation volume.

Step by Step — Trench Calculator – Trench

- 1. Open the **Training Job** and from the Estimate tab, select **Cost Breakdown Structure**.
- 2. Create a new cost item from the bottom row of your CBS and call it **24**" **Pipe**.
- 3. Add the following three subordinates and update their Units of Measure:
 - Excavate Trench: CY
 - Install Pipe: LF
 - Backfill Trench: CY
- 4. Open the Excavate Trench Cost Item Record. Add the following resources:

- LL2 Laborer 1
- LO2 Operator Class 2 1
- EX245 Excavator 245 1
- 5. Adjust the Production to: **100 CY/Hour**.

Cos	t Item Summar	У	Detail :	\$1.74 V Plug : \$0.0	0 Quote : \$0.00	Allocation	Production				×
Drag	columns Firede	[Se	arch For]	··· Saved views	: Previous View	•		Days:	0.00	0.0	0
	Row Number 😑	T	Code	Resource Assembly	Description	Quantity		Shifts:	0.00	0.0	0
_	Number —	_				(Less Waste)		Hours:	0.01	0.0	0
	+	-	LL2		Laborer			Man-Hours:	0.02	0.0	0
	+	-	LO2 EX245		Operator Class 2 Excavator 245		E	quip-Hours:	0.01	0.0	0
→		-	1					CY/Day:	800.00	0.0	0
							_	CY/Shift:	800.00	0.0	0
								CY/Hour:	100.00	٥.0	0
								CY/Man-Hr:	50.00	0.0	0
						Þ		_	a0 A1		×

6. On the Cost Item Record's Actions tab, select **Trench Calculator**.

Training Job - Estimate	: 	-
System Integratio	ns Actions	1
ue (Delta) Resource Fields	🛓 Edit Resource Periods	Trench Calculator
ue (Delta) Cost Item Fields	🔚 Insert Subordinate	🔝 Shift / Rate Calculator
	🔏 Break Cost Allocation Link	
	Тоо	ls
rd ©		Trench Calculator
t (T/O) Qty: Unit of Meas	sure: Unit Cost:	Total Cost: Currenc
	-	
1.00 Each	\$1.74	\$1.74 U.S. Do

- 7. For Trench Length, type 1000.00 feet.
- 8. For Trench Width (at the bottom) type 4.00 feet.
- 9. Enter a Trench Depth of 10.00 feet.
- 10. Enter a Hinge Elevation of 5.00 feet.

- 11. Enter a **Backslope** of **45** degrees.
- 12. Define the Material Swell/Shrinkage Factor (fraction expressed as a decimal) at .10.
 - You can select either a "neat-line" total volume or include swell/shrinkage
- 13. Select the "Total excavated volume (including swell/shrinkage)" checkbox.

		Trench	Pipe	Beddings		
		Variables				
			Tren	ch length:	1000.0	0 feet
		Trench	width (at bottom):	4.0	feet
			Tre	nch depth:	10.0	feet
			Hinge	elevation:	5.0	feet
				Backslope:	45.0	degrees
		Materi	al swell/	shrinkage factor:	0.1) (decimal)
		Results				
\mathbf{X}		Tota	l excava	tion volume (neat-line):	2,407.41	CY
				olume as the his cost item		
				ated volume /shrinkage):	2,648.15	cr
				olume as the his cost item	V	
ave Configuration to Library	Load Configuration from Library	Toggle				OK Cancel

- 14. Click **Save Configuration to Library** and save the Trench calculator as **Trench Example** with your initials.
- 15. Click **OK**.

14.2.2 Trench Calculator – Pipe Tab

You can also use the Trench Calculator to take off how much piping and bedding you need for the trench.

Step by Step — Trench Calculator – Pipe

- 1. On the CBS Register, adjust the Forecast T/O Quantity for the Install Pipe cost item to **1000** LF.
 - · Assume this quantity is based off manual take-off calculations you already did
- 2. Open the Install Pipe Cost Item Record.
- 3. Add the Resource Assembly of **CPIPE Pipe Crew** and adjust the production to **300** LF / Day.
- 4. On the Cost Item Record's Actions tab, select Trench Calculator.
- 5. Select Load Configuration from Library.
- 6. Select Trench Example (with your initials).

