

# PROJECT COST MANAGEMENT



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# CONTENTS

Course Description Course Objectives How to Use this Manual Lessons Lesson Format Call-Outs	13 13
LESSON 8 – QUOTE MANAGEMENT	17
8.1 Quote Management Overview	
8.1.1 Quote Management Workflow	
8.1.2 Quotes and Quote Groups	
8.1.2.1 Resource Level Quote Groups	
8.1.2.2 CBS Level Quote Groups	
8.2 Requests for Quote	
8.2.1 Request for Quote (RFQ) Register Overview	
8.2.2 Request for Quote (RFQ) Record	
8.2.3 Create an RFQ	
8.2.3.1 Line Items	
8.2.3.2 Terms & Conditions	
8.2.3.3 Vendor Companies	
8.2.4 Attachments	
8.2.5 Setup	
8.2.6 Publish an RFQ	
Step by Step – Create and Publish an RFQ	28
8.2.7 RFQ Email Draft	
8.3 Quotes	34

8.3.1 Sample Received Quote Scope Sheet	35
8.3.2 Quote Register Overview	36
8.3.3 Quote Record Overview	37
8.3.4 Header Block	38
8.3.4.1 Quote records	38
8.3.5 Price Block	39
8.3.6 Quote Record Tabs	39
8.3.6.2 Resources & Cost Items	39
Cost item tags and user defined fields	40
8.3.7 Data Blocks	41
8.3.8 Data Block Tabs	44
8.3.8.3 Special Terms & Conditions	44
8.3.8.4 Qualifications	44
8.3.8.5 Packages	45
8.3.8.6 Taxes	46
8.3.8.7 Seller's Profile	46
8.3.8.8 Setup	47
8.3.8.9 Minority	
8.3.9 Create a Quote from RFQ	49
Step by Step – Create a Quote from RFQ	
8.3.10 Enter Quote Details	52
Step by Step – Enter Quote Details	52
Step by Step – Create a Multi-packages Quote	53
8.3.11 Use Unit Price or Extended Price on Quote Record Item	57
8.3.12 Duplicating an Existing Quote	
Step by Step – Duplicate an existing Quote	58
Exercise 8.1 – Quote Management	60
8.4 Quote Comparison & Award	62
8.4.1 Quote Comparison & Award Overview	62
8.4.2 Edit Mode	63
8.4.3 Substitute Values	63
	66
8.4.5 Export Quote Comparison and Award to Microsoft Excel	68
8.4.6 Additional Quote Comparison and Award functions	69
5	70
8.4.8 Adding Notes to Quote Comparison & Award	71
Step by Step – Add the Notes section to Quote Comparison & Award	
-	72
8.4.9 All Quote Groups Layout	74

8.4.10 Compare and Award Quotes	75
8.4.10.1 Open Status	77
8.4.10.2 Award Status	77
8.4.10.3 Review	. 78
Step by Step – Compare and Award Quotes	78
8.4.11 Package Entire Quote	81
8.4.12 Incomplete Quotes	82
8.5 Scope Items	. 83
8.5.1 Scope Item Setup	
8.5.2 Scope Item Creation and Award	87
Step by Step – Create and Award Scope Items	87
8.6 Quote Item Adjustment	. 97
Step by Step – Quote Item Adjustment	97
Lesson 8 Review	101
Lesson 8 Summary	101
LESSON 9 – REPORTING	103
9.1 Reports Menu	
9.1.1 Non-Modal Report dialog box	
9.1.2 Adjustable Reports	
Step by Step – Get to Know the Reports Menu	
9.1.3 Output Settings	
9.1.3.1 Report Printing Options	
Print Preview	
9.1.3.2 Apply custom Layouts and Headers/Footers to register reports	
9.1.3.3 Report Layout Settings	
9.1.3.4 Report Header/Footer Settings	
Cover Sheet fields and Job folder tags	
9.1.3.5 Report Detail Settings	
9.1.3.6 Save Output Settings	
Step by Step – Configure Report Output Settings (Report 1)	118
Step by Step – Configure Report Output Settings (Report 2)	123
9.1.4 Helpful Reports	. 128
9.1.4.7 PBS Summary	128
9.1.5 Standard Proposal	129
9.1.6 CBS Details	. 130
9.1.7 Audit	. 131
Exercise 9.1 – Run a System Report	. 132
9.2 Register Reports	134
Step by Step – Create a Register Report	. 135

9.2.1 Register Report Output Settings	
9.2.1.1 Page Setup	
9.2.1.2 Exporting to Document	
Exercise 9.2 – Create a Custom Register Report	
Lesson 9 Review	
Lesson 9 Summary	141
LESSON 10 – DATA REPRODUCTION	
10.1 Copy an Existing Job	145
Step by Step – Copy an Existing Job	145
10.2 Templates	
Step by Step – Create a Template	
10.2.1 Archive and Restore Templates	
Step by Step – Archive and Restore a Template	
10.3 Bid Wizard	
Step by Step – Use the Bid Wizard	
10.3.1 Bid Wizard Updates	
10.4 Copy Estimate Data Using Edit Commands	
Step by Step – Copy Estimate Data Using Edit Commands	
10.5 CBS Bid Wizard	
Step by Step – Use the CBS Bid Wizard	
10.6 Snapshots	
10.6.1 Snapshot Register	
Step by Step – Snapshot Register	
10.6.2 Creating a New Job Snapshot	
Step by Step – Create a New Job Snapshot	170
10.6.3 Editing a Job Snapshot	
Step by Step – Edit a Job Snapshot	
10.6.4 Deleting a Job Snapshot	174
Step by Step – Delete a Job Snapshot	
10.6.5 Loading a Job Snapshot	
Step by Step – Load a Job Snapshot	
Exercise 10.1 – Data Reproduction	
Lesson 10 Review	
Lesson 10 Summary	
LESSON 11 – EXCEL INTEGRATION	
11.1 Linking to Excel	
11.1.1 InEight Estimate Workbook	

11.1.2 Linking to and from Excel	
Step by Step – Link Estimate to Excel	186
11.1.3 Update Links	189
11.2 Built-In Spreadsheet	190
Step by Step – Built-In Spreadsheet	
11.3 Currency in Job Tracking Excel Import	
Lesson 11 Review	
Lesson 11 Summary	
LESSON 12 – SCHEDULE INTEGRATION	195
12.1 Primavera	197
12.1.1 Scheduling Options	
12.1.1.1 Job Properties Schedule Tab	
Step by Step – Login Options Tab	
12.1.1.2 Mapping Options Tab	
12.1.1.3 Resources Tab	
12.1.1.4 Overview - Resources Tab	201
12.1.1.5 Expense Costs Tab	201
12.1.2 Schedule Cost Items	202
Step by Step – Schedule a Cost Item in InEight Estimate	202
Step by Step – Schedule a Group of Cost Items in InEight Estimate	203
12.1.2.6 Roll Up Schedule	205
Step by Step – Roll Up Schedule	205
12.1.3 Update Primavera from InEight Estimate	205
Step by Step – Update Primavera from InEight Estimate	207
12.1.4 Update InEight Estimate from Primavera	
Step by Step – Update InEight Estimate from Primavera	
12.1.5 Manage Changes Between Estimate and Schedule	
12.1.5.7 Plug Days	
Step by Step – Schedule Plug Days	
12.1.5.8 Update Primavera with InEight Estimate Changes	
Step by Step – Update Primavera with InEight Estimate Changes	
Exercise 12.1 – Manage Changes Between Estimate and Primavera	
12.2 Microsoft Project	
12.2.1 Set Up Scheduling Options	
12.2.1.1 Job Properties Schedule Tab	
12.2.2 Schedule Cost Items	
Step by Step – Schedule a Cost Item in InEight Estimate	
Step by Step – Schedule a Group of Cost Items in InEight Estimate	
12.2.2.2 Roll Up Schedule	228

Step by Step – Roll Up Schedule	228
12.2.3 Update Microsoft Project from InEight Estimate	
Step by Step – Update MS Project from InEight Estimate	
12.2.4 Update InEight Estimate from Microsoft Project	
Step by Step – Update InEight Estimate from MS Project	
12.2.5 Export Copy of MS Project File	
12.2.6 Manage Changes Between Estimate and Schedule	
12.2.6.3 Plug Days	233
Step by Step – Schedule Plug Days	234
12.2.6.4 Update Microsoft Project with InEight Estimate Changes	234
Step by Step – Update MS Project with InEight Estimate Changes	
Lesson 12 Review	
Lesson 12 Summary	237
LESSON 13 – CASH FLOW	
13.1 Cash Flow	
13.2 Cash Flow Options	
13.2.0.1 Cash Flow Options Set Up	
Step by Step – Cash Flow Options Setup	
13.3 Cash Flow Display Settings	
13.3.1	
13.3.2 Cost Items and Cost Categories	
13.3.2.1 Cash Flow Display Set Up	
Step by Step – Cash Flow Display Settings Set Up	
13.3.3 Resource Utilization	
13.3.3.2 Resource Utilization Display Set Up	
Step by Step – Resource Utilization Display Setup	
Lesson 13 Review	
Lesson 13 Summary	254
LESSON 14 – INEIGHT ESTIMATE CALCULATORS	255
14.1 Haul Calculator	
Step by Step – Haul Calculator - Calculate Quantity of Trucks	
Step by Step – Haul Calculator - Calculate Total Duration	
14.2 Trench Calculator	
14.2.1 Trench Calculator - Trench Tab	
Step by Step – Trench Calculator - Trench	
14.2.2 Trench Calculator - Pipe Tab	
Step by Step – Trench Calculator - Pipe	
	······

14.2.3 Trench Calculator - Beddings Tab	
Step by Step – Trench Calculator - Beddings	
Exercise 14.1 – Trench Calculator	
14.3 In-Field Calculator	271
Step by Step – In-Field Calculator	
Lesson 14 Review	
Lesson 14 Summary	

# **STEP-BY-STEP PROCEDURES**

Step by Step – Create and Publish an RFQ	28
Step by Step – Create a Quote from RFQ	. 49
Step by Step – Enter Quote Details	. 52
Step by Step – Create a Multi-packages Quote	53
Step by Step – Duplicate an existing Quote	58
Step by Step – Add the Notes section to Quote Comparison & Award form	. 72
Step by Step – Compare and Award Quotes	. 78
Step by Step – Create and Award Scope Items	. 87
Step by Step – Quote Item Adjustment	. 97
Step by Step – Get to Know the Reports Menu	.105
Step by Step – Configure Report Output Settings (Report 1)	.118
Step by Step – Configure Report Output Settings (Report 2)	123
Step by Step – Create a Register Report	.135
Step by Step – Copy an Existing Job	145
Step by Step – Create a Template	.147
Step by Step – Archive and Restore a Template	151
Step by Step – Use the Bid Wizard	.152
Step by Step – Copy Estimate Data Using Edit Commands	.161
Step by Step – Use the CBS Bid Wizard	.165
Step by Step – Snapshot Register	.168
Step by Step – Create a New Job Snapshot	.170
Step by Step – Edit a Job Snapshot	173
Step by Step – Delete a Job Snapshot	.174
Step by Step – Load a Job Snapshot	175
Step by Step – Link Estimate to Excel	.186
Step by Step – Built-In Spreadsheet	190
Step by Step – Login Options Tab	. 198
Step by Step – Schedule a Cost Item in InEight Estimate	.202

Step by Step – Schedule a Group of Cost Items in InEight Estimate	
Step by Step – Roll Up Schedule	
Step by Step – Update Primavera from InEight Estimate	207
Step by Step – Update InEight Estimate from Primavera	214
Step by Step – Schedule Plug Days	217
Step by Step – Update Primavera with InEight Estimate Changes	218
Step by Step – Schedule a Cost Item in InEight Estimate	225
Step by Step – Schedule a Group of Cost Items in InEight Estimate	
Step by Step – Roll Up Schedule	
Step by Step – Update MS Project from InEight Estimate	229
Step by Step – Update InEight Estimate from MS Project	231
Step by Step – Schedule Plug Days	234
Step by Step – Update MS Project with InEight Estimate Changes	234
Step by Step – Cash Flow Options Setup	243
Step by Step – Cash Flow Display Settings Set Up	
Step by Step – Resource Utilization Display Setup	
Step by Step – Haul Calculator - Calculate Quantity of Trucks	
Step by Step – Haul Calculator - Calculate Total Duration	
Step by Step – Trench Calculator - Trench	
Step by Step – Trench Calculator - Pipe	
Step by Step – Trench Calculator - Beddings	
Step by Step – In-Field Calculator	

# **EXERCISES**

Exercise 8.1 – Quote Management	60
Exercise 9.1 – Run a System Report	
Exercise 9.2 – Create a Custom Register Report	
Exercise 10.1 – Data Reproduction	177
Exercise 12.1 – Manage Changes Between Estimate and Primavera	
Exercise 14.1 – Trench Calculator	



# **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**

8.1 Quote Management Overview	19
8.1.1 Quote Management Workflow	19
8.1.2 Quotes and Quote Groups	19
8.2 Requests for Quote	21
8.2.1 Request for Quote (RFQ) Register Overview	21
8.2.2 Request for Quote (RFQ) Record	22
8.2.3 Create an RFQ	23
8.2.4 Attachments	26
8.2.5 Setup	27
8.2.6 Publish an RFQ	28
8.2.7 RFQ Email Draft	33
8.3 Quotes	34
8.3.1 Sample Received Quote Scope Sheet	35
8.3.2 Quote Register Overview	36

8.3.3 Quote Record Overview	37
8.3.4 Header Block	38
8.3.5 Price Block	39
8.3.6 Quote Record Tabs	39
8.3.7 Data Blocks	41
8.3.8 Data Block Tabs	44
8.3.9 Create a Quote from RFQ	49
8.3.10 Enter Quote Details	52
8.3.11 Use Unit Price or Extended Price on Quote Record Item	57
8.3.12 Duplicating an Existing Quote	58
Exercise 8.1 – Quote Management	60
8.4 Quote Comparison & Award	62
8.4.1 Quote Comparison & Award Overview	62
8.4.2 Edit Mode	63
8.4.3 Substitute Values	63
8.4.4 Display Ignored Quotes	66
8.4.5 Export Quote Comparison and Award to Microsoft Excel	68
8.4.6 Additional Quote Comparison and Award functions	69
8.4.7 Configure Totals	70
8.4.8 Adding Notes to Quote Comparison & Award	71
8.4.9 All Quote Groups Layout	74
8.4.10 Compare and Award Quotes	75
8.4.11 Package Entire Quote	81
8.4.12 Incomplete Quotes	82
8.5 Scope Items	83
8.5.1 Scope Item Setup	86
8.5.2 Scope Item Creation and Award	87
8.6 Quote Item Adjustment	97
Lesson 8 Review	01
Lesson 8 Summary	01

# 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

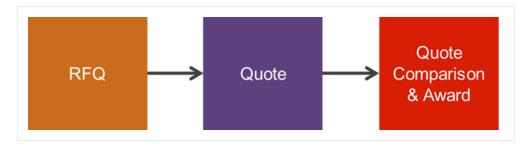
Awarding a quote in InEight Estimate does not mean the vendor is awarded the contract, but rather that their price is selected as the carrying cost in the bid.

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 Tow	ers	Process Equipm	nent Install	Standa	ard Installed Equipment F	Rate	Each	n i
+ 1	IEFC		Feeder Con	trols	Landscaping W	/ork	Standa	ard Installed Equipment F	Rate	Each	n
+ 1	IEHS		Heating Sys	tem	Process Equipm	nent Install	Standa	ard Installed Equipment F	Rate	Each	n
+ 1	IEPHP		Pump High P	ressure	Commercial Wo	ork	Standa	ard Installed Equipment F	Rate	Each	n
+ 1	IERMT		Raw Materia	al Tank	Concrete Mate	rials	Standa	ard Installed Equipment F	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.

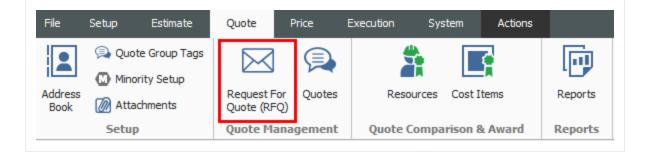
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Quote Group 🛛 🝸
<b>1</b> 3	Paint Existing Steel Bridge Structure	1.00	Lump Sum	Structural Painting
<b>14</b>	Process Equipment	1.00	Each	Process Equipment Install
<b>17</b>	Toll Booth	1.00	Each	Commercial Work
+ 18	Guardrail Type 2	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).

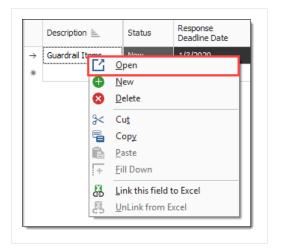


• The RFQ register lists all of the RFQs you've created, with a Description, a Status, and a Response Deadline Date

Co	st Breakdown Struc	ture (CBS)	Register	Resource Rate Reg	ster Re	equest for Quote	(RFQ) Register 🛛				
)ra	g columns here to grou	IP									
	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.

Des	cription						Status
Gu	ardrail Items						New     Published Date
	ponse Deadline Date:			e Deadline Tim			
_	columns here to group						Saved views: Standard View 🛩
	CBS Position Code =	RFQ ID	Quote Group -	Optional Code	Description	Quantity	
÷		6.1	Guardrail Work	1500 0100	Guardrail Typ	1,000.00	
	6.2	6.2	Guardrail Work	1500 0200	Guardrail Typ	200.00	

#### 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.

Line	Items	Terms & Con	ditions	Vendor Companies	Attachments	Setup		
Res	ources	Cost Items	1					
Drag		here to group						
_	CBS		RFQ ID	Quote Group Tag	Optional Code	Description	Quantity	Unit of Measure
-	CBS	here to group	RFQ ID	Quote Group Tag Guardrail Work	Couc		- /	Measure

#### 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.

Response Dea	adline Date: 7/29/20	009 <del>-</del> R	esponse Deadlin	e Time: 1	1:00 AM									
Line Items	Terms & Conditions	Vendor Companies	Attachments	Setup										
-Buyer's Specia	al Terms & Conditions													
Any penalites	assessed by the owne	r due to quality contro	l compliance devia	tions by th	e supplier wi	ill be deducte	d from the su	pplier's payme	nt.					$\wedge$
														$\sim$
RFO Instructio	ons													
Please contact	t site super John Smith	@ 623-555-6982 for o	delivery instruction	IS.										~
														~
L														
										ОК	Cancel	New	< Prev	Next >

#### 8.2.3.3 Vendor Companies

You will use the Vendor Companies tab to select the suppliers or subcontractors that will be receiving the RFQ. This is done by selecting them from the 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.

Lin	e Items	Terms & Conditions	Vendor Companies	Attachment	s Setup	
)ra	g columns l	here to group				
	Vendor	Contact	<u>i</u>	Status	Publish Item Quantities	Vendor Phone
÷	SUB18	SUB 18 Mel Bla	nk	New	$\checkmark$	111-222-3232
	SUB4	SUB4 Harry Be	elefony	New	$\checkmark$	111-222-1111
	Ven 18	Ven 18 CARRI	E Matty	New	$\checkmark$	111-333-3434
*						

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.

Line Items	Terms & Cor	nditions Vendo	r Companies	Attachments Se	etup				
rag columns	here to group							Saved views:	Previous View 👻
ing condition									
File Nan		Description	Location	File Type	File Size	Attached By	Date Attached		

#### 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.

Guardrail Ite	ems					
lesponse D	eadline Date: 7/2	9/2009 👻	R	esponse Deadlir	ne Time: 🛛	11:00 AM
line Items	Terms & Condition	ns Vendor Com	panies	Attachments	Setup	
	Tag 1:		•	Notes		
	Tag 2:		•			
	Tag 3:		•			
RFQ Publica	ation Settings					
Cost Item I	dentifier: CBS	Position Code	•			
✓ Include ✓ Include	RFQ Instructions Buyer's Special Ter Notes Attachments	ms & 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.	<ul> <li>Process Equipment Instail</li> <li>Process Materials</li> <li>Sign Work</li> <li>Structural Painting</li> <li>Aggregates</li> </ul>
✓ 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	Response Deadline Date: 12/27/2018 - Response							
Line Items	Terms & C	onditions	ompanies	Attack				
Resources	Cost Item	s						
Drag columns	here to grou	qı						
Code 🗄	Que Tag	ote Group	1	Description				
→ MBR	Agg	gregates		Aggregate B				
MDIRTE	B Agg	pregates		Dirt Class	В			

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:	7/29/20	009 👻	Re	esponse Deadlin	11:00 AM	
Line Items	Terms & Con	ditions	Vendor Comp	anies	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.

ine Items Terms & Conditions Vendor Companies Attachments Setup					
uyer's Spe	ial Terms & Conditions –				
Any penalites assessed by the owner due to quality control compliance deviations by the supplier will be deducted from the supplier's paymer					
ny penalite	s assessed by the owne	er due to quality control	compliance devia	tions by the	supplier will be deducted from the supplier's pay

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

Line	ne Items Terms & Conditions		Vendor C	Vendor Companies Attachments		ts Setup		
Drag	g columns	here to gr	oup					
	Vendor	Co	ntact		≞_	Status	Publish Item Quantiti	vendor Phone
	SUB18	SU	B 18 Mel Bl	ank		New	$\checkmark$	111-222-3232
	SUB4	SU	B4 Harry E	Belefony		New	$\checkmark$	111-222-1111
	Ven18	Ver	n 18 CARR	IE Matty		New	$\checkmark$	111-333-3434
ø					1			

- 13. Click on the **Address book** icon, and then select vendors.
- 14. Click OK.
- 15. Make sure **Publish to File** is checked for all vendors.
- 16. Select the sellers to whom you want to send the RFQ.

