

ESTIMATE TRAINING MANUAL



Release 21.10
Last Updated: 19 August 2025

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LIST OF STEP BY STEPS

LESSON 2 - NAVIGATION	7
Step by Step – Launch InEight Estimate via on-premise	7
Step by Step – Archive and Restore a Job	8
Step by Step – Open a Job Folder	9
Step by Step – Open Forms	10
Step by Step – Move Columns	13
Step by Step – Sort Columns	16
Step by Step – Filter Columns	17
Step by Step – Filter Editor	19
Step by Step – Group Columns	20
Step by Step – Create a Saved View	21
LESSON 3 - LIBRARY SETUP	23
Step by Step – Create a Labor Resource	23
Step by Step – Create a Rental Equipment Resource	26
Step by Step – Non-Hourly Rate Calculator	27
Step by Step – Create an Installed Material Resource	28
Step by Step – Create a Resource Assembly	29
LESSON 4 - PROJECT SETUP	31
Create a new job from scratch	31
Step by Step – Set Up Job Level Security	32
Step by Step – Shift Rate Calculator	33
Step by Step – Import Filtered Resources	35
Step by Step – Enter Fuel Costs	36
Step by Step – Create a Pay Item	37
LESSON 5 - DIRECT COSTS	39
Step by Step – Adjust take-off quantities	39
Step by Step – Create a subordinate cost item	40
Step by Step – Define a plugged cost	41
Step by Step – Add cost detail	42
Step by Step – Define cost detail by adding an assembly	43
Step by Step – Adjust shift arrangements	44
Step by Step – Suspend a Cost Item	46
Step by Step – Unsuspend a Cost Item	47

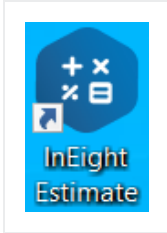
LESSON 6 - INDIRECT COSTS	49
Step by Step – Add job management & equipment costs	49
Step by Step – Add general expense costs	50
Step by Step – Delete existing default dependent cost items	51
Step by Step – Define prime bond	52
Step by Step – Define a price % add-on	53
Step by Step – Define a direct cost add-on	55
Step by Step – Add user-defined indirect cost items	57
LESSON 7 - FINALIZE ESTIMATE	59
Step by Step – Add profit as a percentage of target price	59
Step by Step – Modify the direct cost markup record	60
Step by Step – Define pricing manually	61
Step by Step – Use AutoPrice to balance and hit the target total	62
Step by Step – Unbalance hit target total	63
Step by Step – Lock Price	65
Step by Step – Make Last Minute Bid Adjustments	66
LESSON 8 - QUOTE MANAGEMENT	69
Step by Step – Create and publish an RFQ	69
Step by Step – Create a quote from RFQ	72
Step by Step – Enter quote details	73
Step by Step – Create a multi-packaged quote	74
Step by Step – Duplicate an existing quote	79
Step by Step – Add the Notes section to Quote Comparison & Award form	81
Step by Step – Compare and award quotes	83
Step by Step – Manage and award scope items	84
LESSON 9 - REPORTING	85
Step by Step – Getting to the Reports menu	85
Step by Step – Configure Report Output Settings (Report 1)	89
Step by Step – Configure Report Output Settings (Report 2)	95
Step by Step – Create a Register Report	100
LESSON 10 - DATA REPRODUCTION	105
Step by Step – Copy an Existing Job	105
Step by Step – Create a Template	107
Step by Step – Archive and Restore a Template	112
Step by Step – Use the Bid Wizard	113
Step by Step – Copy Estimate Data Using Edit Commands	121

Step by Step – Use the CBS Bid Wizard	125
Step by Step – Snapshot Register	128
Step by Step – Create a New Job Snapshot	130
Step by Step – Edit a Job Snapshot	133
Step by Step – Delete a Job Snapshot	134
Step by Step – Load a Job Snapshot	136
LESSON 11 - SPREADSHEET INTEGRATION	139
Step by Step – Export Data to an Excel Workbook	139
Step by Step – Cell Select	141
Step by Step – Link Estimate to the job's workbook	144
LESSON 12 - SCHEDULE INTEGRATION	147
Step by Step – Login Options Tab	147
Step by Step – Schedule a Cost Item in InEight Estimate	148
Step by Step – Schedule a Group of Cost Items in InEight Estimate	149
Step by Step – Roll Up Schedule	151
Step by Step – Update Primavera from InEight Estimate	152
Step by Step – Update InEight Estimate from Primavera	159
Step by Step – Schedule Plug Days	162
Step by Step – Update Primavera with InEight Estimate Changes	163
Step by Step – Schedule a Cost Item in InEight Estimate	167
Step by Step – Schedule a Group of Cost Items in InEight Estimate	168
Step by Step – Roll Up Schedule	170
Step by Step – Update MS Project from InEight Estimate	171
Step by Step – Update InEight Estimate from MS Project	173
Step by Step – Schedule Plug Days	175
Step by Step – Update MS Project with InEight Estimate Changes	176
LESSON 12 - CASH FLOW	179
Step by Step – Cash Flow Options Setup	179
Step by Step – Cash Flow Display Settings Set Up	181
Step by Step – Resource Utilization Display Setup	186
LESSON 13 - HAUL CALCULATOR	189
Step by Step – Haul Calculator - Calculate Quantity of Trucks	189
Step by Step – Haul Calculator - Calculate Total Duration	193
Step by Step – Trench Calculator - Trench	194
Step by Step – Trench Calculator - Pipe	196
Step by Step – Trench Calculator - Beddings	198
Step by Step – In-Field Calculator	200