9									
A	ctions								
Dra	g columns here to group			Find: [Sea	rch For]	S	aved views:	Standard View	•
	Name	Comments	Pipe Diameter	UM	Pipe Type	Pipe Class	Agency	Last Changed	Last Char
\rightarrow	New Trench Configuration (bla		0.00	inches					
	24" PVC Sewer at 10' Deep (1)		26.00	inches				7/29/2009 2:13:19 PM	wmfarr
	Trench Example PB		0.00	inches				2/15/2019 11:59:52 AM	Paul.Benr

- 7. Click **OK**.
- 8. On the Trench Calculator, select the **Pipe** tab.
- 9. Enter the following for the size and position of the pipe:
 - Pipe exterior diameter: 26.00 inches
 - Pipe center elevation (from bottom): 19.00 inches
 - Waste factor: **10**%
- 10. Click on the resource icon to pull up the Resource Rate Register.
- 11. Select the Installed Material tab.
- 12. Select MPP24 Pipe 24" PVC SDR35, then click OK.
 - The Pipe variables you entered should match the following image:

Trenc	h Calculator Trench Pipe Beddings
	Variables Pipe exterior diameter: 26.00 inches Pipe center elevation (from bottom): 19.00 inches Waste factor: 10.00 %
	Results Total pipe to purchase: Use Total Pipe To Purchase as the quantity on this resource (on this cost item):
Save Configuration to Library	Toggle English / Metric OK Cancel

- 13. Click **Save Configuration to Library** and save the Trench calculator as **Trench Example** with your initials.
- 14. When prompted to overwrite the existing saved file, click **Yes**.
- 15. Click **OK** to close the Trench Calculator.

14.2.3 Trench Calculator – Beddings Tab

The following steps walk you using the Trench Calculator to calculate bedding take-offs.

Step by Step — Trench Calculator – Beddings

- 1. Back on the CBS Register, adjust the Forecast T/O Quantity for **Backfill Trench** to **2300** CY, based on manual calculations.
- 2. Open the **Backfill Trench** Cost Item Record.

- 3. Add the following resources:
 - LL2 Laborer 3
 - LO2 Operator Class 2 1
 - RPC Plate Compactor 1
 - EL950 Loader 950 1
- 4. Adjust the Production to **160** CY/Day.
- 5. From the Cost Item Record's Actions tab, select Trench Calculator.
- 6. Select Load Configuration from Library
- 7. Select **Trench Example** (with your initials), then click **OK**.
- 8. On the Trench Calculator, select the **Beddings** tab.
- 9. On the Beddings tab, you can define up to four beddings to backfill the trench
 - The variables you enter will determine how much bedding you need
- 10. Enter the following variables for each bedding:

	Bedding Lift 1	Bedding Lift 2	Bedding Lift 3
Elevation (from trench floor)	6.00	38.00	76.00
Additional material needed	5.00	5.00	5.00
Conversion factor	1.60	1.70	1.60

- Under Results, you can match each of the Bedding Lifts with a material resource, by selecting the **resource** icon and selecting the resource you want to employ from the Material tab
- 11. Selecting the resource from the Tons selection field, select the following materials for each bedding:

	Resource Code	Resource Description
Bedding Lift 1	MASAND	Sand
Bedding Lift 2	MAFA	Fine Aggregate
Bedding Lift 3	MACA1-1/2	Coarse Aggregate

	Trench Calculator
	Trench Pipe Beddings
	● Bedding Lift 1 ○ Bedding Lift 2 ○ Bedding Lift 3 ○ Bedding Lift 4
	Variables
	Elevation (from trench floor): 6.00 inches
	Additional material needed to 5.00 %
	compensate for compaction: 5.00 %
	Conversion factor (TON per CY): 1.60
	Results
	Lift Volume: 77.78 CY
医子子 法中心法 法中心法	Use Lift Volume as the quantity on this resource (on this cost item):
The second se	Lift Weight: 124.44 Tons
the short to the short the	
	Use Lift Weight as the quantity on this resource (on this cost item):
S to F	

12. Click **OK**.

• Note that the pipe and bedding materials are added to the cost item with their quantities

Row Number ៉	T	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure
+	1	LL2		Laborer			3.00	Each
+	2	LO2		Operator Class 2			1.00	Each
÷	3	RPC		Plate Compactor			1.00	Each
+	4	EL950		Loader 950			1.00	Each
+	5	MASAND		Sand	124.44	0.00	124.44	Ton
÷	6	MAFA		Fine Aggregate	593.66	0.00	593.66	Ton
+	7	MACA1		Coarse Aggregate	3,327.59	0.00	3,327.59	Ton

Exercise 14.1 — Trench Calculator

In this exercise, you will practice using the Trench Calculator to take-off piping and bedding materials. Complete the following steps:

- 1. In the **Training Job**, create a new cost item called **Underground Pipe**.
- 2. Give the cost item a quantity and unit of measure of **1640 Linear Feet**.
- 3. Open the new cost item and open the **Trench Calculator**.
- 4. On the Trench tab, enter the variables for the trench:

Trench length	1000 feet
Trench width (at bottom)	4 feet
Trench depth	10 feet
Hinge elevation	5 feet
Backslope	45 degrees
Material swell/shrinkage factor	0.10 (decimal)

- Do NOT check the box to bring in volume shrinkage.
- 5. Select the MPR36 material resource from the drop-down Results list.
- 6. On the **Beddings** tab, enter bedding variables.