Company Name	First Name	Last Name
Example Vendor 1 Pat Roberts	s 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.

8	<b>-</b> -							_	
File	Setup	Estimate	Quote	Price	Execution	System	Actions		
E P	ublish								
œ	reate Quote								
P	rocess								
Cost	Cost Breakdown Structure (CBS) Register			Re	quest for Quot	e (RFQ) Reg	ister	Request for Quote (RFQ) Record	٥

• Select a location to save the RFQ.

> * 🛧 🗒 > Th	is PC > Documents			Search Do	cuments
Organize 🔻 New fold	er				· •
^	Name	Status	Date modified	Size	
A Quick access	My Projects		3/7/2023 4:52 PM		
Desktop 🖈	IISExpress		2/20/2023 9:58 AM		
🕂 Downloads 🖈	My Web Sites		2/20/2023 9:58 AM		
🖆 Documents  🖈	Snagit		12/20/2022 9:07 AM		
📰 Pictures 🛛 🖈	Visual Studio 2019		10/27/2022 11:26 AM		
🏰 OSDisk (C:) 🖈	Visual Studio 2022		10/27/2022 11:15 AM		
APIM	Custom Office Templates		7/8/2022 3:28 PM		
Estimate July 7	Camtasia		7/4/2022 5:46 PM		
File name: Exam	ple Vendor 1888 RFQ - Training Job - quot	e.doc			
Save as type: DOC	files (*.doc)				

• 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

				ΙΟΤΑΤΙΟΝ	
Job: Training Job	Training Job - Marico	pa County N	lo. TM2924		
TO:			FROM:		
Name: Pat Roberts Company: 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	
Mobile Phone:	Fax: 222-123-1234		Mobile Phone:	111-122-1111 222-112-2211	
Job Information	••	aining Job aining Job	Maricopa County No. TM2924		
Owner:		cample Owr			
Job Type:			General Engineering		
Job Location:		10 MP 100 t	o MP 120		
City:		aricopa			
City: County:					
City: County: State / Province:		Country: United States			
City: County: State / Province: Country:		Bid Location: Engineer's Of			
City: County: State / Province: Country: Bid Location:	Er		noc		
City: County: State / Province: Country: Bid Location: Bid Date:	Er 1/	8/2020			
City: County: State / Province: Country: Bid Location:	Er 1// 10		100		

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.

890	8 DR 4#3	RFQ from InEight C	ornoration - SKID	for Training Job - Infra	structure: Training	loh - Maricona C	ounty No. TM2024	Massage (HTML)	E C	- 0
and the second sec	1 1 1					1/61	ounty No. 1012524	incisage (initia)		
File Messag	e Insert (	Options Format	Text Review	Help & Tell	me what you wa	nt to do				
🗅 - 🍕	Times New Ro 🛩	12 <b>V B</b>	I U 🧸	· <u>A</u> · ⊟ ·	1≣ • ₫	<u>کا</u> <u>اق</u>	<u>8</u> <u>8</u> 0	~ 🖉~ 🕴 !	↓ № -	• ···
⊳ Send	To C C	harlie Bravo								
3	Subject RFQ fr	rom InEight Corporati	on - SKIP for	Training Job - Infrastructure	e: Training Job - M	aricopa County N	o. TM2924			
			R	QUEST FO	ORQUO	ΤΑΤΙΟ	N			
Job: Training Jol	b-1 Training Job - Ma	ricopa County No. TM2	924							
TO:			FROM:							
Name: Company:			Tom Cross Example Prime Contracto 400 First Street Suite 400 Hometown, AZ 889004							
Phone: Mobile Phone: Fax:	111-222-1111 222-221-2212		Phone: Mobile Phone: Fax:	111-122-1111 222-112-2211						
Email:	charlieb1234@e	xample.com	Email:							
Job Informat	ion:	Training Job-1 Training Job - Maric	opa County No. TM	2924						
Owner:		Example Owner								
Job Type:		Highway and Gener								
Job Location:		I-10 MP 100 to MP 1	120							
City: County:		Phoenix Maricopa								
State / Province:		Arizona								
Country:		United States								
Bid Location:		Engineer's Office								
Bid Date:		1/6/2020								
Bid Time:		5:00 AM								
Request for Q	uote (RFQ) In	formation:								
	8/21/2020 3:57 PM									
Response Deadli	ne Date: 7/29/200	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.

Receive	d	
Quote Scope	Sheet	
- DATE: 12/19/2019 PROJECT: TRAINING JOB TRAINING JOB - MARICOPA COUNTY NO. OCATION: PHOENIX, AZ	тм2924	
BITE CONCRETE: FORM, SUPPLY AND INSTALL		
<ol> <li>ONISTE IMPROVEMENTS         <ol> <li>Vertical Curb; Curb and Gutter; Valley Gutter</li> <li>4" thick broom finish walk with wire mesh; rar</li> <li>Flow-Through planer slab and walls</li> <li>8" thick crosswalk paving with rebar 36" x 36" colored aggregate finish (1 location only @ 1</li> </ol> </li> </ol>	np w/ domes ' pattern broom finish a	nd 18" x 36" pattern
	Price:	\$203,300
OFFSITE IMPROVEMENTS 1. Curb and Gutter 2. HC Ramps w/ domes; planter w/ rebar 3. 36" x 36" patterned finish walk w/ wire mesh		
<ul> <li>EXCLUSIONS:</li> <li>Layout of lines and grades</li> <li>Site grading</li> <li>Aggregate base and/or compaction; sand cushion</li> <li>Sealants, caulking and waterproofing; precast items</li> <li>Misc post footings and masonry wall footings</li> <li>Supply of embedded iron or metal</li> <li>Demolition</li> <li>Traffic control and pedestrian protection</li> </ul> UALIFICATIONS <ol> <li>Price valid for 60 days</li> <li>GC will provide a concrete pump washout area</li> <li>5% retention will be released 45 days after completio</li> </ol> Alternate Price to furnish and install 4" aggregate by others. Price based on rock being placed prior	base under parking	\$24,650 structure lab. Sand d grade beams. \$24,100
his proposal is good for thirty (30) days from the data herein, after ight to review the proposal for any changes in price. Please call me		
Rick Estimator		

# 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 🛛							
Dra	g columns here to group							
	Description 🚊	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. Dollar
	Aggregates	Aggregates	Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$0.00	\$0.00	U.S. Dollar
<u> </u>	Asphalt Materials		Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$1,115,97	\$1,102,50	U.S. Dollar
Δ	Asphalt Materials		Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$1,263,17	\$13,671.00	U.S. Dollar
	Electrical Work	Electrical Work	Accepted	Architectural Designs, Inc	Architectural Desig	\$4,200.00	\$0.00	U.S. Dollar
	Electrical Work	Electrical Work	Accepted	HD Engineering Group Rog	HD Engineering Gr	\$4,450.00	\$0.00	U.S. Dollar

# 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, Vendor's Profile, Setup, and Minority.

#### **Overview – Quote Record**

leader				1								Total	2	
Description	Pipe Materia	s		<u>.</u>					∧ Optional Code:			Extended Price:		\$0.0
									V Date:	7/20/2023	•	Item Taxes:		\$0.
Vendor	: 1128354 Alb	erta Ltd 0010 🔳	Vendor Name:	1128354 Alberta Ltd	Vendor P	hone: 7	80-920-3163		Source:		•	Quote Tax: Bond:		
Contac	t: <ad-hoc co<="" td=""><td>ntact&gt;</td><td>First Name:</td><td></td><td>Contact (</td><td>Office:</td><td></td><td></td><td>Currency:</td><td>U.S. Dollar</td><td>-</td><td>Item Conditions:</td><td></td><td>\$0.</td></ad-hoc>	ntact>	First Name:		Contact (	Office:			Currency:	U.S. Dollar	-	Item Conditions:		\$0.
Primary Emai	I:		Last Name:		Contact M	obile:			Status:	Incomplete		Special Conditions:		
External Ref	.:								Ignore:	Reason:		Total:		\$0.0
esources	Cost Items	3							Special Terms & Co	nditions				×
ag columns he	re to group				Saved views:	Stand	ard View	- ,O	Buyer's Special Term	is & Conditions	4			
Code 😐	RFQ ID	Quote Group 🖮	Optional Code	Description	No Split	Free	Awarded	Duration						< >
1	1		1	pay item 1	✓				Vendor's Special	Terms & Conditions				
2	2		2	pay item 2	$\checkmark$									$\hat{}$
	A								Special Conditions A	djustments:	\$0.00			
										-	y   Using Weighted Average awarded quotes in Comparab	-		
												Saved views:	Standard View	- ,O
										Scope Item		Included Amount	% of Total	
									Special Terms & Condit	ions Qualifications	Packages Taxes Vendo	or's Profile Setup Minorit	y	
								,			ОК	Cancel Ne		Next >

# 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.

#### 8.3.4.1 Quote records

The Quote record header block includes a vendor field with a searchable address book library register drop-down list. You can select shared vendor data to populate your quote header record with Platform's shared master data.

Header												
Description	A	sphalt Mate	It Materials									
Vendor:	1	128354 Albe	erta	Lt 🔳 V	endor Name:	1128354 Alberta Ltd	Vendor Phone	: 780-92	780-920-3163			
Contact	: A	lberta Fra	nk	Ma 💷	First Name:	Frank	Contact Office					
Primary Email	: Fr	ankmatty@	gm	ail.com	Last Name:	Matty	Contact Mobile	:				
							Book Register - Library					
				ctions	Iroup				× Enter text t	to search		~
		1		ctions ) columns here to g <b>Vendor ID</b>	jroup Vendor Nam	e <u>in</u>	Vendor Type	Fax ID	× Enter text	to search Address	1	~
				g columns here to g	Vendor Nam	e <u>is.</u>		Tax ID 461564451		Address		~ [
			Draç	columns here to g	Vendor Nam 1 Alliance Ge	eomatics LLC	Z001 ·		Tax Jurisdiction	Address	1 20th Ave NE	~ [
			Draç	yendor ID           +         0010087554           +         1 NP - Vendor           +         1 NP - Vendor	Vendor Nam           1 Alliance Ge           1_NP - Vend           1_Vendor 1	eomatics LLC	Z001 1_NP Vendor 1_NP Vendor	461564451	Tax Jurisdiction	Address 1261A 12	1 20th Ave NE	
			Draç	vendor ID           +         0010087554           +         1 NP - Vendor           +         1 NP - Vendor           +         1 NP - Vendor	Vendor Nam           1 Alliance Ge           12           1_NP - Vendor 1           1_Vendor 1           1_Vendor 1	ecomatics LLC	Z001	461564451 12345	Tax Jurisdiction 4803300400 abc	Address 1261A 12 90th Stre	1 20th Ave NE eet	~ [
			Draç	yendor ID           +         0010087554           +         1 NP - Vendor           +         1 NP - Vendor	Vendor Nam           1 Aliance Ge           1_NP - Vendor 1           1_Vendor 1           1_Vendor 1           10X Engineer	eomatics LLC	Z001         -           1_NP Vendor         -           1_NP Vendor         -           1_NP Vendor         -           2001         -	461564451	Tax Jurisdiction	Address 1261A 12 90th Stree 1162 Mar	1 20th Ave NE	

Using Platform's shared data also reinforces accurate Estimate quote reporting. For example, you can report on which vendors and contacts have been awarded quotes or run a report on how many RFQs have been sent to select vendors and how many RFQs were returned for certain jobs. Additionally, using Platform shared vendors makes it possible to report on all activity related to a particular vendor. Examples include seeing how many subcontract agreements have been executed in InEight Contract, or how many claims/issues a vendor has been involved with in InEight Change. The predominant value for Estimate using Platform vendors, along with other InEight applications, ensures that the same vendors are being used by all applications.

#### 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

#### 8.3.6.2 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	to group							Find:	[Search Fo	n] m	Saved views: Pre	vious 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	\$0.0
P1	3.2	3.2		3.1	Excavation, trucks	~			1	50,000.00	Cubic Yard	P1	P1 \$200,000.0
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.

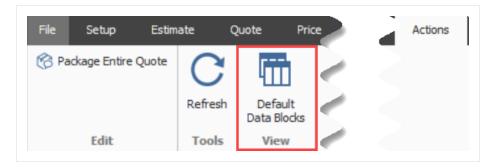
Quote Record 0	•																				
Header																		Total			
Descriptio	r: Guard Ra	il Items									0	ptional Cod	e:					Extended Pri	ice:		\$30,200
Conta	t: Example :	Sub #2 M	lel Blank		Phor	e: 1	11-222-323	2				Dat	e:					Item Taxes:			\$0.
Company Nam	e: Example :	Sub #2			Mobi	le:						Source					•	Quote Tax: Bond:			
First Nam	e: Mel				Fi	BC 23	22-222-111					Currenc	(: U.S.I	Dollar			•	Item Conditi	ions:		\$0.
Last Nam	e: Blank				Ema	il:						Statu	s: Recei	ved				Special Cond			
External Re						_						Ignor	e: 🗌 R	eason:				Total:			\$30,200.
Resources Cost	Items																				
Drag columns here to	group																	Sav	ed views: Sta	ndard View	-
Code 🚋	RFQ ID	Tag 11	Tag 12	Tag 13	Tag Tag 14 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 Cor	we											11 inch copp	plastic casing			
6.2		_		1			-				1	_		-		-					1
*																					

# 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
- Vendor's Profile
- Setup
- Minority



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

	er's Special Terr	ns & Condition	IS						
									0
<u>v</u>	/endor's Special	Terms & Cond	itions						Ť
									0
Spe	cial Conditions A	diustments:		\$0.00					×
	ribute Special Co			Ising Weighted /	_				
~1	nclude Special Co	onditions cost	storunawarded	a quotes in Com	parable	lotais			
Dra	g columns here to	group				Sa	ved views: Sta	andard View	2 -
					_		Amount	% of Total	Notes
	Row Number 🖮	Scope Item	I	Quote Group	<u> </u>	Included	Amount	76 01 10tdi	110125
		Scope Item	1	Quote Group	2	Included	Amount	78 01 10(2)	Hotes
		Scope Item		Quote Group	-	Included			indes
1		Scope Item	1	Quote Group	<u>-</u>	Included	4mount \$0.0		hotes

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 news & Conditions
Seller's Special Terms & Conditions

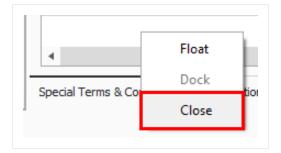
Drop the data block on top of an arrow where you wish to land the data block.

Qualifications		×
Bond		^
○ Vendor can provide a BOND for all work quoted         Bonding Company:         Bonding Agent:         Bonding Phone:         ○ Add Bond Cost to the Quote         Cost of BOND to be added to quoted price :         Rate/\$1,000:         ▶ \$0.00         Bond Cost:	Special Terms & Conditi × Buyer's Special Terms & Conditions	
Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent:	Vendor's Special Terms & Condir	
Qualifications Packages Taxes Vendor's Profile	Setup Minority OK Cancel New < Prev	Next >

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

Description:	Pipe Materials								~	Optional Code:		
									~	Date:	7/20/2023	
Vendor:	1128354 Alberta Ltd 0010	Vendor Name:	1128354 Alberta Ltd		Vendor Phone:	780-92	0-3163	}		Source:		
Contact:	<ad-hoc contact=""></ad-hoc>	First Name:			Contact Office:					Currency:	U.S. Dollar	
Primary Email:		Last Name:			Contact Mobile:					Status:	Incomplete	
External Ref.:										Ignore:	Reason:	
Special Terms &	Conditions					×	Re	source	Quali	fications		
uyer's Special Ten	ms & Conditions					^	F	✓ to c	Bond			
									🗌 Ve	ndor can provide	e a BOND for all wor	k quote
	17					-		Code 🚊 🛛 RF	Bondi	ng Company:		
g vendors Specia	l Terms & Conditions					-		1 1	Во	nding Agent:		]
								2 2	Bo	nding Phone:		]
pecial Conditions	Adjustments:	\$0.00					<b>→</b>	A	Ad	d Bond Cost to f	the Quote	
istribute Special C	Conditions: O Evenly O Us	ing Weighted Average	2						Cost	of BOND to be a	dded to quoted pric	e:
Include Special C	Conditions costs for unawarded	quotes in Comparable	Totals							Rate/\$1,000:	► \$0.00	-
)rag columns here t	to group		Saved views	: Standard	d View	•				Bond Cost:	\$0.00	(
Row	Scope Item	Quote Group 🚊	Included Am	ount	% of Total	Nc			Insura			
Number	Scope real	Quote oroup ≥	All	ount	70 01 10 tal				Ve	ndor is INSURED	) as required by app	licable
										Insurance Com	pany:	
										Insurance A	aent:	

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

### 8.3.8.3 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.

Buyer's	s Special Term	is & Conditions					
							^
∠ Ven	idor's Special	Terms & Conditions					~
							0
Snecial	l Conditions A	diustments:	\$0.00				*
		-		_			
	oute Special Co	0	Using Weighted Averag				
✓ Inclu	lude Special Co	onditions costs for unawa	rded quotes in Comparabl	e Totals			
D	alumna hara ta			_			C
Drag co	olumns here to	group		Sa	ved views: S	tandard View	<u>ر - ا</u>
	low Number ≡	Scope Item	Quote Group 🚊	Included	Amount	tandard View % of Total	Notes
			Quote Group 🚊				······································
			Quote Group 🛓		Amount	% of Total	······································
			Quote Group 🚊		Amount		······································
			Quote Group 🚊		Amount	% of Total	······································
R N		Scope Item			Amount \$0	% of Total	······································

#### 8.3.8.4 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	/
Vendor can provide a BOND for all work quoted	
Bonding Company:	
Bonding Agent: American	
Bonding Phone:	
Add Bond Cost to the Quote	
Cost of BOND to be added to quoted price :	
Rate/\$1,000: \$0.00	
Bond Cost: \$330.00	
Vendor is INSURED as required by applicable law Insurance Company:	
Insurance Agent: American	
Insurance Phone:	
License Vendor is LICENSED to perform all work quoted	
Licensor:	
Class:	
ID: EZ-Licinse-A1	

#### 8.3.8.5 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	e 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	U.S. Dollar	0.00		P2	Off Site	\$30,000.00		
	P1	4.1		P1	P1	U.S. Dollar	0.00	$\rightarrow$					
	P1	4.2		P1	P1	U.S. Dollar	0.00						
	P1	4.3		P1	P1	U.S. Dollar	0.00						
1	P2	5.1		P2	P2 \$30,000.00	U.S. Dollar	0.00						
,	P2 -	5.2		P2	P2	U.S. Dollar	0.00						
	P2	20		P2	P2	U.S. Dollar	0.00						
ŧ									:	2			

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

#### 8.3.8.6 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 P	rice			
Quote Tax Add Taxes to t	he Quote				
Taxes to be adde	to Awarded Tot	al as a Percentag	e of Total:		
Tax Rate:	0.00				
Total Tax:	\$450.00				

#### 8.3.8.7 Seller's Profile

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

Address Book No	es				
Examplesave	or training	as needed.			
Alternate Contac	t Informati	on			
Email:					
_ Filone.					

#### 8.3.8.8 Setup

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

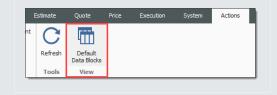
Setup				×
Current Status				
RFQ Status:				
Last Update: 5/5/2020 7:	:05:03 PM			
Quote Origin: WMFarr				
Tags				
Tag 1: Pipe	Ŧ			
Tag 2:	-			
Tag 3:	-			
Notes				
				(
				~

### 8.3.8.9 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	,
	Business Enterprise
Vendo	or qualifies as the following type of MINORITY BUSINESSENTERPRISE on this job
DBE	DBE Certification:
O MBE	MBE Certification:
<b>WBE</b>	WBE Certification:
OBE1	OBE1 Certification:
OBE2	OBE2 Certification:
OBE3	OBE3 Certification:
OBE4	OBE4 Certification:
OBE5	OBE5 Certification:
OBE6	OBE6 Certification:
OBE7	OBE7 Certification:
Special Te	erms & Conditions Qualifications Packages Taxes Vendor's Profile Setup Minority

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.