LESSON 2 - NAVIGATION

STEP BY STEP – LAUNCH INEIGHT ESTIMATE VIA ON-PREMISE

1. From the Windows desktop, locate the **InEight Estimate shortcut** icon.



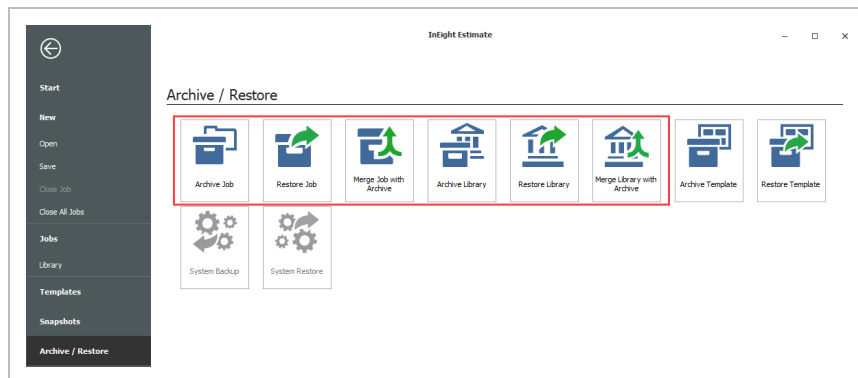
2. Double click on the icon, or right click and select Open.

TIP

If you cannot find the InEight Estimate shortcut icon, you can also launch InEight Estimate from the Windows Start menu.

STEP BY STEP – ARCHIVE AND RESTORE A JOB

1. Click **File** to open the Backstage View.
2. Select **Archive / Restore**.
 - Several options appear for archiving and restoring your jobs and library



3. Select **Archive Job**.
 - The Job Register appears
4. Select the **Training Job**, 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. To restore the job, select **Restore Job Archive** from the Archive / Restore page of the Backstage View.
8. Browse to the archived job and select it.
9. Click **Open**.
 - If the job 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 Job Code

STEP BY STEP – OPEN A JOB FOLDER

1. From the Backstage view, under the **Open a recent Job** section, double click on your **job**.
2. The job folder opens by default to the Cost Breakdown Structure Register.

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency	Optional Code
	JOB	1.00	Lump Sum	\$5,861,800.79	\$5,861,800.79	U.S. Dollar	
+	Prime Bond	1.00	Lump Sum	\$47,069.28	\$47,069.28	U.S. Dollar	PRIME BOND
+	Price % Add-On	1.00	Lump Sum	\$294,923.52	\$294,923.52	U.S. Dollar	PRICE % ADD-ON
+	Job Financing	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar	FINANCE EXPENSE

You can change the default form that opens when you start up a job. From the Backstage view, click on **Settings** to change the Job Startup > Start Page settings.

Settings

Options

- General
- Decimal Precision
- Fax Mail
- Account Code Settings
- Network
 - Deployment Mode
 - SQL Security
 - Security Roles
- Attachment Settings
- Timesheet Warehouse Settings
- Licenses
- Currency

General

☒ Prompt to Save Every 10 Minutes

☒ Live Register Scrolling

☒ Align and Match Columns

☐ Keep Employed Assemblies Collapsed

☒ Summarize Values in Group Row

Show up to 15 Detail Rows in Registers without Scrolling

Title Bars

☒ Show Job Code

☐ Show Job Description

☐ Show Job Code and Description

Language

Select a Language: English (United States)

Navigation

☒ Ribbon

☐ Classic

Navigation Bar

When a record form is closed, return focus to:

☒ The last form accessed

☐ The form that opened it

Job Startup

Start Page: Cost Breakdown Stru... (selected)

Cost Breakdown Structure (CBS) Register

Pay Item & Proposal Register

Quote Register

Quote Comparison & Award

Price Breakdown Structure

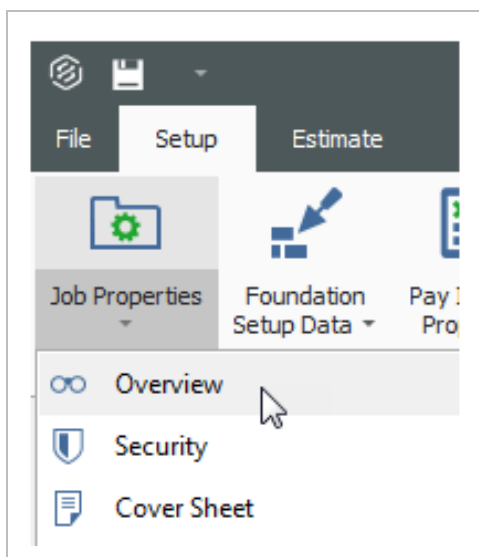
None

Restore Defaults...