Bedding lift 1	
Elevation (from trench floor)	6 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.3

Bedding lift 1

Bedding material resource (Tons)

MASAND

Bedding lift 2	
Elevation (from trench floor)	38 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.1
Bedding material resource (Tons)	MAFA

Bedding lift 3	
Elevation (from trench floor)	76 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.1
Bedding material resource (Tons)	MACA1-1/2

7. Select **OK** and confirm that the pipe material and bedding materials populated the cost item.

You should end up with the following results

CDC	Code:	0.01	tional Code:	Descri	otion						Fores	at (T(0) 0bu	Unit of Measure		Unit Cost:	Total Cost:	Currency:	
CDS	code:	Opi	tional Code:	Descri	ption:						Foreca	st (1/0) Qty:	Unit of Medsure		Unit Cost:	Total Cost:	currency:	
														Ψ.				
														~				
	26			Under	ground Pipe							1,640.00	LF	•	\$34.59	\$56,734.45	U.S. Dollar	
PI A	ssignment:	PIL	Line Number	: PI Des	cription:								Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
	~												Job Overhead	•	1,640.00	Detail +	BASE	,
		_				_	_											
Co	st Item Summar	У	違 <u>D</u> etail :	\$34.59	🛱 Plug : \$0.	.00	Quote : \$0.00	Allocat	ion					Pro	oduction			×
Drag	g columns here	to gr	roup			Find:	[Search For]		Saved	views:	Previous	View	•				Qty Driven Hourly	
	Row Number 🗎		Code	Resource	Assembly	Des		Quantity (Less Wa	ste)	Waste Add-o		Quantity	Unit of Measure		Durati	on Driven Resources	Resources	
	+	1	MPR36			Pipe	RCP 36 In		1,000.00		0.00	1,000.00	Linear Feet		D	avs: 0.00	0.00	
	+	-	MASAND			San	-		101.11		0.00	101.11			Sh	ifts: 0.00	0.00	
÷	+	-	MAFA				Aggregate		384.13		0.00	384.13				urs: 0.00 4	0.00	
	+	4	MACA1			Coa	rse Aggregate		2,153.15		0.00	2,153.15	Ton		Man-Ho		0.00	
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															Equip-Ho	ours: 0.00	0.00	
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Congratulations, you have completed this exercise!

14.3 IN-FIELD CALCULATOR

You can use the In-field Calculator to do simple mathematical calculations in any numeric field on records, registers, and tree lists. You use this calculator much like an Excel workbook field, by inserting the cursor in the field where you want to perform a calculation, then pressing the "=" key, followed by a valid arithmetic expression. To display the calculated result, you press the tab key. The resulting value is stored without the arithmetic expression used to calculate the value.

The following steps walk through using the In-field Calculator to calculate the area of how much sandblasting is needed for painting the steel bridge structure specified in the Training Job.

NOTE

The resulting field value is stored without the arithmetic expression used to calculate the value.

Step by Step — In-Field Calculator

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Scroll to find cost item 13.3 Sandblast.
- 3. Click in the Forecast (T/O) Quantity field.

		Solp Wai	21,000,00	aquarencer
I 13	3	Paint Existing Steel Bridge Structure	1.00	Lump Sum
+ 13	3.1	Setup Equipment	1.00	Lump Sum
+ 13	3.2	Wash-Remove-Dispose of Water	25.000.00	Square Feet
+ 13	.3	Sandblast	<u>2500</u>	Square Feet
+ 13	3.4	Apply Primer	25,000.00	Square Feet
+ 13	3.5	Paint Top Coat	25,000.00	Square Feet

4. Press the = key, then type **10*250**.

	13	Paint Existing Steel Bridge Structure	1.00	Lump Sum
+	13.1	Setup Equipment	1.00	Lump Sum
+	13.2	Wash-Remove-Dispose of Water	25,000.00	Square Feet
+	13.3	Sandblast	=10*250	Square Feet
+	13.4	Apply Primer	25,000.00	Square Feet

 $5. \ \ {\rm Press\ the\ } {\rm Tab\ key\ and\ it\ calculates\ the\ result.}$

Lesson 14 Review

- 1. The Haul calculator allows you to:
 - a. Calculate the number of trucks required to complete the haul in a set amount of time
 - b. Calculate how long it will take to complete the haul with a set number of trucks
 - C. Neither
 - d. Both

2. The Trench Calculator allows you to quickly calculate ______ values.

- a. Trench
- b. Pipe
- C. Bedding
- d. All of the above
- 3. For the in-field calculator, what symbol needs to be at the beginning of the math equation for it to calculate?
 - a. +
 - b. –
 - C. =
 - d. (

Lesson 14 Summary

As a result of this lesson, you can:

- Use the Haul Calculator
- Use the Trench Calculator
- Use the In-Field Calculator