TIP

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).

Co	st Breakdown Str	ucture (CBS)	Register	Rec	quest for Quote (	RFQ) Register	0
Dra	g columns here to gr	oup					
	Description 🖮	Status	Response Deadline Date		Response Deadline Time	Published Date	RFQ Instr
→	Aggregates	Published	1/31/2020		2:00 PM	11/14/2019	
÷	Guardrail Items	New	1/3/2020		11:00 AM		
<b>*</b>							

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

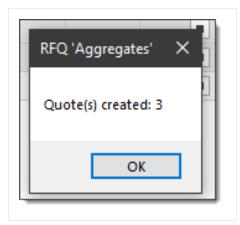
Lin	e Items	Terms & Conditions	Ver	ndor Companies	Attachments	Setup
Drag	g columns	here to group				
	Vendor			Contact	<u> </u>	Sta
	1128354	4 Alberta Ltd 0010106	779	Alberta Ltd To		Ne
÷						1

6. From the Actions menu, select Create Quote.

• InEight Estimate will create quotes for each of the sellers you selected

File Setup
E Publish
🖃 Publish All
🕀 Create Quote
Process

• 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 🚊	RFQ Description	Quote Status	Vendor
÷	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**).

Cos	st Breakdown St	ructure (CBS) F	legister	Quote Register	0	Quot	e Record
Drag	g columns here to g	group					
	Description	≞ ▼	RFQ Description		Quot Statu		Seller
$\rightarrow$	Pipe Materials	_			Rece	ived	Example Vend
2	Pipe Materials				Rece	ived	Example Vend
	Pipe Materials				Rece	ived	Example Vend
ß	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 Register	Quote Record	0
Header				
Description:	Pipe Materials for site improve	ements.		
Contact:	Example Vendor 1 Pat Rober	rts		<b>e</b> 🗉
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						
Drag columns here to group									
	Code 🛓		Quote	Group ៉	Descripti	on			
4	MPP10		Pipe Ma	aterials	Pipe 10"	PVC SDR21			
	MPP24		24 Pipe Materials		Pipe 24" PVC SDR3				
	MPR36		Pipe Ma	aterials	Pipe RCP	36 In			
*									

- 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		
Dra	g columns here	e to group	
	Code 📃	Description	Amount
	P1	On Site	\$200,000.00
÷	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.

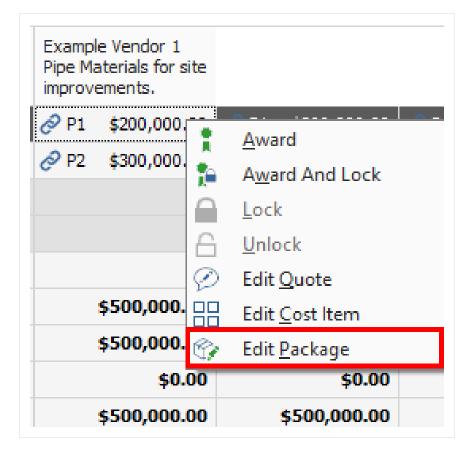
Re	sources Cost	Items						Pa	ckages		
Drag	g columns here to	groEjmd: [Sea	arch For]	··· Saved view	vs: Previous	view +		Dra	g columns here t	o group	
	Package	Code	RFQ ID	Quote Group	Optional Code	Description	No		Code 🛓	Description	Amount
	P1	7		Pipe Materials	800 0220	10 Inch PVC Force Main			P1	OnSite	\$200,000.00
0	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 aterials	WBE	e Vendor 6	Example Vendor 1 Pipe Materials for site			
				Pipe Ma	aterials	improvi	nents		
t.	\$22.51	🔗 P1	\$290,000.00	🔗 P1	\$300,000.00		\$200,000.00		
1	\$52.84	🔗 P2	\$126,000.00	🔗 P2	\$125,000.00	🖉 P2	\$300,000.00		
¢ A	28 604		¢416 000 00		¢435.000.00		¢500.000.00		
24	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
<b>\$</b> 4	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
<b>\$4</b>	28,694		\$0.00		\$0.00		\$0.00		
<b>\$4</b>	28,694		\$416,000.00		\$425,000.00		\$500,000.00		
	\$0.00		\$0.00		\$0.00		\$0.00		
		11/13	3/2019 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.

laore	Record O														
leader	r														
	Description:	AsphaltMaterial										Opti	onal Code:		
	Contact:	Example Vendor	2 Stan Mark			0 1	Phone: 111-	133-2123					Date:		
Co	ompany Name:	Example Vendor	2				Mobile:						Source:		
	First Name:	Stan					Fax: 222-	123-2134					Currency:	U.S. Dollar	
	Last Name:	Mark					Email:						Status:	Received	
	External Ref.:											_	Innores	Reason:	
Resour	rces Cost It	ems												Special Terms & Conditions	
rag col	olumns here to g	roup								Save	d views: Previous V	iew	- P	Buyer's Special Terms & Conditions	
Co	ode 🚊 🛛 🕻	uote Group 🖮	Description	No Split	Free	Awarded	Duration	Quantity	Unit of Measure	Unit Price	Extended Price	Currency	Default Tax Rate		
S MA	AAM A	sphalt Materials	Asphalt Mix (Finish)	~				1 35,000.00	Ton	\$34.00	\$1,190,000.00	U.S. Dollar		Seller's Special Terms & Condition	s
S MA	AFA A	sphalt Materials	Fine Aggregate	✓				1 1,860.00	Ton	\$7.00	\$13,020.00	U.S. Dollar			
•										L				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.

Co	st Breakdown Struct	ure (CBS) Register	Quote Register	Quote Com	nparison & Award - I	Resources ©						
Dra	g columns here to group								Find: [Search For]	··· Saved views	s: Standard View	
	Resource 😐	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug		Example Vendor 1 Asphalt Materials	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	🛊 🔗 🔺 \$31.5	0 🔗 \$35.70	\$34.13	\$34.13	
	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	\$7.2	5 🔗 \$7.35	\$8.19	\$8.19	5
÷	MPP 10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.2	\$\$3.28	812.60	\$13.65	1
	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.4	\$ \$20.48	8 \$25.20	🔋 🔗 🛛 \$22.05	
	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.1.	3 \$34.13	8 \$31.50	1 832.55	
		Scope Items										
		Summary										
		Minority Type									🙆 DBI	
		Quoted Total				\$1,406,973.75	\$0.00	\$1,171,100.7	\$1,325,646.00	\$266,616.00	\$271,471.20	
		Comparable Total	<			\$1,406,973.75	\$1,406,973.75	\$1,308,747.3	\$1,463,292.60	\$1,535,943.15	\$1,540,798.35	

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

÷	Print	🖓 By Quote Group	😪 Set /	All to Reviewed	2	🕢 🖗 Du	plicate Quote 🛛 😚 Pa	ckage Entire Quote	Award	🔒 Lock 🛛 🔄 🎤	Quoted Items	, TEX (	ero Items
q	Preview	🛸 All Quote Groups	Set /	All to Not Reviewed			ore Quote 🛛 🙆 Ed	it Package	Award And Lock	G Unlock	🚮 Unit Price	[2] s	cope Items
2	Export to Excel	🗐 All Quote Items			Edit Resource	Edit Quote				Edit Prices	Substitute Value	s 💬 I	gnored Quot
	Print	Layout	Quoto	e Group Status	Resources			Quites				v	iew
Cos	st Breakdown S	tructure (CBS) Regis	ter	Quote Register	Quote Con	nparison & Award - I	Resources ©						
Jrag	g columns here to	group											
	Resource E	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 DBE Pipe Ma	e Vendor 4 Iterials
÷	маам	Asphalt Mix (Fi	nish)	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		\$8.1
	MPP10	Pipe 10" PVC S	0R21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	812.60	:0	\$13.6
	MPP24	Pipe 24" PVC S	DR.35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	& \$25.20	10	\$22.0
	MPR36	Pipe RCP 36 In		1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	831.50	10	\$32.5
		Scope Items											
		Summary											
		Minority Typ	e									•	DE
		Quoted Tota	1				\$1,406,973.75	\$0.00	\$1,171,100.70	\$1,325,646.00	\$266,616.00		\$271,471.2
		Comparable	Total	<			\$1,406,973,75	\$1,406,973,75	\$1,308,747,30	\$1,463,292,60	\$1.535,943.15	5	1.540.798.3

- 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.

	n Structure (	BS) Register	Quote Regist	er Quo	te Comparison & Award - Re	sources	Quote Record O			
Header									Total	
Descrip	tion: Asphalt	faterials(Copy)					Optional Code:		Extended Price:	\$1,062,834.0
Co	ntact: <ad-hor< td=""><td>Address&gt;</td><td>۵ 🗈</td><td>Phone:</td><td></td><td></td><td>Date:</td><td>-</td><td>Item Taxes:</td><td>\$53,141.7</td></ad-hor<>	Address>	۵ 🗈	Phone:			Date:	-	Item Taxes:	\$53,141.7
Company I	lame:			Mobile:			Source:	•	Quote Tax: Bond:	
First I	lame:			Fax:			Currency: U.S. Dollar	•	Item Conditions:	\$0.
Last I	lame:			Email:			Status: Received		Special Conditions:	
Externa	Paf ·						Ignore: Reason:	Ţ	Total:	
	_						Ignore: Coulon:		lotal:	\$1,115,975.
Resources	lost Items						Minority			×
rag columns he	e to group	Find: Search	For]	Saved views:	Previous View	-	Minority Business Enterprise			
	050 10		Optional				Seller qualifies as the following type of MINORITY BUS	SINESS ENTERPRISE 0	this job:	
Code 🛓	RFQ ID	Quote Group 🖮	Code	Description	No Split	Free	DBE DBE Certification:			
>							MBE MBE Certification:			
							WBE WBE Certification:			
							OBE1 OBE1 Certification:			
							OBE2 OBE2 Certification:			
							OBE3 OBE3 Certification:			
							OBE4 OBE4 Certification:			
							OBES OBES Certification:			
							OBE6 OBE6 Certification:			
						•	Special Terms & Conditions Qualifications Packages 1	Taxes Seller's Profile	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.
<b>Quote</b> 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	<ul> <li>Your quotes display with the vendor name plus the quote description.</li> <li>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</li> </ul>
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 C Minority Setup Attachments Setup		Jotes nent	Resources Quote Compa	Cost Items	Reports Reports										
uote C	omparison & Award - C	ost items	Quote	Register												-
Quote (	iroup(s) 2	×	Dra	g columns here to gr	oup							4				3 Find:
	Description 🛓 Electrical Work	Reviewed		CBS Position Code	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example Guard R	e Sub #2 Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitework
$\checkmark$	Guardrail Work			18	Guardrail Type	2	1,000.00	Linear Feet	\$24.00		\$25,000.00	\$50,000.00	10	\$24,000.00	\$25,000.00	8 \$50,000
	Sign Work			19	Guardrail Type	3A	200.00	Linear Feet	\$31.00	<b>\$6,200.00</b>	\$7,000.00	\$7,000.00	:0	\$6,200.00	\$5,000.00	\$7,00
			1		Scope Items											
			→		Summary											
					Minority Type											
					Quoted Total						\$32,000.00	\$0.00		\$30,200.00	\$31,000.00	\$50,000
											\$32,000.00	\$57,000.00		\$30,200.00	\$31,000.00	\$57,000

### 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.

inore are	up(s)	× D	ag columns here to grou	Þ					-		Find:	Search For] …	Saved views: Sta	ndard View -
	Description 😑	Re	CBS Position Code	Description	Forecast (T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detai	C&H Concrete Construction, Inc.	Knopp Construction	Morin Concrete Contractors	Case Construction Concrete Formwork
	Concrete, Precast	-		-	Quantity						Concrete Placement		Concrete Placement	
	Concrete, Sitework	1	3.4.1	formwork	1.00	Lump Sum	\$2,317,240.00		\$3,281,200.00	\$2,525,200.00		-	\$2,525,200.00	🕴 🔗 🛛 <b>\$2,317,240.0</b> 0
~	Concrete, Structural		3.4.2	place and finish	1.00	Lump Sum	\$285,000.00	\$285,000.00	\$375,500.00	\$285,000.00	1 285,000.00	\$295,000.00	\$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													
	Rebar Install													
	Scaffolding													
	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	<b>Ų</b>	\$15,000.00	1	\$15,000.00		
27.1	Electrical Work	1.00	Each	\$5,000.00	<b></b>	\$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.

	Ouplicate Quote	🛞 Package Entire Quote	🗍 Award	Cock		Quoted Items	📨 Zero Items	🗗 Configure Totals
2 Dig	gnore Quote	💮 Edit Package	🚔 Award And Lock	🔒 Unlock	CO1	C2 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, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	\$50,000.0
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	2	\$6,200.00		\$7,000.00	\$7,000.00
20	Type 4 Signs	1,000.00	Square F	\$15.00	<b></b>	\$15,000.00	1	\$15,000.00	\$13,000.00
27.1	Electrical Work	1.00	Each	\$5,000.00	<b></b>	\$5,000.00	1	\$5,000.00	\$3,500.00

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.

Edit Prices	Quoted Items	📨 Zero Items	📌 Configure Totals
	<sup>C2</sup> <sub>200</sub> Unit Price	Scope Items	🚠 Set Substitute Ranking
	Substitute Values	💬 Ignored Quotes	m 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	x x
Lo	varded Splittable Quote west Splittable Quote tail	
Plu		
	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.

#### 8.4 Quote Comparison & Award

Print	💫 Quote Groups	🖗 Set Al	to Reviewed			lit Quote	Cock	👰 Quo	ted Items	Scope	e Items	🔓 Set Subs	titute Ranking		Session	Recap			
C Preview	🗐 All Items	😡 Set Al	to Not Revie	vea		vard	🔒 Unlock	C2 Unit	Price	💬 Ignor	ed Quotes				Auto Av	ard +			
Export to Excel				E	dit 👔 A	vard And Lock	💮 Edit Pac	kage 👫 Subs	titute Values	s 📌 Confi	gure Totals			efault a Blocks					
Print	Layout	Quote	Group Statu	s Cost	Items	Quo	tes				View	w			Tools				
Cost Breakdown	Structure (CBS) Reg	ister	Request f	r Quote (RF	Q) Register	Request f	or Quote (Rf	Q) Record	Quote R	egister	Quote	Comparison 8	k Award - Cost ite	ms O					
Quote Group(s)		×	Drag colur	ins here to gro	pup														Find:
	scription 🖮 Revie	ewed	CBS Posit	on Code	Description		<u>1</u>	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail		e Sub #2 Rail Items	Example Guard Ra		HD Engineering Group Concrete, Sitework
Elec	ctrical work 2		18		Guardrail Typ	2		1,000.00	Linear	\$24.00	2	\$24,000.00	\$25.00	\$25.00	10	\$24.00	Ø	\$25.00	\$50.00
Elec	ctrical work 3		19		Guardrail Typ	2 3A		200.00	Linear	\$31.00	2	\$6,200.00	\$35.00	\$35.00	10	\$31.00	Ø	\$30.00	
V Gua	ardrail Work		17		Toll Booth			1.00	Each	\$40,00	2	\$40,000.00	\$25,000.00	\$25,264.5	5	\$25,264.55	10	\$40,000.00	
Pipe	e Materials				Scope Items														
Sign	n Work				Summary														
					Minority Type														
					Quoted Total								\$57,000.00	\$25,264.5	5	\$30,200.00		\$71,000.00	\$50,000.00
					Comparable T	otal	<	1					\$57,000.00	\$57,264.5	;	\$55,464.55		\$71,000.00	\$82,264.5
					Awarded Tota	l .							\$0.00	\$0.00	)	\$30,200.00		\$40,000.00	\$0.00
					Quoted Items	Total							\$57,000.00	\$25,264.5	5	\$30,200.00		\$71,000.00	\$50,000.00
					Special Condit	ions							\$0.00	\$0.00	)	\$0.00		\$0.00	\$0.00
			→		Last Update										7/29/	2009 2:21:	11/13	/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 Example V Pipe Materials for site DBE improvements Pipe Mate	
\$1,311,975.0 \$13,671.0	Award And Lock	
	Lock	1,990.00 6,150.00
	<ul> <li>Edit <u>Q</u>uote</li> <li>Duplicate Quote</li> </ul>	3,331.20
D	<ul> <li>Ignore Quote</li> <li>Package Entire Quote</li> </ul>	DBE
\$1,325,646.0	📛 🖕 Edit Resource	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 columns here to g		<sub>c</sub> 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	∑ <sup>2</sup> 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	<b>\$24,000</b>	\$25,000.00	\$25,000.00		\$25,000.00	10	\$24,000.00		\$25,000.00	c? \$25	,000.00
Linear Feet	\$31.00	<b>\$6,200.00</b>	\$7,000.00	\$7,000.00		\$7,000.00	10	\$6,200.00		\$7,000.00	ଚି \$6	,000.00
Square F	\$13.00	<b>\$13,000</b>	\$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 Export Quote Comparison and Award to Microsoft Excel

The Microsoft Excel file generated when you export the Quote Comparison & Award form closely resembles the form in Estimate, so users of this output can more clearly understand what the estimators knew when they made determinations on which numbers to carry.

File	Home Inse	rt Page Layout	Formulas Di	ata Review	v View Auton	nate Help	Developer			🖓 Comr	ments 🖻	Shar	ire
aste	∑ Cut ☐ Copy ~ Ø Format Painter Ipboard I	Calibri ~ B I U ~ E ~	11 - A A	E E E	🖭 🖭 🔛 Merge		\$ ~ % 9 5 20 Conditional For Formatting ~ Tal	ble * Styles *	Insert Delete Format	Sort & Find & Analyze r Filter Select Data	Sensitivity Sensitivity		
L		√ £ CBS											
	E	F	G	н	1		1		к	I . I I	м	N	
	Total	Cost			1_Vendor1		Cooper Outdoor Advertising Inc		WonderBoyB	WonderBoyB			
Unit	S24.00				Guard Rail Items			T 010 10	Guard Rail Items \$562,344,000.00	Guard Rail Items			
	\$31.00			\$25,000.00	0	\$24,000.00	2 P1		\$562,344,000.00 \$145,272,200.00				
			\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00		\$30,200.00 \$0.00 \$0.00		\$31,000.00 \$0.00 \$0.00	\$707,616,200.00 \$0.00 \$0.00	0 <b>\$0.00</b>			
			\$0.00	\$0.00		\$0.00		\$0.00	\$0.00				
			\$0.00	\$0.00		\$0.00		\$0.00	\$0.00				
			\$32,000.00	\$0.00		\$30,200.00		\$31,000.00	\$707,616,200.00	\$707,616,200.00			
			\$0.00	\$0.00		\$0.00		\$0.00	\$0.00				
			\$32,000.00	\$0.00		\$30,200.00		\$31,000.00	\$707,616,200.00				
			\$0.00	\$32,000.00		\$0.00		\$0.00	\$0.00				
			\$32,000.00	\$32,000.00		\$30,200.00		\$31,000.00 \$0.00	\$707,616,200.00				
			\$0.00		5/11/2023 2:38:01 A		7/24/2023 11:24:01 PM			6/2/2023 12:37:37 AM			
					,				VI 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	al el cores restrati com			

The Quote Comparison & Award form changes frequently in the closing hours of a bid, which can prompt estimators to keep track of what the subcontractor and supplier quotes might have looked like at any point throughout the bid closing. Some estimators rely on such bid leveling information but do not want to access live information directly in the application, making it crucial to produce an identical output file of the Quote Compare & Award form at any given time.

To create the Quote Comparison & Award Excel file, click on the **Export to Excel** icon. Enter a file name for the Excel file, and then click **Save**.

File Setup	Estimate Quote	Price	System Inte	grations	Actions				
📑 Print	😡 By Quote Group		≝. ⊘	PD Du	plicate Quote		All Items	C2 Unit Price	📝 Scope Ite
neview	🛸 All Quote Groups	9			nore Quote	<b>(G)</b>	🔗 Quoted Items	Substitute	Values 💬 Ignored
Export to Excel	All Quote Items	Edit	Resource Edit Quo	te		Edit Prices	😕 Unquoted Items	📨 Zero Items	s 📌 Configure
Print	Layout	Res	sources					View	
Quote Companion	a & Award - Resource	s ©							
Quote Group(s)	Export spr	eadsheet to						×	Saved views: Standa
Descr Test	ription $\leftarrow$ $\rightarrow$ $\vee$	↑ 🕹 > 1	This PC > Downloa	ds		ū	Search Download	5	
Asph	alt Mate Organize 👻	New fol	lder				8==	• 🕜	
Pipe	Material	sk (C:) 🔺 ^	Name			Ty	be	Size ^	
	Git Pr	ojects 🖈	✓ Yesterday (	2)					
	📙 Som	pliance1	InEight Co		nns List xlsx	Mi	crosoft Excel Work	47	
	Cont	rol	improved.				crosoft Excel Work	16	
	Estim	ate	✓ Last week (	1) ——					
	Schee	dule	Contacts_	914202305	1609.xlsx	Mi	crosoft Excel Work	10	
	🕹 Dowr	nloads	ncuntiti i	<b>^ ^</b>	. 1	<b>F</b> 31		×	
	File	e name: Qu	ote Comparison and	Award 09	212023.xlsx			~	
	Save	as type: Exce	el files (*.xlsx)					~	
	∧ Hide Fold	ers				[	Save	Cancel	

# 8.4.6 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	<ul> <li>Quote Item Tool tip displays details including:</li> <li>Unit Price</li> <li>Extended Price</li> <li>Bond</li> <li>Taxes</li> <li>Special Conditions</li> <li>an indicator for a delta quote item</li> </ul>

i.	Description	Forecast	Unit of	Unit Cost	Total Cost	Plug	Detail	C&H Concrete Construction, Inc.	Knopp Construction	Morin Concrete Contractors	* Case Construction	1
-	Description	(T/O) Quantity	Measure	CHI CON	(Forecast)	mag	Dean	Concrete Placement	Concrete Formwork	Concrete Placement	Concrete Formwork	
	formwork	1.00	Lump Sum	\$2,339,113	\$2,339,113.70	\$3,281,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00	2 8 \$2,339,113.70	
	place and finish	1.00	Lump Sum	\$0.00	\$0.00	\$375,500.00	\$0.00	\$285,000.00	\$385,000.00	\$294,000.00	\$553,508.49	<u> </u>
	Scope Items											2,317,240.00 ce: \$2,317,240.00
	Summary						2				Quote Tax: Bond: \$2,33	\$18,537.92
	Minority Type						•				Special Cond	itions: \$1,000.00
	Notes								D	D	0	
	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	

# 8.4.7 Configure Totals

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

)		Configure Totals	>						
	Caption	Visible	Sort						
÷	Seller	$\checkmark$	None						
	Quote Description	✓	None						
	Minority Type	✓	None						
	Notes	✓	None						
	Extended Price		None						
	Item Taxes		None						
	Quote Tax		None						
	Bond		None						
	Item Conditions		None						
	Quoted Items Total		None						
	Special Conditions		None						
	Quoted Total	$\checkmark$	None						
	Substitute Values		None						
	Comparable Total	$\checkmark$	Ascending						
	Awarded Total		None						
	Last Update		None						
	tions ocation: O Top	Bottom							
			OK 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

# 8.4.8 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.

Pri		斗 By Quote Grou	Set All to	Reviewed	2		Duplicate Quote		kage Entire Quote	Award		Lock	101	Quoted Items	JESÍ Zer		🕈 Configure	e Totals	Session Recap	
d Pre	eview	🛸 All Quote Group	18 🖓 Set All to	Not Reviewed	Edit Resource	Edit Quote	Ignore Quote	©∕ Ed	t Package	ni Award	And Lock	🔒 Unlock	Edit Prices	🔛 Unit Price	📝 Sco	ope Items	🔓 Set Subs	titute Ranking	📍 Auto Award 👻	
P Eq	port to Excel	🗐 Al Quote Items			Earchesource	East Quote							Eur Prices	Substitute Values	🤥 igr	nored Quotes	🛗 Default 🛙	Data Blocks		
	Print	Layout	Quote Gr	oup Status	Resources				Quotes						Vie	w			Tools	
Cost E	Breakdown St	ructure (CBS) Reg	ister Que	ote Register	Quote Con	nparison & Awar	d - Resources	0												
rag co	olumns here to g	group													Find:	[Search Fo	r] …	Saved views	Previous View	-
	esource 🛓	. Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug		Detail	Example Asphalt I		Example Ve Asphalt Ma		Example Vendor 1 Pipe Materials for site improvements	Example 1 DBE Pipe Mate					
м	ААМ	Asphalt Mix	Finish)	36,750.00	Ton	\$31	.50	\$34.13	\$34.	3 2 8	\$31.50	0	\$35.70	\$34.13		\$34.13				
» 🛛	AFA	Fine Aggregi					.25				\$7.25		\$7.35	\$8.19						
м	PP 10	Pipe 10" PVC	SDR21	12,600.00	Linear Feet	\$13	.65	\$3.28	\$3.2	15	\$3.28		\$3.28	812.60	10	\$13.65				
м	PP24	Pipe 24" PVC	SDR35	3,000.00	Linear Feet	\$22	.05	\$20.48	\$20.4	ß	\$20.48		\$20.48	825.20	10	\$22.05				
м	PR36	Pipe RCP 36	In	1,024.00	Linear Feet	\$32	.55	\$34.13	\$34.	13	\$34.13		\$34.13	831.50	18	\$32.55				
		Scope Iter	15																	
		Summary																		
		Minority T	/pe												0	DBE				
		Quoted To	tal				\$1,40	6,973.75	\$0.0	10 \$1,	171,100.70	\$1,32	5,646.00	\$266,616.00	\$	271,471.20				
		Comparab	le Total	<			\$1,40	6,973.75	\$1,406,973.7	'S \$1,	308,747.30	\$1,46	3,292.60	\$1,535,943.15	\$1,5	540,798.35				

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

	Caption	Visible	Sort	
	Seller	$\checkmark$	None	
	Quote Description	$\checkmark$	None	
	Minority Type	$\checkmark$	None	
ı	Notes	$\checkmark$	None	
	Extended Price		None	
	Item Taxes		None	
	Quote Tax		None	
	Bond		None	
	Item Conditions		None	
	Quoted Items Total		None	
	Special Conditions		None	
	Quoted Total	$\checkmark$	None	
	Substitute Values		None	
	Comparable Total	$\checkmark$	Ascending	
	Awarded Total		None	
-	tions	Bottom		

#### 6. Select OK.

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

ag colun	mns here to group												Find: [Search Fo	n]	Saved views:	Previous View	
Reso Code	e 🗠	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor Asphalt Material	1 8	Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for s improvements	ite DBE	nple Vendor 4 Materials				
MAA	м	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	18 \$3	1.50	\$35.70	\$34.	13	\$34.13				
MAE	A	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	10 1	7.25	8 \$7.35	\$8.	19	\$8.19				
MPP	10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	4	(3.28	\$3.28	8 \$12.	60 👔 🤇	\$13.65				
MPPS	24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$.	10.48	\$20.48		20 🔋 🤇	\$22.05				
MPR:	:36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$	94. <i>13</i>	\$34.13	8 \$31.	50 🔋 d	\$32.55				
		Scope Items															
		Summary															
		Minority Type											DBE				
		Notes						Example Note		<u> </u>			D .				
		Quoted Total				\$1,406,973.75	40.00			<sup>^</sup> 5.00	\$266,616.		\$271,471.20				
		Comparable Total	<			\$1,406,973.75	\$1,406,973.75			2.60	\$1,535,943.	15	\$1,540,798.35				
									ок	v							

### 8.4.9 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.

File	Setup	Estimate	Quote	Price	Execution	System	Integrations	Actions	
📑 Prir	nt	🔉 By Quo	te Group	😪 Set All t	to Reviewed			💫 Duplicate Quote	🔗 Package Entire Quote
🖏 Pre	view	🛸 All Quo	te Groups	强 Set All t	to Not Reviewed		2	💋 Ignore Quote	🅎 Edit Package
🛃 Exp	port to Excel	R All Quo	te Items			Edit Cost Item	Edit Quote		
1	Print	Layo	out	Quote G	roup Status	Cost Items			Quotes

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**

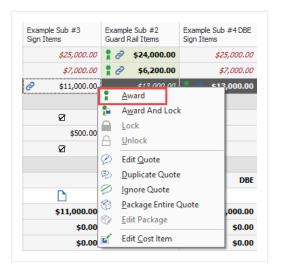
	Name	Definition
1	Totals per Quote Group	Ability to see the Awarded Total Plug, Detail and Quote amount per Quote Group
2	Total Awarded Amount	Visibility into the Total Awarded Amount per Quote Group
3	Comparable totals	Better visibility into the Comparable totals per Quote Group
4	Expand/Collapse	Expand/Collapse individual or All Quote Groups to display the quote items

d I	Preview S Export to Excel	All Quote All Quote All Quote	Groups	<b>A</b>	Edit Resource	e Edit Quote	💫 Duplic	ate Quote e Quote		kage Enti Package	re Quote	📍 Award	And Lock	<b>A</b>	Edit Prid	es	Quoted Its Unit Price Substitute		Zero Items       Scope Items       Ignored Quot
	Print	Layou	it		Resource	5			Qu	iotes									View
05	t Breakdown Stru	icture (CBS	5) Regist	er	Quote Co	mparison & Awa	rd - Reso	ources C											
rag	g columns here to gro	pup													Fin	d: [Sear	ch For]		- Saved views:
	Quote Group		<u> </u>	Plug		Detail		Quote		Quote	Group Total								
·	<ul> <li>Asphalt Materia</li> </ul>	ls			\$0.0	0	\$0.00	\$1,1	71,100.70		\$1,171	, 100. 70							
	Resource Code	Descript	ion			Utilization Count	Unit of Measure		Unit Cost (Scale 1)		Plug		Detail			ample Ve phalt Mat			ole Vendor 2 It Materials
	MAAM	Asphalt	Mix (Finis	h)		36,750.00	Ton			\$31.50		\$34.13		\$34.	13 🚦	0	\$31.50	0	\$35.70
	MAFA	Fine Age	gregate			1,860.00	Ton			\$7.25		\$8.19		\$8.	19	Ø	\$7.25	Ø	\$7.35
		Scope	Items																
		Summa	ary																
		Minor	ity Type																
		Quote	ed Total	(	2						\$1,2	59,327.15		\$0.0	00	\$1,17	1,100.70		\$1,325,646.00
4			arable To	tal	<b>-</b> <						\$1,2	59,327.15	\$1,2	69,327.1	15	\$1,17	1,100.70	:	\$1,325,646.00
-		Awar	ded Total	\$1,17	1,100.70							\$0.00		\$0.0	00	\$1,17	1,100.70		\$0.00
Ę	<ul> <li>Pipe Materials</li> </ul>				\$0.0	0	\$0.00	\$2	71,471.20		\$271	,471.20							
	Resource Code	E Descript	ion			Utilization Count	Unit of Measure		Unit Cost (Scale 1)		Plug		Detail			ample Ve De Materia		DBE	ole Vendor 4 laterials
	MPP 10	Pipe 10"	PVC SDR	21		12,600.00	Linear F	eet		\$13.65		\$3.28		\$3.2	28 0		\$12.60	10	\$13.65
	MPP24	Pipe 24"	PVC SDR	35		3,000.00	Linear F	eet		\$22.05		\$20.48		\$20.4	<del>1</del> 8 O		\$25.20	10	\$22.05
	MPR36	Pipe RC	P 36 In			1,024.00	Linear F	eet		\$32.55		\$34.13		\$34.	13 🔗		\$31.50	10	\$32.55
		Scope	Items																
		Summa	ary																
		Minor	ity Type				_ 3											0	DBE
		Quote	ed Total					-			\$13	37,646.60		\$0.0	00	\$26	6,616.00		\$271,471.20
		Comp	arable To	tal	<						\$13	37,646.60	\$13	37,646.0	50	\$26	6,616.00		\$271,471.20
		Awar	ded Total	\$271,4	471.20							\$0.00		\$0.0	00		\$0.00		\$271,471.20

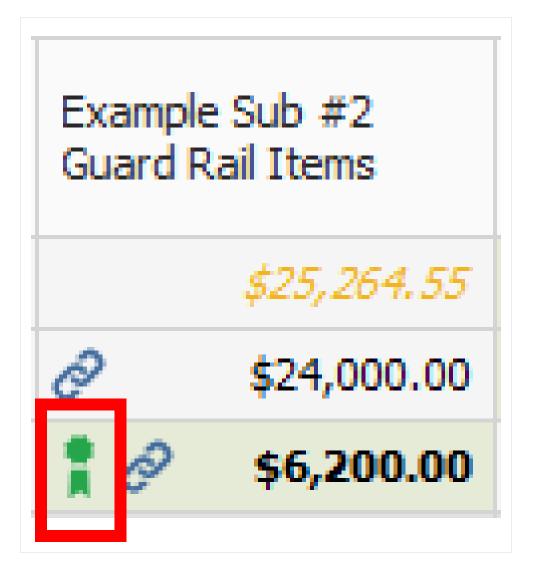
You can scan through all the quote groups in the estimate and see if you are carrying the most appropriate quote. You can also review the Totals per Quote Group and better analyze the risks in the estimate based on whether the cost is a plug number, detailed estimate or a quoted value.

#### 8.4.10 Compare and Award Quotes

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



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		le Sub #1 Rail Items
17	Toll Booth	1.00	Each	\$40,000	₽ \$40,0	\$25,000.00	\$25,264.55	\$25,264.55	10	\$40,000.00
18	Guardrail Type 2	1,000.00	Linear	\$25.00	₽ \$25,0	\$25,000.00		\$24,000.00	10	\$25,000.00
19	Guardrail Type 3A	200.00	Linear	\$30.00	₽ \$6,00	\$7,000.00	\$7,000.00	\$6,200.00	10	\$6,000.00
20	Type 4 Signs	1,000.00	Square	\$15.00	<b>\$15,0</b>	\$15,000.00				
27.1	Electrical Work	1.00	Each	\$5,000.00	<b>\$5,000</b>	\$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:	11/1	3/2019 9:0

NOTE

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

#### 8.4.10.1 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	<b>\$24,000</b>	\$25,000.00		🕴 🔗 🖇 \$24,000.00	\$25,000.00	850,000.
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	<b>\$6,200.00</b>	\$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.
	Comparable Total	<				\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000.

#### 8.4.10.2 Award Status

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

uote Reg	ister Q	uote Compar	ison 8	& Award - Cost ite	ms O													
Quote Gro	oup(s)	×	Drag	g columns here to gro	up										Find: [Search For]	Saved view	vs: Previous View	-
< <	Descri h			CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	.o	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items		HD Engineering Group Electrical Work	HD Engineering Group Concrete, Sitework	Architectural Designs, Inc. Electrical Work	Example Sub #3 Sign Items
1	Guardrail W	ork v		17	Toll Booth	1.00	Each	\$40,000.00	S40,000.00	\$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		\$\$0,000.00		
				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			\$13,000.00	8 \$13,000.00				& Off \$300,000
				27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000.00	\$5,000.00					\$3,500.00		\$3,700.00	
			→		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

#### 8.4.10.3 Review

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

Quote Group(s) ×									
$\checkmark$	Description 🛓	Reviewed							
$\checkmark$	Electrical Work								
$\checkmark$	Guardrail Work	$\checkmark$							
$\checkmark$	Sign Work								

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.

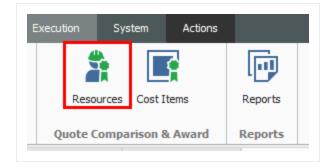
Quote Group(s) ×								
$\checkmark$	Description 📃	Reviewed						
$\checkmark$	Electrical Work							
$\checkmark$	Guardrail Work	$\checkmark$						
✓	Sign Work	✓						

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.

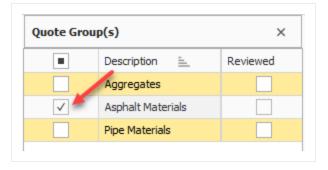
The following steps walk you through comparing and awarding the Aggregate quotes.

#### 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.



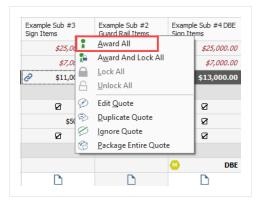
3. Under Description, select Asphalt Materials.



- 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.

				1
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 Vendor 1 ohalt Materials	2	Example Vendor 2 Asphalt Materials				
\$34.13	1	si \$31.50	0	\$35.70				
\$8.19	1	s7.25	e	\$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

#### 8.4.11 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

#### 8.4.12 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 Item	Duplicate ( Dignore Qu Edit Quote	ote 🎲 Edit Pad		2 Award	ock	Edit Prices	nit Price	Scope Items 🔒 Si Ignored Quotes 🛗 D	onfigure Totals et Substitute Ranking efault Data Blocks	<ul> <li>Session Recap</li> <li>Auto Award -</li> </ul>
Cost Items			otes					View		Tools
Quote Compa	rison & Award - Cost item	s Q								
columns here to grou	up						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									ø
	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 <sup>2</sup> )	🖗 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		500-	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 ner e 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			

### **Overview – Quote Comparison and Award – Scope Items**

	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 (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										<b>2</b> <sup>2</sup>
	Pipe Materials				Surveying and Layout									\$500.00	
	Sign Work				Temporary Traffic Control De	evices									2
					Trench and Backfill for Electr	ical Work								<b>3</b> -	
					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	<b>\$0.00</b>	\$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	≞_	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		
	Descripti	ion: * Electrical	Work			
	Award Stat	us: Complete				
	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		<ul> <li>•</li> <li>•</li> <li>•</li> </ul>	\$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 Codes	Tags	Work Break	down Structures	Quote Group Tags
Drag columns her	e to group			
Description		<u>=</u>	Award Status	Utilized In Quotes
+ Aggrega	tes		Complete	$\checkmark$
+ Asphalt	Materials		Complete	$\checkmark$
+ Bridge W	/ork		Complete	
+ Commer	cial Work		Complete	
+ Concrete	e Beams		Complete	
+ Concrete	e Materials		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
<b>2</b> 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)	
<ul> <li>Only show Quote Group tags that are currently utilized in this job</li> <li>On the resulting RFQ record, only list resources with utilization currently greater than zero</li> <li>Create RFQs using Default Seller data</li> <li>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.</li> </ul>	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 <b>D</b>	0.1.5.7	
Foundation Setup Da	ata Register	Quote Group Ta	
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	✓		

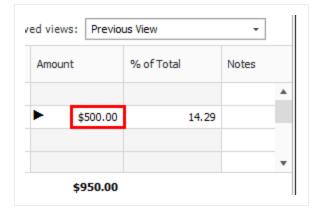
- 26. Assuming HD Engineering is excluding certain scope items from this quote, click on the **Included checkbox** to exclude (uncheck) the following scope items:
  - Surveying and Layout
  - Painting Electrical Equipment
  - Temporary Power and Lighting

	g columns here to group		Find: [Search 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

\$4,450.00	\$3,700.00	\$3,700.00	\$5,000.00
\$0.00	\$0.00	\$0.00	\$5,000.00
\$3,500.00	\$3,700.00	\$0.00	\$5,000.00
\$950.00	\$500.00	\$0.00	\$0.00

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.

	Substitute \	/alues 📌 Config		ew					
┢						Caption	Visible		Sort
					→	Minority Type		✓	None
						Quoted Total		✓	None
	Unit of		Total Co	-		Comparable Total			Ascending
	Measure	Unit Cost	(Forecas			Awarded Total		✓	None
.00	Each	\$0.00	•	\$0.0		Quoted Items Total		$\checkmark$	None
	Laci	\$0.00	<b> </b>	30.0		Special Conditions		✓	None
						Last Update		✓	None

- 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.

\$3,70 \$3,70 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Award And Lock
	_
2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Lock Unlock Edit Quote Edit Cost Item Edit Package \$300.00
\$4,200.00	\$4,450.00
\$3,700.00 \$0.00 \$3,700.00	\$4,450.00 \$0.00 \$3,500.00
\$5,700.00 \$500.00 11/13/2019 1:0	\$950.00 \$950.00 11/13/2019 2:2

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:

# **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 Pipe Mat		r 3	Example DBE Pipe Mate	
MPR36	Pipe RCP 36 In	\$34.13	e	\$	31.50	10	\$32.55
MPP24	Pipe 24" PVC SDR35	\$20.48	0	-	00.00	0.0	433.0F
MPP 10	Pipe 10" PVC SDR21	\$3.28	P	2	<u>A</u> ward		
	Scope Items				_	And Loci	c
	Summary				Lock Unlock	,	
	Minority Type			-	_		
	Quoted Total	\$0.00	\$	~	Edit <u>Q</u> uote		
	Comparable Total <	\$137,646.60	\$	-		ate Quote	2
	Awarded Total: \$271,	\$0.00		· ·		Quote	
	Quoted Items Total	\$0.00	s	-		ge Entire (	Quote
	Special Conditions	\$0.00		67	<u>E</u> dit Pa	скаде	
	Last Update		7/14/2	2	Edit <u>R</u> e	source	

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	Find: [Search For]	Save	ed views: Previous	View	•
Tax Rate	Condition Adjustment Percentage		Condition Adjustme Amount	ent	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**.

Res	sources	Cost	Items				
Drag	g columr	ns here to	o group				
	Code	<u>1</u>	ration		Qu	antity	Unit of Measure
๕	MPP 10	)		1		12,000.00	Linear Feet
	MPP24	ŧ		1		3,000.00	Linear Feet
$\rightarrow$	MPR36	5		1		1,024.00	Linear Feet
*	EZ.	0	_				
		<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	
		UnLink	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.

Line Number       Code       Quantity       Unit of Measure         Iaries       Varies       Linear Feet       Image         ags       Quote Group       Tag 1       Tag 2       Tag 3         vipe Materials       Varies       Varies       -         rice & Setup       Item Note       Seller Condition         Setup       Condition Adjustment       Varies         ✓ No Split       Free       Condition Adjustment	aries				
Varies     Varies     Varies     Linear Feet       Fags Quote Group     Tag 1     Tag 2     Tag 3       Pipe Materials     Varies     Varies     -       Price & Setup     Item Note     Seller Condition       Setup     Setup     Condition Adjustment       ✓ No Split     Free     Condition Adjustment	tem				
Fags       Quote Group       Tag 1       Tag 2       Tag 3         Pipe Materials       Varies       Varies       •         Price & Setup       Item Note       Seller Condition         Setup       Condition Adjustment       Amount:       Varies					
Quote Group       Tag 1       Tag 2       Tag 3         Pipe Materials       Varies       Varies         Price & Setup       Item Note       Seller Condition         Setup       Condition Adjustment       Amount:         Varies       Varies	/aries	Varies	Varies	Linear Feet 🔹 👻	
Pipe Materials     Varies       Price & Setup     Item Note       Setup     Condition       Varies     Amount:		Teel	T 2	T 2	
Price & Setup Item Note Seller Condition Setup ✓ No Split □ Free Condition Adjustment Varies		-		Tag 5	
			Percentage:		
Plug Unit Price: Varies Unit Price: Varies	☑ No Split Plug Unit Price:	Varies	Price	-10.00 Varies	
Plug Unit Price:     Varies       DBE Allowance %:     60.00       Extended Price:     Varies	Plug Unit Price:	Varies	Price Unit Price:	Varies	
	Plug Unit Price: DBE Allowance %:	Varies 60.00	Price Unit Price:	Varies 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**

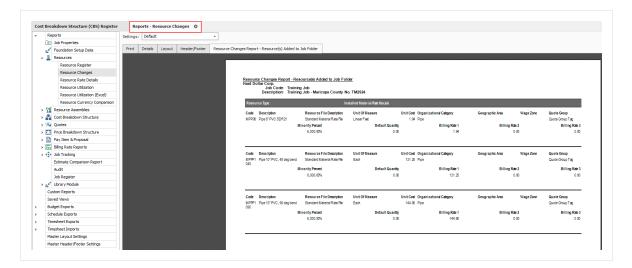
9.1 Reports Menu	104
9.1.1 Non-Modal Report dialog box	104
9.1.2 Adjustable Reports	104
9.1.3 Output Settings	108
9.1.4 Helpful Reports	128
9.1.5 Standard Proposal	129
9.1.6 CBS Details	130
9.1.7 Audit	131
Exercise 9.1 – Run a System Report	132
9.2 Register Reports	134
9.2.1 Register Report Output Settings	139
Exercise 9.2 – Create a Custom Register Report	140
Lesson 9 Review	141
Lesson 9 Summary	141

# 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.

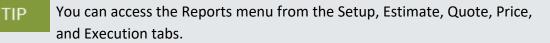
For example, you may choose to run the CBS Details Report several times to satisfy different needs or for different audiences, and include or exclude specific data depending on what you or the report recipients want to see.

- 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

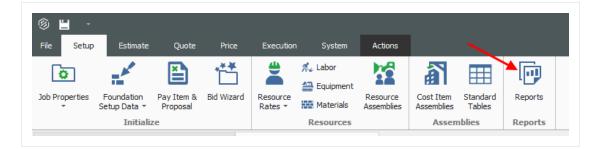
The following steps take you through a brief overview of the Reports menu and how you can access it.

#### 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 Pro
	Re	ports	Settings: Default -
L	0	Job Properties	Settings.
L	*	Foundation Setup Data	Print Details Layout Header/Footer
~	· 👗	Resources	
L		Resource Register	Print to Printer
L		Resource Changes	Print Settings
L		Resource Rate Details	-Print Setungs -
L		Resource Utilization	Printer: Adobe PDF
L		Resource Utilization (Excel)	
L		Resource Currency Comparison	
>	20	Resource Assemblies	
>	÷	Cost Breakdown Structure	
>	9	Quotes	
>	$\Delta$	Price Breakdown Structure	O Export to File
>		Pay Item & Proposal	Export Settings
>		Billing Rate Reports	
>	÷	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	js: 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	Preview
	Saved Views	
•	Budget Exports Schedule 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

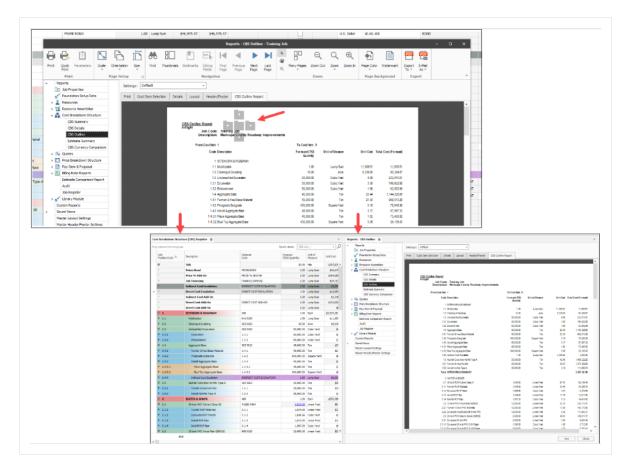
The Print tab includes three options for printing output: Print to Printer, Export to File, and Preview. Export file outputs include PDF, Excel, text, and more.

#### **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.

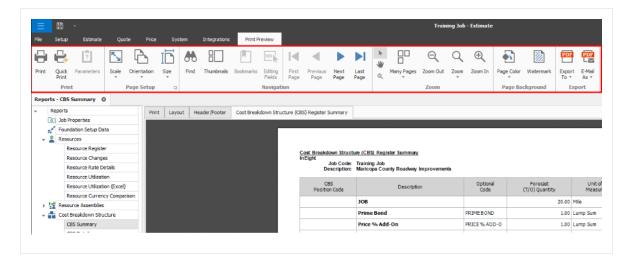
0	Job Properties	Print Det	ais Layout	Header/Footer	Resource Ass	embly Register Sum	tary								
-	Soo Properties														
	Resources														
	Resource Assemblies														
× 11	Resource Assembly Register					Resource Asse InEight	mbly Register Summary								
	Resource Assembly Utilization					Jo	b Code: Training Job ription: Maricopa County Roadway Im								
	Resource Assembly Currency Com					Desi	imption: Mancopa County Roadway Im	provements							
- 6	Cost Breakdown Structure					Code	Description	Resource File Description	Quantity	Unit of Measure	Unit Cost	Total Cost	Currency	Organizational Category	Geogra
	CBS Summary					CCONC	Concrete Crew	Standard Assembly Fi	1.00	Hour	\$375.03	6375.03	U.S.Dollar	Concrete	
	CBS Details					CGRADE	Grading Crev	Standard Assembly Fi						Earthwork	
	CBS Outline									Hour	\$234.73		U.S.Dollar		
	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	Asphalt	
	Quotes					CPIPE	Pipe Crew	Standard Assembly Fil	1.00	Hour	\$343.54	\$343.54	U.S.Dollar	Pipe	
	Price Breakdown Structure					CPIPEM	Pipe Fitting Assembly (with material)	Standard Assembly Fil	1.00	Each	\$410.82	\$410.82	U.S.Dollar	Pipe	
¥ 🗎	Pay Item & Proposal Standard Proposal					CSCRAP	Scraper Crew	Standard Assembly FI	1.00	Hour	\$1.111.21	\$1,111,21	U.S.Dollar	Earthwork	
	DOT Proposal					CTRUCK	Truck Excavate-Load-Haul Crev	Standard Assembly Fil		Hour	\$618.72		U.S.Dollar	Earthwork	
	Pay Iten Summary														
	Pay Item Currency Comparison					CWELD	Welding Crew	Standard Assembly M		Each	\$248.64		U.S.Dollar	Welder	
	Pay Item Price Dreakdown					MASRH	Asphalt Material Assembly (with yiel	Standard Assembly Fil	1.00	Ton	\$29.45	\$29,45	U.S.Dollar	Asphalt	
	Billing Rate Reports					MFORM	Concrete Forming Assembly	Standard Assembly Fi	1.00	Square Feet	\$28.88	\$28.88	U.S.Dollar	Concrete	
-	Estimate Comparison Report					OD8	DozerD8-Operated	Standard Assembly Fi	1.00	Hour	\$204.22	\$204.22	U.S. Dollar	Earthwork	
	Audit					OGRAD14G	Grader 14G - Operated	Standard Assembly Fil	1.00	Hour	\$90.82	\$90,82	U.S.Dollar	Earthwork	
	Job Register					OSCRAP623	Scraper 623 - Operated	Standard Assembly FI	1.00	Hour	\$157.62	\$157.62	U.S.Dollar	Earthwork	
12	Library Module						14								
0	stom Reports														
58	wed Views														
м	ister Layout Settings														
	ster Header/Pooter Settings														

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.



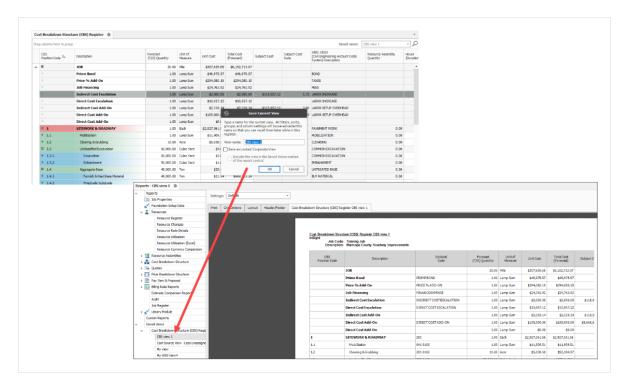
#### Print Preview Ribbon

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**.

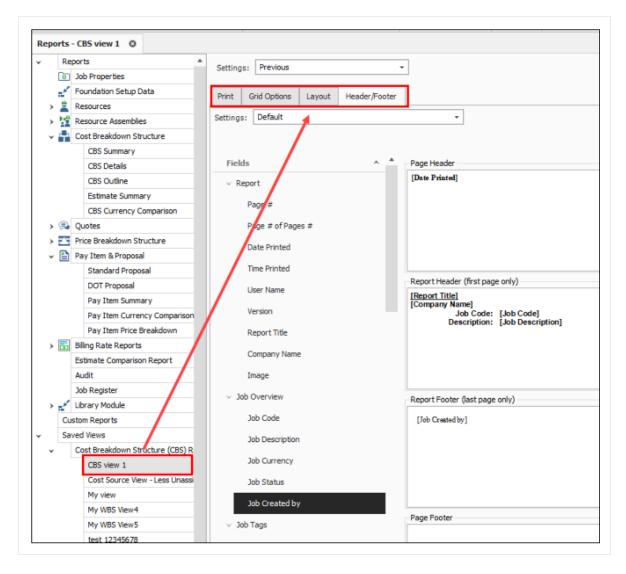


#### 9.1.3.2 Apply custom Layouts and Headers/Footers to register reports

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.

	Reports	* Settings: Previous							
G	Job Properties	Settings: Previous							
5	Foundation Setup Data	Print Grid Option	s Layout	Header/Footer	Cost Breakd	lown Structure (CBS) Reg	ister CBS view 1		
> 2	Resources								
> !	Resource Assemblies								
<b>~</b>	Cost Breakdown Structure					6/16/2022			
	CBS Summary								
	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	Optiona
> 9	Quotes					Position Code		Description	Code
> E	Price Breakdown Structure						JOB		
~ [	Pay Item & Proposal								
	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 Orientation Orientation Orientation Orientation	t (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
Detail Level 1:	Arial Narrow, 8, Regular		Cost summary:	2	Figures
Header Level 2:	Arial Narrow, 8, Bold		Unit cost:	2	1
Detail Level 2:	Arial Narrow, 8, Regular		Quantity: Percent:	2	
			Use thousand	ds separator	
			Use currency		
			Show zero va	lues as blank	
			Currency: As-E	intered	-

#### 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
~ J	ob Overviev	N		Job Code: [Job Code] Description: [Job Description]	4
	Job Code				
	Job Desci	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.

<b>b</b> Properties	0																							
rerview Cov	er Sheet Cost Basis Minority	Setup PuelCost 3	Folder Tegs Pricing	Schedule 0	sh Flow Eovipment	Heitleren	oe Benchmerking Atterne	e leers																
dentification																								
Location:	2-10 MP 100 to MP 120			Type: Highwa	y and General Engineer	ring																		
City:			Dr	pineer: Doenple	Engineer Fred Jones																			
County:	Paricopa			Dunes Haricap	Courty Court				Cost Breakdown	Structure De	etalla.					-	PO # AC640							и внт 🛞
Country	United States +	Job Properties 0								Code: Train	ning Job Icopa County P MP 100 to MP	Roadway Iro	Contracto			-								
States	Arappa +						g Schedule Ceshiflow		Lec	cation: 1.10	MP 100 to MP 8020 3:00 PM	120		-									Owner: Mari	cope County Tom Std
Latinder			-	dy set p   rue	COST 300 PODer 14	ис	g Schedue Ceptimon	CORD.PK.				_	_											
Longitude	-	Jub Fulder Teg Assignm	erns Li New Tag			Teg 12:			FromCos	othern: 1	_		Cost New	ToC	Cost Rem: 0.10		_			1.0.	and Total Coarts by Cate			
Longitude								-	CHS POLIS	-	_	int form		Questing UK		Unit Cost Total C	- 140	Charles and	et Rented Figure			Address of		Allowance Guildon Category 1
raposal			19(2924				6/14/2022	-		100							-							
Bid Deb	r: 1/5/2020 +	Teg	h			Teg 15:				STENORES	OADWAT	Deal		18 544		A27,01100 1,927,M	130 411,0024 411,0024		40 I	140 (314/487 140 (314/487		1.0	75,20994	500-60 1,340-00 500-60 1,340-00
Eld Time	E: 0:00 AM	Teg	t farah			Teg 15:			50															
Estimato	Example Prime Contractor 1	Teg	× )			Taxan			Fay tan having a Default Properties		WORK & ROADMAY)	) Cast Cane		741	7427	Tog 1	Tape		Tag 7					
Relievation	togineer's Office	Tag	Contract # 5532	$\sim$		Teg 18:					Renal Code	United Code		Denaria Ba	Quella Desar	Quertly Drive	March Alex	NO.						
Dates Estimate		Тер	n PO # AC6443		3	Teg 19:					200			1.08		Paylam	100.00%							
owners Ustanate		Teg	k .			Teg 28:	6/13/2022		Owtpath Pay Railed		1 30 CD	Wage Sociel 0.3		1 <b>age Sicole 3</b> 0.00	Resource Work Ris	Resource Pay Hes 8.00	Default SMIT Anangemente	Vot Rt.	Sect	Shifts Cay	DaysWook 5.00			
		Tep	n			Teg 21:		0.00	Protection		Dave	51.00	Fourt	Non-From	Coulo-Hours	Cost: Duration	ContOne			VIEW PROPERTY.	umpath It.			
		Tes 1	Aggregate Date			Teg 22					421.00	421.55	1,452.37	18,258.07	10,04541		0,076.08	6,076.08	709.30	211.04	267.KS			
			: New Tag			Teg 23:			UN Deble		10	0.0	0.00	0.00	0.00	Durative FUM	48120	401.00	3,812.37	13,5567	10,04541			

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.

up Data egister hanges ate Details tilization tilization (Exce) urrency Comparison	Fields > Report > Job Overview < Job Tags	<u>^</u> *	Page Header		
egister hanges ate Details tilization tilization (Excel) urrency Comparison	<ul> <li>&gt; Report</li> <li>&gt; Job Overview</li> <li><ul> <li>&gt; Job Tags</li> </ul> </li> </ul>	^ <b>*</b>	Page Header		
hanges ate Detais tilization tilization (Excel) urrency Comparison	<ul> <li>&gt; Report</li> <li>&gt; Job Overview</li> <li><ul> <li>&gt; Job Tags</li> </ul> </li> </ul>	· •	Page Header		
hanges ate Detais tilization tilization (Excel) urrency Comparison	<ul> <li>&gt; Report</li> <li>&gt; Job Overview</li> <li><ul> <li>&gt; Job Tags</li> </ul> </li> </ul>				
ate Details tilization tilization (Excel) urrency Comparison	<ul> <li>&gt; Job Overview</li> <li>&gt; Job Tags</li> </ul>				
tilization tilization (Excel) urrency Comparison	✓ Job Tags				
tilization (Excel) urrency Comparison	-				
urrency Comparison	-				
	Tag 1		Report Header (first page only)		
nblies	Tag 2		[Report Title]	[User Name]	
n Structure	109.2		[Company Name] Job Code: [Job Code] Description: [Job Description]		
	Tag 3		Description: [Job Description]		
n Structure	Tag 4				
posal	-				
orts	Tag 5				
arison Report	Tag 6		[Cempany Name]		
	Tag 7				
	Tag 8				
	T 0		Daga Faster		
	Tag 9			Convelopt (W22 InElast Inc. All Plaste Research	Page # of Pages #
ings	Tag 10		[one rimed] [rime rimed]	copyright wazz incight inc. An regins neserved.	Folde + Or Folder +1
ter Settings	Teo 11				
	posal orts arison Report	n Structure Tag 4 posal Tag 5 orts Tag 6 rison Report Tag 6 Tag 7 Tag 8 Tag 9 Tag 9 Tag 9 Tag 10	n Structure Tag 4 posal Tag 5 prison Report Tag 6 Tag 7 Tag 8 Tag 9 Tag 9 Tag 9 Tag 10	n Structure posal orts rison Report rison Report Tag 6 Tag 7 Tag 8 Tag 9 Tag 9 Tag 10 Page Footer Page Page Page Page Page Page Page Page	Structure         Tag 4         Image: Comparison of the structure         Image: Comparison of the structure         Image: Comparison of the structure         Report Footer (last page only)         Image: Comparison of the structure         Comparison of the structure         Image: Comparison of the structure         Image: Comparison of the structure         Comparison of the structure         Image: Comparis

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	
		I Report Title

#### 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

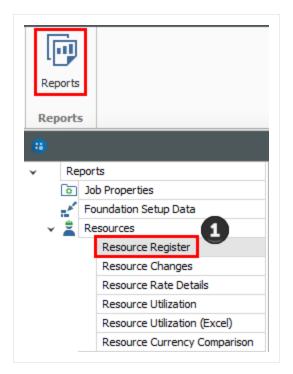
Once you've configured your settings for the report, you can save them as a custom version of that report.

r Re	ports		ettings	Estima	te Summary	- Foreman	•	Alternate Sc	enario:
0	Job Properties		lettinga	Loand	te bannar y	- or critari		BASE	
	Foundation Setup Data	F	Print	Cost Item	Selection	Details	Layout	Header/Footer	
🗸 👗	Resources			00001100	Delection		20,000		
	Resource Register	~~~~~	Print	t a contig	uous range	of cost iten	ns:		
	Resource Changes	~~~~~	Fr	om:	5.1				•
	Resource Rate Details	~~~~~							
	Resource Utilization	~~~~~	То	e	6.2				•
	Resource Utilization (Excel)	~~~~~							
	Resource Currency Comparison	~~~~~		ct cost ite	ems to print	from the re	aister hela		
-> 🞦	Resource Assemblies		O bere	ce cose na	and to print	from energ	igister bere		
~ <b>~</b>	Cost Breakdown Structure	D				Find:	[Search F	or] …	Saved
	CBS Summary	~~~~							
	CBS Details	~~~~~	Indu	ide	CBS Position Cod	le 🗎	Description	1	
	CBS Outline		<u>_</u>				Prime Bond	1	
~	Estimate Summary	~~~~~					Price % Ad		
	5 Estimate Summary - Forema	n							
							Job Financ	ina	

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		•			
	٥	Job Properties	beeninger		-					
	*	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							
		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
	<b>ort to File</b> 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:
<ul> <li>Portrait</li> <li>Landscape</li> <li>Paper Size: Le</li> </ul>	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.

Print	Details	Layout	Header/Foo	oter			
Settir	ngs: Default	t		•			
<b>#</b> (	되 🔯 😵		nsert Field 👻				
Page	Header						
Repor	t Header (first	t page or	ıly)	5			
[Repo	ort Title]	t page or	ıly)	6	R	esource Utiliza	tion
[Repo	pany Name] Job Co	ode: [Jo	ob Code]	5	R	esource Utiliza	tion
[Repo	pany Name] Job Co	ode: [Jo		5	F	esource Utiliza	tion

- 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	Ŧ
Print Details Layout	Header/Footer
Filter by currency: Report Type	No Filter
<ul> <li>Resource Utilization S</li> <li>Resource Utilization S</li> </ul>	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.

roup By	Resource Type
Insert page breaks between the outerm ups	🗹 Labor
Resource Organizational Category	Construction Equipment
	Rented Construction Equipment
< no field selected > V	Installed Material
< no field selected > $\checkmark$	Installed Equipment
< no field selected > $\checkmark$	Supplies
e - Caldeslandes	Unique
< no field selected >	
< no field selected > V	

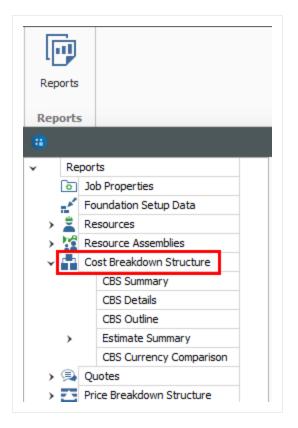
• For this example, you will not make any selections under Columns or Details

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	

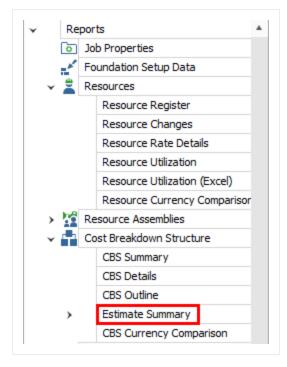
- This is just one of many ways to organize and adjust your report.
- 11. Click **Run** to run the report.
  - This report can be helpful for seeing your utilization hours, broken down by regular time and overtime hours
- 12. Click the red **X** to close this page and open the Construction Equipment 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	Default   Alternate So		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	<ul> <li>Print Resource Employment Details</li> <li>Print resources in row number order</li> <li>Print resources in alphabetical order</li> <li>Print resource costs</li> <li>Print hours for hourly resources</li> </ul>
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
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			
#	🛛 🔯 🚱 🔼 Ins	sert Field 🔹	, <b>L</b>	45

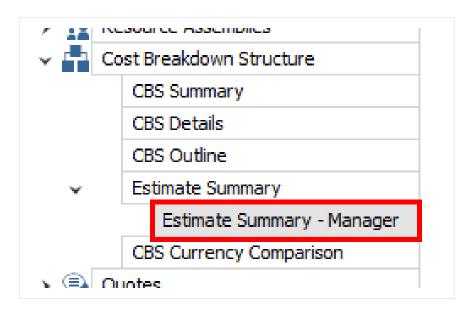
11. Select the **Save disk** icon to save the new settings.

Settings:	Default	-
⊞ €  ∎	Custom	2
# 🖌 🛙	Default	
Page Heade	r	

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

Save New Setting	s	_		×
Name:	Estimate	Summary	- Manage	r
	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

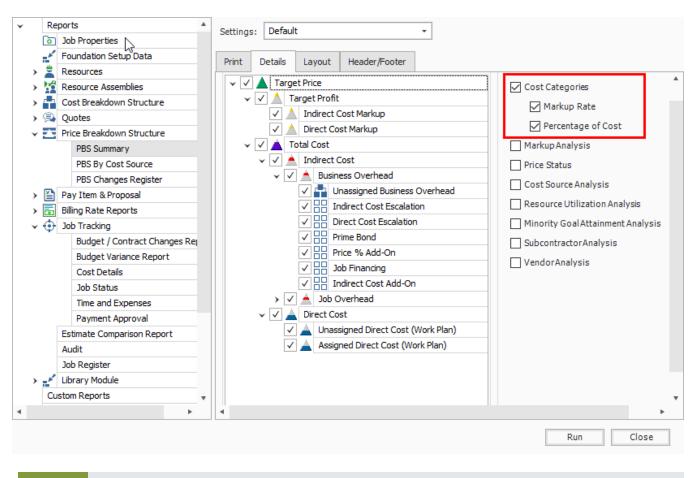
#### 9.1.4.7 PBS Summary

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.

D	<u>Proposal</u> ACME Company Job Code: Training Job Description: Training Job - Maricopa County No. TM2924					
Position Code	Line No.	Pay Item No.	Proposal Description	Quantity Unit of Measure	Unit Price	Total Price
1	22	200	Subtotal Description 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 Ton	26.50	1,060,000.00
1.5	50	303 4263	Asphalt Concrete Hot Mix Type A	38,000.00 Ton	42.45	1,613,100.00
2	18	400	WATER & SEWER			718,550.00
2.1	50	413(B) 0464	36 Inch RCP Culvert Class III	1,000.00 Linear Feet	97.45	97,450.00
2.2	70	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00 Linear Feet	29.50	354,000.00
2.3	80	800 0330	24 Inch PVC Gravity Sewer (SDR35)	3,000.00 Linear Feet	64.50	193,500.00
2.4	90	800 0400	4 Foot Diameter Marihole	16.00 Each	4,600.00	73,600.00

#### 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 C											
	ostitem: 1		To	Costitem: 0.10							
			Cost Item						Unitan	d Total Costs by Categ	ory
BS Position ode	CI Description	Cost Source	Forecast (T/O) Quantity UM		Unit Cost Total	cost Lab	or Owned Equipment Ren	ted Equipment	Materiale	Supplies	Subcontract
	Mobilization	Detail	1.00 Lun	p Sum	11,909.51 11,90	2,449.5	51 8,960.00	0.00	0.00	0.00	0.00
						2,449.5	51 8,950.00	0.00	0.00	0.00	0.00
		ode Phase Cod	le Owner's Qty. 1.00	Quote Group	Quantity Driver Pay Item	Minority Allow 100.00%	WC Override				
		ale 1 Wage Scale		Resource Work Hra	Resource Pay Hrs	Default Shift Arrangements	Work Hrs/Shift 8.00	SI	1.00	Daya/Week 5.00	
Default Pay R		0.00 0.0	0.00	8.00	8.00		0.00		1.000		
Default Pay R Produc			0.00	8.00	8.00		0.00				
Produc			00 0.00 Hours Man-Hou 80.00 80.	ra Equip-Houra	Cost / Duration	Cost/Day 1,190.95		<b>stiHour (</b> 148.87	Cost/Man-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				To item: 500 0220									
	Pay/Cost Item		Unit Cost by Category										
Code	Description	Quantity UM	Assigned Direct Cost	Labor	Owned Equipment	Rented Equipment	Materiale	Supplies	Subcontract	Fees	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	314,465.16	926.90	1,379,020.31	0.00	0.00	68,997.38	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 Structure (CBS) Register 🔹									
CBS Tree (Filter Mode) × 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.

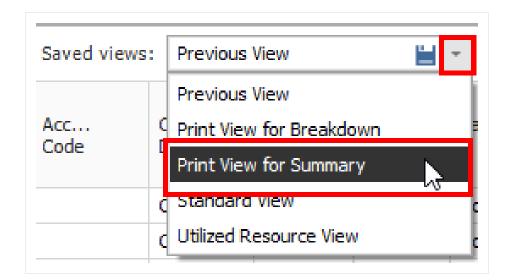
The following step by step example will walk you through creating a custom register report on resource utilization and saving it as a Saved View.

#### Step by Step — Create a Register Report

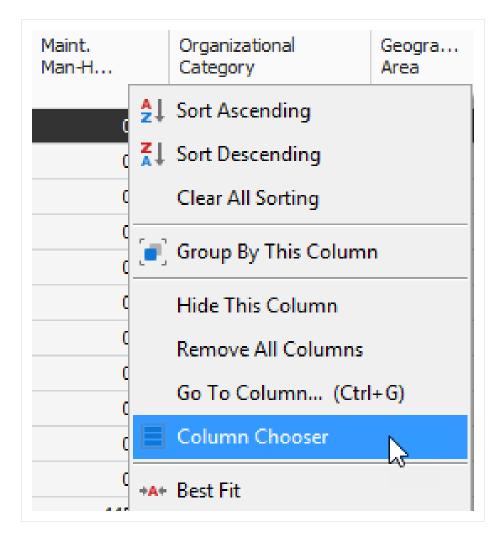
1. Open the Training Job and select Setup tab, then select the Resource Rates drop-down list.

ile Setup	) Estimate	Quote	Price	Execution System	
٥	<b>.</b>		***	Labor	â
Job Properties	Foundation Setup Data 👻	Pay Item & Proposal	Bid Wizard	Resource Rates Materials Assemblies	Cost Ite Assembli
	Initiali	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	<u> </u>	Maint. Man-H	Organizational Category
+ LL2		8,946.59	0.00	Laborer
+ L <mark>O</mark> 2		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 INEIGHT - 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	Labor Foreman	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 otal 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

#### **Lesson Topics**

10.1 Copy an Existing Job	145
10.2 Templates	146
10.2.1 Archive and Restore Templates	151
10.3 Bid Wizard	
10.3.1 Bid Wizard Updates	
10.4 Copy Estimate Data Using Edit Commands	
10.5 CBS Bid Wizard	
10.6 Snapshots	
10.6.1 Snapshot Register	
10.6.2 Creating a New Job Snapshot	
10.6.3 Editing a Job Snapshot	
10.6.4 Deleting a Job Snapshot	

10.6.5 Loading a Job Snapshot	
Exercise 10.1 – Data Reproduction	
Lesson 10 Review	
Lesson 10 Summary	

# 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.

🎯 💾 🕒													ibrary - Estimate
File Setup	Estimate	Exec	ution	System	Integrations	Actions							
(°)	-k <sup>a</sup>		山		<b>(</b>	🐔 Labor		2		4	†1+	<b>P</b>	
	1.0		H	1881		📇 Equipment	ăă.	33 L		G	1.11		
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	nitializati	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.

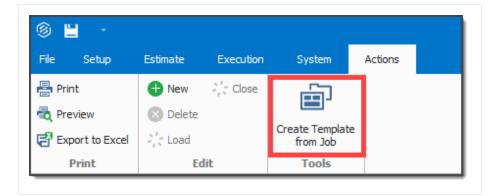
You can create templates from scratch or from existing job folders. The following steps walk you through how to create a new template from an existing job folder.

### 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.

©	
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.

iele	ect the source job:							
rag	columns here to group			Find: [Search For]	Sa	ved views: Previo	xus View	•
	Code	<u>h.</u>	In Use	Description	Status	Schedule	Location	City
→ [	E101 - Training Job KL			Sample Training Job	Bidding	Microsoft Proj	90th Street & Shea	Scotts
1	Training Job		<b>v</b>	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						
	OK Cancel						

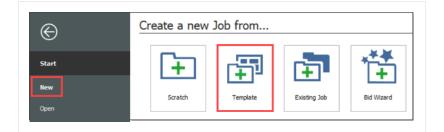
- 6. In the Code field, type **Small Project Template[your initials]**.
  - Leave Copy Cost Details and Copy PBS Changes Log checked
- 7. Click **OK**.
  - The new template is created and opens to the Job Properties form
  - You can add the description in addition to the code for any new job you are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

Job Proper	ties Ø									
Overview	Security Cover Sheet Cost Basis Minority Setup Fuel Cost Job Tra									
Code:	099KL									
Description:	Sample Tra	aining 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
File Setup	Estimate	Exec	ution	System	Integrations	Actions							
(°)			由		ŧ	🐔 Labor		2		4	†1+		
			881	1000		📇 Equipment	i i			G	1.11	·L.	
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	rmissions	Reports	

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.				
Opy from source job	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 sou job(s) into the new job.				
Jnassigned 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					
Norkbook	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				
<ul> <li>Copy from source job</li> </ul>	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	g 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

Sour	ce Job:	Training Job	*							
)rag colu	mns here	to group		Find	: [Search For.	]	Saved views:	Standard View	1	•
Incl	ude	CBS P ≞_ C	Descr	Optional Code	Forec (T/O) Quan	Unit of Meas	Unit Cost	Total Cost (Fore	Curre	Accour Code
	$\checkmark$	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
/ =	$\checkmark$	3	Unclassifie	202 0 183	50,000.00	Cubic Yard	\$4.79	\$239,582.64	U.S. Dollar	1122
	$\checkmark$	3.1	Excavat	3.1	38,227.74	Cubic Meter	\$3.90	\$149,236.48	U.S. Dollar	1122.1
œ	$\checkmark$	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
œ		4.1	Furnish	4.1	45,000.00	Ton	\$11.54	\$519,513.30	U.S. Dollar	1120.1
œ		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.

ac	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.

									- )
lude	Pay Item Number	Tag 8	Tag 9	Tag 10	User Defined 1	User Defin	ed 2	User Defined 3	Use
1	501(A) 1306				EarthWork				
$\left[ \mathbf{v} \right]$	506(A) 1322								
1	503(A) 1313				Special Constructi				
1	600 0300								
	1	<ul> <li>✓ \$06(A) 1322</li> <li>✓ \$03(A) 1313</li> </ul>	<ul> <li>✓ \$06(A) 1322</li> <li>✓ \$03(A) 1313</li> </ul>	<ul> <li>✓ 506(A) 1322</li> <li>✓ 503(A) 1313</li> </ul>	<ul> <li>✓ \$06(A) 1322</li> <li>✓ \$03(A) 1313</li> </ul>	✓         506(A) 1322           ✓         503(A) 1313           Special Construct	✓         \$06(A) 1322           ✓         \$03(A) 1313           Special Construct	✓         \$06(A) 1322           ✓         \$03(A) 1313           Special Construct	✓         \$06(A) 1322           ✓         \$00(A) 1313           Special Construct

# **10.4 COPY ESTIMATE DATA USING EDIT COMMANDS**

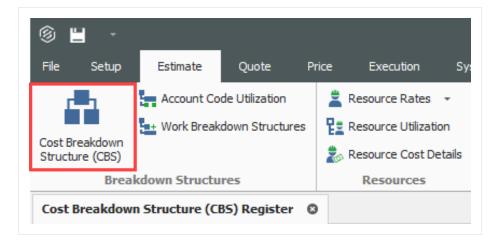
While the Bid Wizard is an efficient way to copy cost history into new projects, you may prefer to use edit commands such as copy and paste to bring cost history into your estimate.

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		×
				盫	-	?
						^
						*
]	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		→ <b>□</b>	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
<b>3</b>	Unclassified Excavation	202 0183		Cubic Yard	\$4.94	\$246,901.12		<b>□</b> 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
	<b>4.3</b>	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
<b>3</b>	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

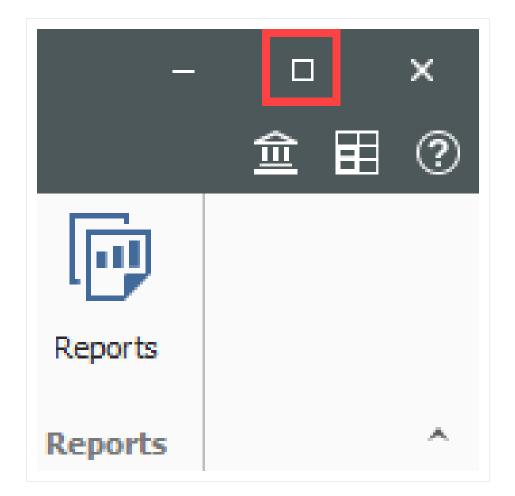
1				nate					⑧ ≝ ・			mate			
	Setup Estima	te Quote Price Execution	System Integration	is Actions More	Actions		金田	?	Ele Setup Estina	te Quote Price Execution	System Integration	Actions More Act	ions		童目
Br	reskdown ure (CBS)	Workbook Schedule Cash Flor	v Indirect 2 Price	BASE	ate Scenario: ternates	Reports			Cost Breakdown Structure (CBS)	Workbook Schedule Cash Flor	V Indirect 2 Price	Breakdown chure (PBS)	Scenario:	• Reports	
		s Workbook Schedule	_	erhead and Pr	Alternates	Reports			Breakdown Struc Re		_		Alternates	Reports	
						Reports								Reports	
tE	Breakdown Structu	re (CBS) Register O						*	Cost Breakdown Structur	e (CBS) Register Ø					
cc	olumns here to group		Find	d: [Search For] …	Saved views:	Previous View	-		Drag columns here to group		Find	[Search For] …	Saved views:	Standard View	
D	285 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)
	1	308		20.1	00 Mile	\$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 Bond	PRIME BOND	1.00	Lump Sum	\$12,328.94	\$12,3
		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	\$60,524.65	\$60,5
		Job Financing	FINANCE EXPENSE	1.1	00 Lump Sum	\$0.00	\$0.00		+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	
		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	
		Direct Cost Escalation	DIRECT COST ESCALAT	. 10	00 Lump Sum	\$19,131.77	\$19,131.77			Direct Cost 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 Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$11,005.99	\$11,00
+		Job Management & Equipment	JOB MANAGEMENT & E	1.	00 Lump Sum	\$125,896.28	\$125,896.28		+	Job Management & 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 Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,2
		Direct Cost Add-On	DIRECT COST ADD-ON	1.0	00 Lump Sum	\$104,203.16	\$104,203.16			Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$19,422.52	\$19,4
÷	1	Mobilization	641 0100	2.	00 Lump Sum	\$11,909.51	\$23,819.02		+ 1	Mobilization	641 0 100	1.00	Lump Sum	\$11,909.51	\$11,9
÷	2	Clearing & Grubbing	201 0102	10./	00 Acre	\$3,793.70	\$37,936.97		+ 2	Clearing & Grubbing	201 0102	10.00	Acre	\$3,793.70	\$37,93
	3	Unclassified Excavation	202 0183	50,000.	00 Cubic Yard	\$4.94	\$246,901.12		<b>3</b>	Unclassified Excavation	202 0 183	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	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	Embankment	3.2	42,432.79	Cubic Meter	\$2.13	\$90,34
	4	Aggregate Base	303 5912	45,000.	00 Ton	\$15.15	\$681,695.99		→ □ 4	Aggregate 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 & 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	Finegrade Subgrade	4.2	400,000.00	Square Yard	\$0.18	\$73,3
	4.3	Instal Aggregate Base	4.3	45,000.	00 Ton	\$1.97	\$88,831.33		⊒ 4.3	Install Aggregate 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 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 Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.05	\$19,1
-	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	<b>-</b> -									
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		<b>Batch Operations</b>			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.

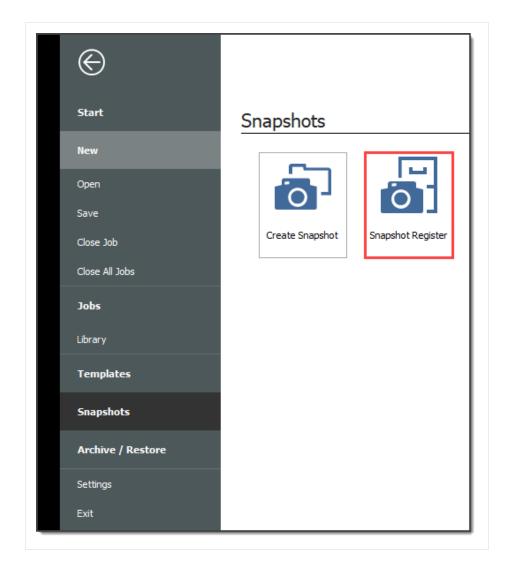
The Snapshot register has some additional columns as well. In addition to the Code, Description, Last Saved, and Version column, the Snapshot register contains all fields that are present on the Jobs register that provides you with an easier way to group, sort, filter, and find the jobs you need.

## **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	11		C Refresh		
neview	Edit	🔆 Delete All Job Snapshots		ter to Jobs Clear Snapshots Filter	[# Create N	ew Job from S	napshot
Print		Edit	V	liew		Tools	
Snapshot R							
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
- E 101							

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

Attention					
Unsaved data will not be stored in the snapshot. Save the job before taking a snapshot?					
KL					
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.

Su	uccess!
s	Successfully created Job Snapshot for Job: 'E101 - Training Job KL'.
	Never offer this help again
	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.

<i>&gt;</i>	-	E101	- Tr	aining	g Job KL	Sample Training Job	
			Sna	apsho	t Comment		Date
	+	→ Train	<	11	Load		11/13
	1	Iran	ng		<u>E</u> dit		
				· <del>?</del> ?	<u>D</u> elete		
				đ	<u>C</u> reate Ne	w 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		<u>=</u>	Description
$\rightarrow$	-	E101	- Trainin	ig Job KL	Sample Training Job
			Snapsh	ot Comment	🚊 🛛 Date Crea
	→ <ac Con + Training Jo</ac 			odated.com Load <u>E</u> dit Celet	20 I TN
				🖆 <u>C</u> reat	e New Job from Snapshot

#### 3. Click OK

8	Delete Job Snapshot									
Are you sure you want to delete this Job Snapshot?										
✓ <add< p=""></add<>	add 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 Executio	n Syste	m	Actio	ns
🖶 Print		ें, Load	👸 Create Job S	Snapshot		10	
🗟 Preview		े ट्र Edit	👬 Delete All Jol	Delete All Job Snapshots			
		💣 Delete				pand / lapse 🔻	Filter to with Sna
Pri	nt		Edit				View
Snap	shot R	egister O					

## **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**.

Code 📃			<u>=</u>	Description			Last Saved			sion	In Use
÷	-	E101	- Training Job KL	Sample Training Job	11/13/2019 8:25:3		19 8 <b>:25:</b> 3	19.2.0.27			
			Snapshot Comment	: <u>1</u>	Date Created			Version			
			<add com<="" td="" updated=""><td>ment here&gt;</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	0.00	Load	10 2 0 27			
	+	Train	ing Job	Training Job - Maricopa County No. TM292			-				
							<u>E</u> dit				
					്		<u> D</u> elete				
						Create New Job from Snapshot					

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.

	Estimate Quote	Price	Execution	System		e Actions			1.0.1				=	鱼	: 🖽 (
Print	🚯 New 📲 Copy	N		⇒ Indent	Link Field	Cost Item		Assembly	<u>⊉</u> ∞ Re		4	<b>T T</b>	CBS Tre		
Preview	🛞 Delete 🛛 📄 Paste	20	Split by Cost Type	Outdent	Unlink Field	🔚 Subordinate C	lost Item 🔁	Subordinate Ass	embly 22 Re	source Assembly	Expand /	Filter Clear	Expand	CBS Tree	
Export to Excel	Secure Hill Down	Ð	Toggle Suspended			Dependent Co	ost Item				Collapse *	* Filter			
Print		E	lit		Workbook			Insert				View			
ost Breakdown S	Structure (CBS) Register	0													
BS Tree (Filter I		16									1				
.85 Free (Filter I	Mode) ×	Dr	ag columns here to g	proup						Find: Searc	n Hor]	Saved view	s: Previous	view	
	escription		CBS Position Code	E. Descri	ption		Forecast (T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated	Allocation	Currency	Cost Adjustment	Optio Code
<b>1</b>		<b>A</b>	-	_			Quantity				_				
	ime Bond	-	-	JOB			20.00		\$292,094.58				U.S. Dollar		
	ice % Add-On		+		e Bond		1.00		\$46,950.91	\$46,950.91			U.S. Dollar		PRIM
	b Financing		+		% Add-On		1.00	Lump Sum	\$293,858.20	\$293,858.20			U.S. Dollar		PRIC
	direct Cost Escalation		+	Job F	inancing		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		FINA
	direct Cost Escalation		+	Indire	ect Cost Escalatio	n	1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		INDIF
	b Management & Equipment		+	Direc	t Cost Escalation		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		DIRE
	eneral Expense		+	Indire	ect Cost Add-On		1.00	Lump Sum	\$0.00	\$0.00			U.S. Dollar		INDIF
	rect Cost Add-On		+	Job M	lanagement & Eq	uipment	1.00	Lump Sum	\$157,096.28	\$157,096.28			U.S. Dollar		308 1
	oblization		+	Gene	ral Expense		1.00	Lump Sum	\$4,200.00	\$4,200.00			U.S. Dollar		GENE
	earing & Grubbing		+	Direc	t Cost Add-On		1.00	Lump Sum	\$104,301.10	\$104,301.10			U.S. Dollar		DIRE
	ndassified Excavation		+ 1	Mobil	lization		1.00	Lump Sum	\$11,909.51	\$11,909.51			U.S. Dollar	✓	6410
	ggregate Base		+ 2	Clear	ing & Grubbing		10.00	Acre	\$3,918.50	\$39,184.97			U.S. Dollar		2010
	sphalt Concrete Hot Mix Ty		<b>□</b> 3	Uncla	ssified Excavation	n	50,000.00	Cubic Yard	\$4.68	\$233,915.81			U.S. Dollar		202.0
	5 Inch RCP Culvert Class III		+ 3.1	Exc	avation		50,000.00	Cubic Yard	\$3.00	\$149,922.88			U.S. Dollar		3.1
	Inch PVC Force Main (SD		+ 3.2	Emb	ankment		50,000.00	Cubic Yard	\$1.68	\$83,992.94			U.S. Dollar		3.2
	Inch PVC Gravity Sewer (		<b>□</b> 4	Aggre	egate Base		45,000.00	Ton	\$15.40	\$592,928.99			U.S. Dollar		303 5
	Foot Diameter Manhole		+ 4.1	Furr	nish & Haul Base Mat	terial	45,000.00	Ton	\$11.54	\$519,513.30			U.S. Dollar		4.1
	ructural Excavation & Backfill		+ 4.2	Fine	egrade Subgrade		400,000.00	Square Yard	\$0.19	\$75,848.36			U.S. Dollar		4.2
	eel Reinforcement		-												

### **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
<b>□</b> 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
<b>3</b>	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
<b>5</b>	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
<b>6</b>	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**

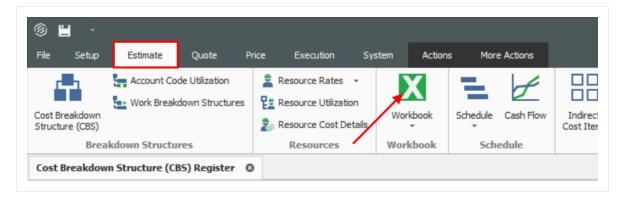
11.1 Linking to Excel	
11.1.1 InEight Estimate Workbook	
11.1.2 Linking to and from Excel	
11.1.3 Update Links	
11.2 Built-In Spreadsheet	
11.3 Currency in Job Tracking Excel Import	
Lesson 11 Review	194
Lesson 11 Summary	

### **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.

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+ × InEight × E ESTIMAT	E	provide a	quick ar	nd easy wa	y to perf	H fined Take O orm Take O ription of ea	ff for thing	s like pip				e.
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Instructions:						veen Excel a h links in l		ate, you c	an updat	æ all linked	fields by	
		requiremen	t to link t	to a cell is t	hat the co	ets into this well must be na	amed using	Excel's n	aming fun	ction (Insert	> Name).	
Table of Contents						t copied interary > Work			create,	open the M	aster	
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5												
Instructions eady	Table of Co	ntents A	_Haul Co:	st B_Ha	uler Calc	ulator C_	Haul Take	Off D	Productio	on Rate Calc	ulator	E

### **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:

	Α	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

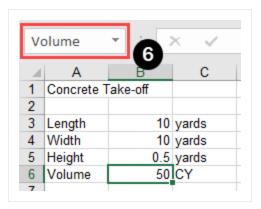
5. Create a new row to calculate the total cubic yards by factoring the length, width, and height quantities.

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

1	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	1	- Assembly	🇞 Resource				
	🖛 Outdent	🖧 Unlink Field	🔚 Subordina	ate Cost Item	🔁 Subordinate Assembly	Resource Assem				
Suspended			🕂 Depender	nt Cost Item						
		Workbook			Insert					

						1110
	Optional Code	Forecast (T/O) Quantity			Unit Cost	Total Cost (Forecast)
	06420	1.00	Lun	np Sum	\$2,100.00	\$2,100.00
	08210	1.00	Lun	np Sum	\$1,000.00	\$1,000.00
	09640	1.00				
	12510	1.00	Ľ	<u>O</u> pen		
	15300	1.00	Ð	<u>N</u> ew		
	16510	1.00	$\otimes$	<u>D</u> elete		
	1500 0 100	1,000.00	Measure         Unit Cost         (Fi           1.00         Lump Sum         \$2,100.00         (Fi           1.00         Lump Sum         \$1,000.00         (Fi           1.00         Lump Sum         \$1,000.00         (Fi           1.00         Lump Sum         \$1,800.00         (Fi           1.00         Imp Sum         \$1,800.00         (Fi			
	1500 0200	200.00	٦	Cop <u>y</u>		
	1600 0230	1,000.00	Measure         Unit Cost           1.00         Lump Sum         \$2,100.00           1.00         Lump Sum         \$1,000.00           1.00         Lump Sum         \$1,800.00           1.00         Qpen         \$1.800.00           1.00         Mew			
e	CO1	1.00	+	Fill Down		
	UNASSIGNED DIRECT C	1.00	Д.	Link this field to	Excel	
osts	UNASSIGNED	1.00				
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		1.00	D) Quantity     Measure     Unit Cost       1.00     Lump Sum     \$2,100.00       1.00     Lump Sum     \$1,000.00       1.00     Lump Sum     \$1,800.00       1.00     Imp Sum     Imp Sum       1.00     Imp Sum     Imp S			
the Water						
		1.00	-			
		1.00	7		_	
		1.00	긑	Insert Cost Item	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 Excel			×
When linking to Excel you ca Excel update an Estimate fie Estimate update a named ce	ld or have the		ta in
Update Estimate Field fr	rom Excel	¢٢	
O Update Excel Cell from E	stimate	63	
Field to Link: Forecast (T/	(0) Quantity		
O_Item2AreaSF_StructuralC O_Item3AreaSF_StructuralC O_Item3AreaSF_StructuralC O_Item4AreaSF_StructuralC O_Item4AreaSF_StructuralC O_Item5AreaSF_StructuralC O_Item5VoICY_StructuralCo O_TotAreaSF_StructuralCon O_TotAreaSF_StructuralCon O_TotAreaSF_StructuralCon O_TotAreaSF_StructuralCon	oncTakeOff ConcTakeOff ConcTakeOff ConcTakeOff ConcTakeOff ConcTakeOff oncTakeOff ncTakeOff		*
Prorate to Superior Item	Quantity		
Group Cell Names by Wo	orksheet		
C Auto-Refresh Cell Names	Pick fro	om Excel	
	ОК	Cance	el

- 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.

E	stimate	Quote	Price	Execution	Syste	٤m	Actio	ns Mor	e Actions		1
100		le Utilization lown Structures	맽	Resource Rates Resource Utilization Resource Cost Det	1	_	kbook	Schedule	Cash Flow	Indirect Cost Items	6 9
akdown Structures Resources wn Structure (CBS) Register				X €	Open	Job Workbo e Current Jo	ook ob From Wor	kbook	in		
e to gro	oup					1	Updat	e All Open .	lobs From W	orkbook	
de 🗎	Des	cription			Optio Code	Option 🏭 Update Workbook From Current Job Code				nt Job	t o as
	JOB	•				6	Updat	e Workbool	ks From All O	pen Jobs	
	Prir	ne Bond			PRIM	8	Delete	Broken Lin	ks in All Ope	n Jobs	ηp
	Pric	e % Add-On			PRIC	- % A	DD-ON	_		1.00 Lt	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.

	ration								
Vetwork Database	File	API	SAP	Support					
Attachment Setting	28								
Enable Linked (inked attach)	d Attachm ments are	ents Or not say	ily ved inside	Estimate jobs	i)				
C Enable Linker (job folder atta									
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Spreadsheet								~	1
		Built-in Spreadsheet  V Microsoft Excel						1	
Spreadsheet Ap	plication:							- 17	
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Spreadsheet Ap	plication:	Micro	soft Exce	sl.	-	-			
Spreadsheet Ap	plication:	Micro	soft Exce	sl.					
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Spreadsheet Ap	plication	Micro	soft Exce	sl.					

### 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		1
Job Tracking Column	Excel Column	
Note	None Selected	
- Currency		
Job Tracking Column	Excel Column	1
Currency	None Selected	1
<ul> <li>Expense Fields</li> </ul>		۲
Job Tracking Column	Excel Column	٦.
Resource	None Selected	
Description	None Selected	
Quantity	None Selected	
Unit of Measure	None Selected	
Tag 1	None Selected	
Tag 2	None Selected	
Tag 3	None Selected	
Note	None Selected	
Bilable	None Selected	P
Commitment	None Selected	
<ul> <li>Expense Costs</li> </ul>		١.

#### 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

### **Lesson Topics**

12.1 Primavera	
12.1.1 Scheduling Options	
12.1.2 Schedule Cost Items	
12.1.3 Update Primavera from InEight Estimate	
12.1.4 Update InEight Estimate from Primavera	
12.1.5 Manage Changes Between Estimate and Schedule	217
Exercise 12.1 – Manage Changes Between Estimate and Primavera	
12.2 Microsoft Project	
12.2.1 Set Up Scheduling Options	
12.2.2 Schedule Cost Items	
12.2.3 Update Microsoft Project from InEight Estimate	
12.2.4 Update InEight Estimate from Microsoft Project	
12.2.5 Export Copy of MS Project File	
12.2.6 Manage Changes Between Estimate and Schedule	

Lesson 12 Review	237
Lesson 12 Summary	237

### **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.

	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Fold	der Tags	Competitors	Pricing	Schedule	Cash Flow
integrated So	chedule:		Primavera	•	📃 Alwa	iys use Plug Day	s when up	odating Es	timate from the	e schedule		
Schedule Curr	rency:		U.S. Dollar	•								
Cost Item Ro	oll Up	Login Options	Mapping Options	Resources	Expense Co	osts Actuals	Tags	Activity	Calendars			
will be To forc button	recalculat e immedi or the 'Ca	ted when a chan ate recalculatior	is for scheduling ge is made to the n of Plug Days for ys' command o	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

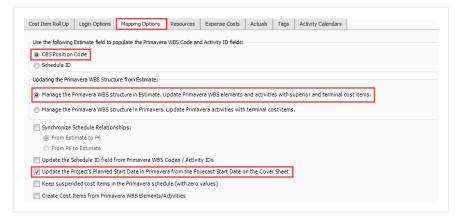
Iverview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule
ntegrated	Schedule:	[	Primavera	-	📄 Alwa	iys use Plug Day	s when updating E	stimate from the	e schedule	
ichedule (	Currency:	[	U.S. Dollar	-						
Cost Item	Roll Up	ogin Options.	Mapping Optic	ons Resources	Expense Co	osts Actuals	Tags Activity	Calendars		
Oset	hese login s:	ettings:		-Default-		•				
				pmdb admin		-				
			Password:	*************	*********					
🔘 Usep	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	<ul> <li>Provides options for sending InEight Estimate resources to Primavera.</li> <li>Typically, you would select the Update scheduled resources only option to send only resources that are employed on cost items</li> <li>The Update all of this job's resources option updates Primavera with all of the resources in your project's Resource Rate Register</li> </ul>
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 re	only		<ul> <li>Adjust B</li> <li>Maintain</li> <li>Update Prima</li> </ul>	udgeted Ur Budgeted I	iits to ma Units to r Accounts f	when using Plug Days: tch Plug Duration natch (non-plug) Work H rom Estimate Account Co unts on Resource Assign	odes:
Map Resource Types to Primaver	a: Resource		Update Price	/ Unit on Pr	imavera R	esource Assignments: —	
Labor: Construction Equipment:	Resource	•	Construct	tion Equipr	nent		
Rented Contruction Equipment:	Resource	•	🛛 🕡 Rented O	Contruction	Equipme	nt	
Installed Material:	Resource	•	🔽 Installed	Material			(5)
Installed Equipment:	Resource	•	🔽 Installed	Equipment	:		-
Supplies:	Resource	•	Supplies				
Unique:	Resource		Unique				

### 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	•	Always use Plug Days when upda			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 Equipment:			HD02 Owned Equ	HD02 Owned Equipment 👻							
		Rente	d Equipment:	HD03 Rented Eq	Equipment 👻							
			Supplies:	HD04 Supplies +			•					
			Materials:	HD05 Materials			•					
				HD06 Subcontract			•					
			Subcontract:	HD07 Fees			-					
			Fees:	HD08 Allowance	ance -							
			Allowance:	HD09 Custom Ca	ategory1 -							
		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**.

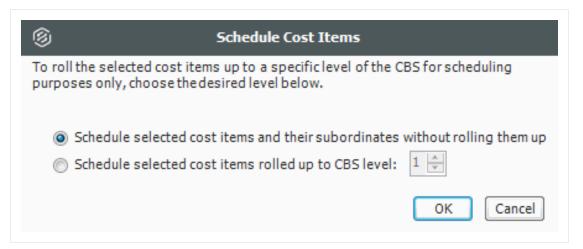
CBS Position Code  🗎	Description	Scheduled	Roll Up Schedule
	JOB	✓	
+	Prime Bond		
+	Price % Add-On		
+	Job Financing		
+	Indirect Cost Escalation		
+	Direct Cost Escalation		
+	Indirect Cost Add-On		
+	Job Management & Equipment		
+	General Expense		
+	Direct Cost Add-On		
+ 1	Mobilization	✓	
+ 2	Clearing & Grubbing	✓	
<b>□</b> 3	Unclassified Excavation	$\checkmark$	
+ 3.1	Excavation	<ul> <li>Image: A start of the start of</li></ul>	
+ 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
	<b>■</b> 4.3	Install Aggregate Base		Insert Subordinate	D.0000019
	+ 4.3.1	Place Aggregate Base		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
	<b>7</b>	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	$\checkmark$	
<b>□</b> 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	✓	
<b>□</b> 4.3	Install Aggregate Base	✓	
+ 4.3.1	Place Aggregate Base	✓	
+ 4.3.2	Blue Top Aggregate Base	$\checkmark$	

### **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.

I -				Trai	ning Job - Est	imate
File Setup Estimat	e Quote	Price E	ecution	System I	ntegrations	Actions
Cost Breakdown Structure (CBS)	• X Workbook	Schedule	Cash Flow		Price Breat	
Breakdown Struc Re				a from Estimate		ad and Pr
	e (CDS) Register	🗳 🚰 Upo	date Estimate	from Primavera		
Drag columns here to group						Find: [Se
CBS Position Code	Description			Scheduled	Roll Up Schedule	WBS Element
+ 1	Mobilization			✓		
+ 2	<b>Clearing &amp; Grubb</b>	ing		$\checkmark$		
□ 3	Unclassified Exca	vation		$\checkmark$	$\checkmark$	
+ 3.1	Excavation					
+ 3.2	Embankment					
□ 4	Aggregate Base			✓		$\checkmark$
+ 4.1	Furnish & Haul Ba	ase Material		$\checkmark$		
+ 4.2	Finegrade Subgra	ade		$\checkmark$		
<b>■</b> 4.3	Install Aggregate	Base		✓		$\checkmark$

- 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**.

9	Update Primavera From Estimate
	o update in the linked Primavera schedule. Data will be updated chedule options specified in Job Properties.
<b>WBS / Activit</b>	ies (always updated)
Resources	
<b>Expenses</b>	
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.

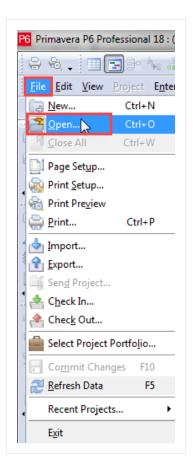
Attention	
	iges that have not been saved. Only to Primavera. Would you like to save the era?
Never ask me this quest	tion again
	Yes No

• 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	
<b></b>	••• (	<b>i</b>
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.

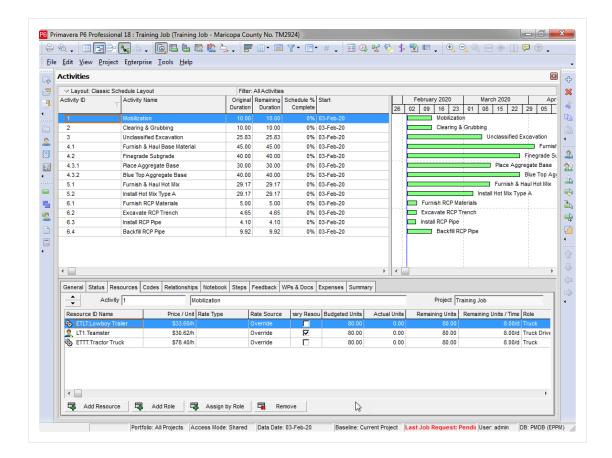
Layout: Projects			
Project ID	Is BID*BUILD Job	Project Name	Total Activities
🖬 🐟 EPS		Enterprise	0
🛨 🔈 BID*BUILD		BID*BUILD	0

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			<ul> <li>Image: A start of the start of</li></ul>	<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	<b>?</b>	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 Count	Activ		
📄 Training Job	Yes	Training Job - Maricopa Count	Activ		
< 📃			4		
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:

Update InEight Estimate 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

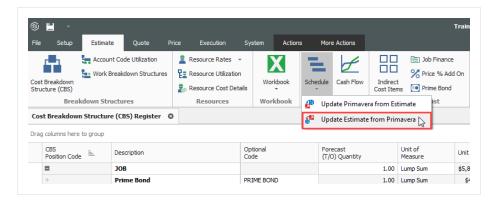
- 1. Open your version of the **Training Job** project in Primavera.
  - In the real world, it is likely that you would have overlapping activities, or your activities would occur out of order, however for this example you will link all activities from finish to start
- 2. Highlight all of your activities 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										
✓ Layout: Clas	sic Schedule Layout	Filter: /	AllActivities	\$						
Activity ID	√ Activity Name	Original Duration	Remaining Duration	Schedule % Complete	Start	26	Februa 02 09	ary 2020 16 23	March 2020 01 08 15 22	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	0%	03-Feb-20				Unclassified	Excavation
4.1	Furnish & Haul Base Material	45.00	45.00	0%	03-Feb-20				1	Furni
4.2	Finegrade Subgrade	40.00	40.00	0%	03-Feb-20				1	Finegrade
4.3.1	Place Aggregate Base	30.00	30.00	0%	03-Feb-20				Place Ag	gregate Base
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	03-Feb-20					Blue Top A
5.1	Furnish & Haul Hot Mix	29.17	29.17	0%	03-Feb-20				Furnish 8	k Haul Hot Mix
5.2	Install Hot Mix Type A	29.17	29.17	0%	03-Feb-20				Install Hot Mix T	ype A
6.1	Furnish RCP Materials	5.00	5.00	0%	03-Feb-20		🔲 Fur	nish RCP Mat	erials	
6.2	Excavate RCP Trench	4.65	4.65	0%	03-Feb-20		Exc	avate RCP T	ench	
6.3	Install RCP Pipe			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
	JOB	2/3/2020	2/23/2021	2/3/2020	2/23/2021	2/3/2020	2/23/2021
+	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	2/14/202
+ 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	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
<b>□</b> 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
<b>6</b>	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
	o update in the linked Primavera schedule. Data will be updated chedule options specified in Job Properties.
WBS / Activit	ies (always updated)
Resources	
<b>Expenses</b>	
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 Primaver	a Integration Server	
	•••	<b>S</b>
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

																	E
Projects Activiti	es																
✓ Layout: Classic Scl	hedule Layout	Filter:	AllActivitie	s													
Activity ID	Activity Name	Original Duration	Remaining Duration	Schedule % Complete		orua 09	ry 20	_	0		_	202	0 22	29	A 05	pril 20 12	_
1	Mobilization	10.00	10.00	0%	03-Feb-20		Mot	oilizatio	n						-		_
2	Clearing & Grubbing	10.00	10.00	0%	17-Feb-20		-		CI	earing	& G	Grubb	ing				
3.1	Excavation	15.63	15.63	0%	02-Mar-20			[	+				Б	cava	tion		
3.2	Embankment	20.83	20.83	0%	23-Mar-20							L.	•				
4.1	Furnish & Haul Base Material	45.00	45.00	0%	21-Apr-20											L	٠
4.2	Finegrade Subgrade	40.00	40.00	0%	23-Jun-20												
4.3.1	Place Aggregate Base	30.00	30.00	0%	18-Aug-20												
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	29-Sep-20												
5.1	Furnish & Haul Hot Mix	20.83	20.83	0%	24-Nov-20												
5.2	Install Hot Mix Type A	20.83	20.83	0%	23-Dec-20												
6.1	Furnish RCP Materials	5.00	5.00	0%	15-Jan-21												
6.2	Excavate RCP Trench	7.00	7.00	0%	22-Jan-21												
6.3	Install RCP Pipe	4.10	4.10	0%	02-Feb-21												
6.4	Backfill RCP Pipe	9.92	9.92	0%	08-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
<b>□</b> 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
<b>6</b>	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.

tivity 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
<b>6</b>	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	✓	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
integrated	Schedule:	[	Microsoft Proje	ct -	📄 Alwa	ays use Plug Day	s when updating Es	timate from the	schedule			
Schedule C	Currency:	[	U.S. Dollar	•								
Cost Item	Roll Up											
			-	p cost items for se	neduling purp	poses						
() L	ongest sche	duled days amo	ing all rolled up	costitems								
<b>T</b>	lotal schedul	ed days for all i	olled up cost it	ems								
Note	e: When rolli	na up cost item	s for scheduling	purposes, the Pl	un Days of the	e superior cost it	em					
				purposes, the Plate ne scheduled days			em					
will b	be recalculat	ed when a chan	ge is made to th	ne scheduled days	of a subordi	inate.						
will b	be recalculat orce immedia	ed when a chang te recalculation	ge is made to the of Plug Days fo		of a subordi ems, use the	inate. 'Recalculate Plug						
will b To fo butto	be 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	inate. '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

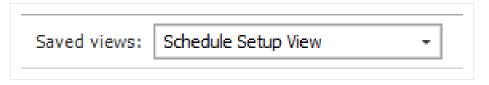
In the below example, notice that all of the cost items are scheduled, but the subordinates for Unclassified Excavation will be rolled up to the superior level.

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	$\checkmark$	
+ 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	✓	
+ 4.2	Finegrade Subgrade	✓	
<b>4</b> .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
3	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	✓	
+ 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**.

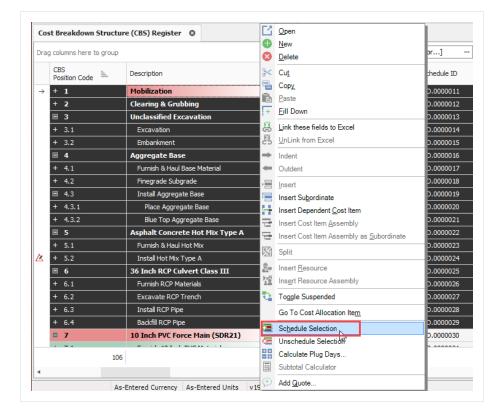
# Step by Step — Schedule a Group of Cost Items in InEight Estimate

- 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.

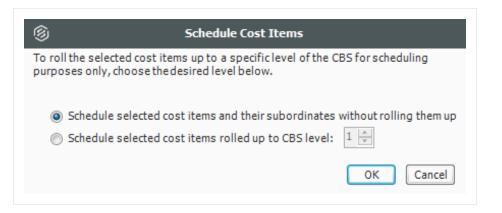
TIP

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	$\checkmark$	
<b>3</b>	Unclassified Excavation	$\checkmark$	$\checkmark$
+ 3.1	Excavation		
+ 3.2	Embankment		
□ 4	Aggregate Base	$\checkmark$	
+ 4.1	Furnish & Haul Base Material	✓	
+ 4.2	Finegrade Subgrade	✓	
<b>■</b> 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.

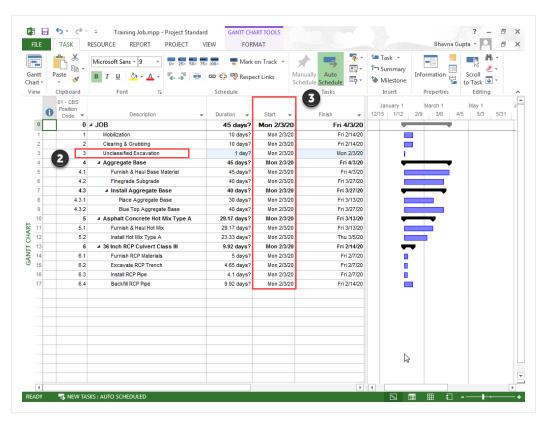
# Step by Step — Update MS Project from InEight Estimate

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	
	st Breakdown Structure (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		Expo (1)0) Quant		of MS Project I Measure	ile t	Total Cost (Forecast)	Subject Cost
÷	•	JOB					20.00	Mile	\$294,138.13	\$5,882,762.51	
	+	Prime Bond		PRIME BOND			1.00	ump Sum	\$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 EXPENS	E		1.00	ump 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 Esca		Direct Cost Escalation	on	DIRECT COST ESC	CALATION		1.00	ump Sum	\$15,048.80	\$15,048.80	
	+ Indirect Cost Add-On					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
	<b>□</b> 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

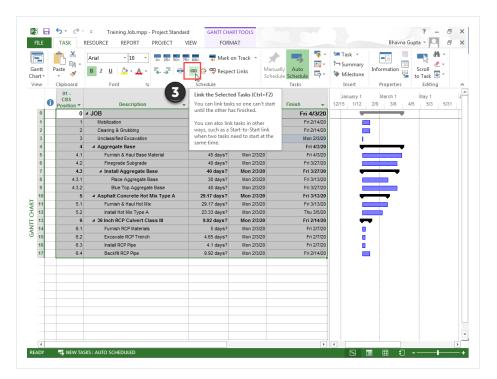
You can also bring information back from Microsoft Project into InEight Estimate. When you update InEight Estimate from Microsoft Project, the following information updates:

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 Telescoloritation Display
	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		of MS Project	File	Total Co (Foreca		Subject	Cost
÷		ЈОВ						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	E		1.00 1	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
<b>4</b> .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
<b>5</b>	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
<b>6</b>	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				
	Acco	unt Code Utilization	📛 😫 Reso	urce Utilization	X	-	6		i 🖻	lob Finar	nce 🗾	nire
		k Breakdown Structures		urce Cost Details				. 🗆	%⊦	rice % /		强 Indi
	t Breakdown Jcture (CBS)		Resources	urce Employments	Workbook *	Schedule	Cash Flo	ow Indirect Cost Item	s 💽 P	rime Bor	nd Structur	
	Breakdown S	tructures	Resour	ces	Workbook	💽 Op	en MS Pro	oject		Cost		Overhead and Pr
0	st Breakdown Structu	ure (CBS) Register 🛛 🖗				🖉 Upr	date Estin	- nate from Proje	ect			
rag	g columns here to group							ect from Estima				
	CBS Position Code 🚞	Description		Optional Code		Exp		of MS Project	File		Total Cost (Forecast)	Subject Cost
<i>→</i>	=	JOB					20.00	Mile	\$294,	138.13	\$5,882,762.51	
	+	Prime Bond		PRIME BOND			1.00	Lump Sum	\$47,	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			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
	<b>□</b> 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
<b>6</b>	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
	ged the quantity for a cost item that already contains costs. e the TOTAL cost to change or the UNIT cost?
Change TOT Change UNI	
Deactivate t and ALWAY	this confirmation for quantity changes FOR ALL JOBS 'S change the TOTAL cost
	this confirmation, choose Tools > Activate Unit/Total or Quantity Changes.
	ОК

- 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
<b>■</b> 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
<b>5</b>	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
<b>6</b>	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

13.1 Cash Flow	.240
13.2 Cash Flow Options	241
13.3 Cash Flow Display Settings	245
13.3.1	.245
13.3.2 Cost Items and Cost Categories	245
13.3.3 Resource Utilization	250
Lesson 13 Review	254
Lesson 13 Summary	254

# 13.1 CASH FLOW

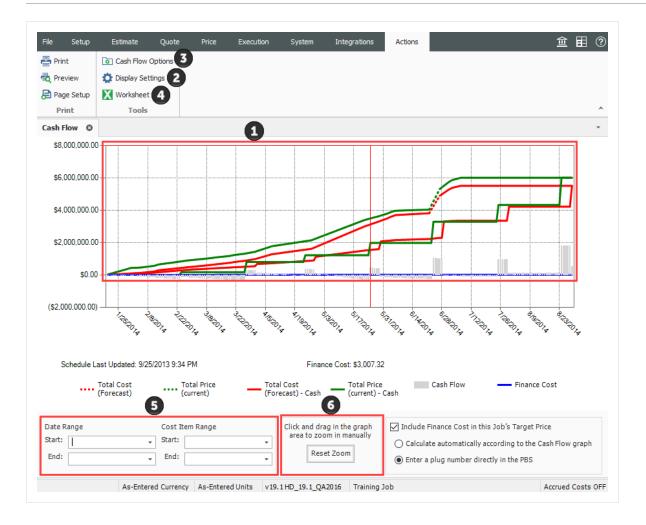
The Cash Flow form provides a graphical representation of the cash flow and resource utilization of your project, so you can quickly assess financing and resource needs.

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	<ul> <li>The graph displays the projected cash flow of your project, along with job financing expense, individual cost category costs and resource utilization.</li> <li>The x-axis measures time</li> <li>The left y-axis measures amounts</li> <li>The right y-axis measures quantities (when resource utilization is displayed)</li> <li>All graphs depicted on the Cash Flow form can be displayed based on Pay Quantity or Forecast (T/O) Quantity</li> </ul>
2	<ul> <li>Click on the <b>Display Settings</b> icon to indicate what to display on the graph.</li> <li>You can display total costs and price or specific cost categories</li> <li>You can also set the display settings to report on Resource Utilization</li> </ul>
3	Click on the <b>Cash Flow Options</b> icon to specify revenue timing, cost timing, and cost of money.
4	Click the <b>Excel</b> 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 <b>Reset Zoom</b> 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 fror	m billing to collect	tion:	25 d	lays		
<ul> <li>At the end of the job</li> </ul>	,	Amount of each billing	6						
• Every month on this day 10	1	Retainage is released: <ul> <li>At the end of the job</li> </ul>							
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
<ul> <li>At the end of the job</li> <li>Every month on this day 25</li> </ul>	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	<ul> <li>Under the Cost Items section, you can select:</li> <li>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</li> <li>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</li> <li>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</li> <li>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</li> <li>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</li> <li>Finance Cost: Displays the Cost of Money amount calculated from the settings you specify in the Cash Flow Options</li> </ul>
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:	-1	Estimated	As-Built	Planned To Date	Resource Utilization				
	Labor				Summarize resources by:	Resource	е Туре		$\sim$
2	Owned Equipment						utilized re / resource		
eriod Day $\checkmark$	Rented Equipment				Value	Qty	Cost	AB Qty	AB Cost
Cost Items	Supplies								
Total Cost (Forecast)	Materials				Construction Equipment Rented Construction Eq				
Total Price	Subcontract				Installed Equipment				
Total Cost (Forecast) - Cash	Fees				Supply Unique				
Total Price (current) - Cash	Allowance								
Cash Flow	Custom Category1								
Finance Cost	Undefined				Quantity:	Cos	t		
As-Built	L	4			None ~ As-Built Quantity:	Nor	e Built Cost:	$\sim$	
CE-Total Cost Earned (to-date)					As-Built Quantity:	Non		$\sim$	

# 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

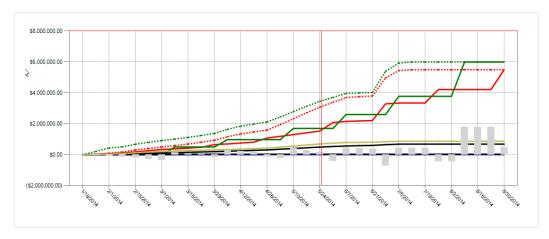
• Finance Cost

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>e.</i>	572
		Thurs	day, D	)ecemb	oer 27,	2018			4112014
	-		Febr	ruary 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:	2/3/201	4		Ŧ	Start:				-
End:				-	End:				-

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 utiliz 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 Dump Truck Excavator 225			
Total Price	Subcontract				Excavator 245			
Total Cost (Forecast) - Cash	Fees				Feeder Controls			$\equiv$
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		
Summarize resources by:	Description ~	
	This job's utilized resources All Library resources	

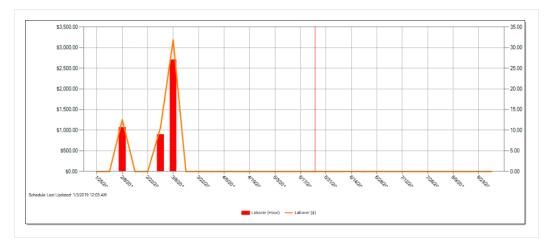
- 6. From the resulting list of Values, select **Laborer**.
- 7. Click in the **Qty** field for the selected value and select a color of your choice.
  - In this case the Qty represents the work hours for your Laborer resource
- 8. Click in the **Cost** field for the selected value and select a different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

Get data from:	<ul> <li>This job's utilized resources</li> <li>All Library resources</li> </ul>						
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		~	

- 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**

14.1 Haul Calculator	256
14.2 Trench Calculator	260
14.2.1 Trench Calculator - Trench Tab	261
14.2.2 Trench Calculator - Pipe Tab	
14.2.3 Trench Calculator - Beddings Tab	265
Exercise 14.1 – Trench Calculator	268
14.3 In-Field Calculator	271
Lesson 14 Review	273
Lesson 14 Summary	273

# 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.

C <u>o</u> st	Item Summary	🥏 <u>D</u> etail :	\$11.54	<b>₽</b> Plu <u>a</u> : \$0	.00	Quote : \$0.00
Drag o	columns here to g	roup				
	Row Number 📒	Code	Resource	e Assembly	De	scription
	+ 1	LT1			Те	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>					
Ð	<u>P</u> aste					
+	Fill Down					
A	Link this field to	Excel				
	UnLink from Ex	cel				
2.	Insert <u>R</u> esource	•				
12	Insert Resource	e <u>A</u> ssembly				
<b>.</b>	Open <u>H</u> aul Calo	ulator				
<b>#</b> .	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

<ul> <li>Calculate quantity of ETDT required to</li> </ul>	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 <b>V</b> Plug : \$0.0	0 Quote : \$0.00	Allocation	Production				×
Drag	columns <b>Firede</b>	[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
		Trench depth: Hinge elevation: Backslope: Material swell/shrinkage		10.0	feet	
				5.0	feet	
				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:

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:       1,100.00       LF         Use Total Pipe To Purchase as the quantity on this resource (on this cost item):       MPP24       #

- 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:
	Conversion factor (TON per CY): 1.60
	Results
	Lift Volume: 77.78 CY
人物化出来 斯内尔克莱 斯尔文法英	Use Lift Volume as the quantity on this resource (on this cost item):
The second s	Lift Weight: 124.44 Tons
the same in the training in the	
	Use Lift Weight as the quantity on this resource (on this cost item):
S to F	
Save Configuration to Library Load Configuration from Lib	

#### 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

Cos	t Breakdown	Str	ructure (CB	5) Register	Cost I	em Record 🛛											*
CBS	Code:	Ор	tional Code:	Descriptio	1:					Foreca	st (T/0) Qty:	Unit of Measure	:	Unit Cost:	Total Cost:	Currency:	
													~				
													~				
	26	Г		Undergrou	nd Pipe						1,640.00	LF	•	\$34.59	\$56,734.45	U.S. Dollar	
PI A	ssignment:	PI	Line Number	: PI Descript	ion:							Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
	~											Job Overhead	*	1,640.00	Detail +	BASE	
		_	•														
Cos	st Item Summar	ſŸ	<u>⊉ D</u> etail :	\$34.59	Plug: \$0.00	Quote : \$0.00	Allocation	n					Pro	oduction			×
Drag	g columns here	to g	roup		Fi	nd: [Search For]	9	Saved vi	ews: P	Previous	View	-				Qty Driven Hourly	
	Row Number 🗎		Code	Resource Asse	mbly [	escription	Quantity (Less Waste	:)	Waste 9 Add-on	%	Quantity	Unit of Measure		Durati	on Driven Resources	Resources	
	+	1	MPR36		F	ipe RCP 36 In	1,0	00.00		0.00	1,000.00	Linear Feet		D	avs: 0.00	0.00	
	+	2	MASAND		5	and	1	101.11		0.00	101.11	Ton			ifts: 0.00	0.00	
÷	+	3	MAFA		F	ine Aggregate	3	384.13		0.00	384.13	Ton			urs: 0.00 <	0.00	
	+	4	MACA1		(	Coarse Aggregate	2,1	153.15		0.00	2,153.15	Ton					
*														Man-Ho		0.00	
														Equip-Ho	urs: 0.00	0.00	
														LF/0	Day: 0.00	0.00	
													4				۲
•												+	Ż		b. <b>8</b> . ≱.	<b>≞</b> e <b>≜</b> e	$\approx$
-													-	OK Ca	ncel < Prev	Next >	_

# 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.

	12,1,0,0	Sulp Wall	21,000,00	aquarencee
	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	2500	Square Feet
+	13.4	Apply Primer	25,000.00	Square Feet
+	13.5	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