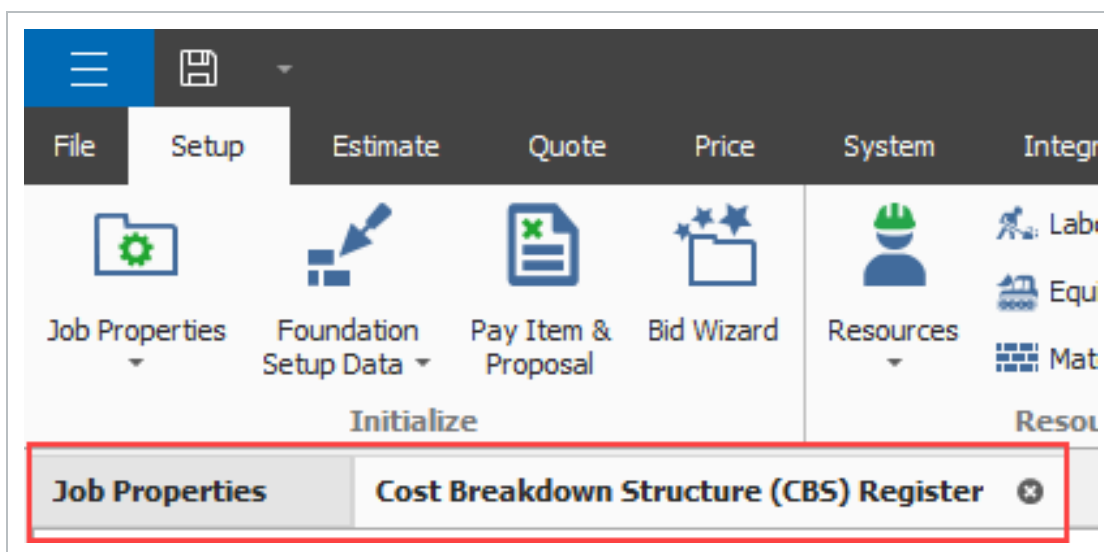
OK Cancel

STEP BY STEP – OPEN FORMS

1. Click on the **Setup** tab.
2. In the Initialize section of the Setup tab, click on the **drop-down menu** for Job Properties.
3. Select **Overview** to open the Job Properties form.

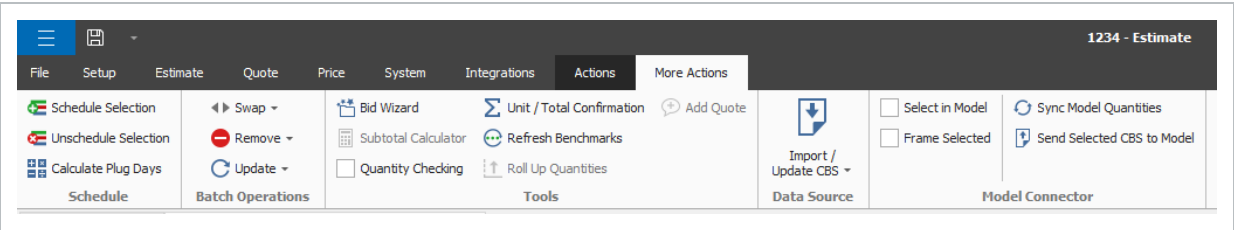
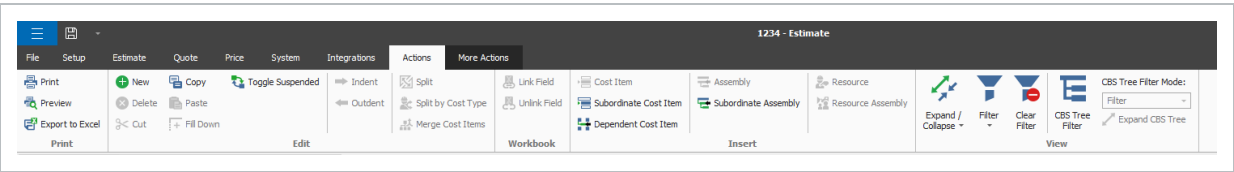


- Notice that each form opens in its own tab within the active job folder



- You can tab between these forms as you are working in InEight Estimate

- Once you are in a register, the Actions and More Actions tabs are available to you. The options available are contextual to that register



(missing or bad snippet)

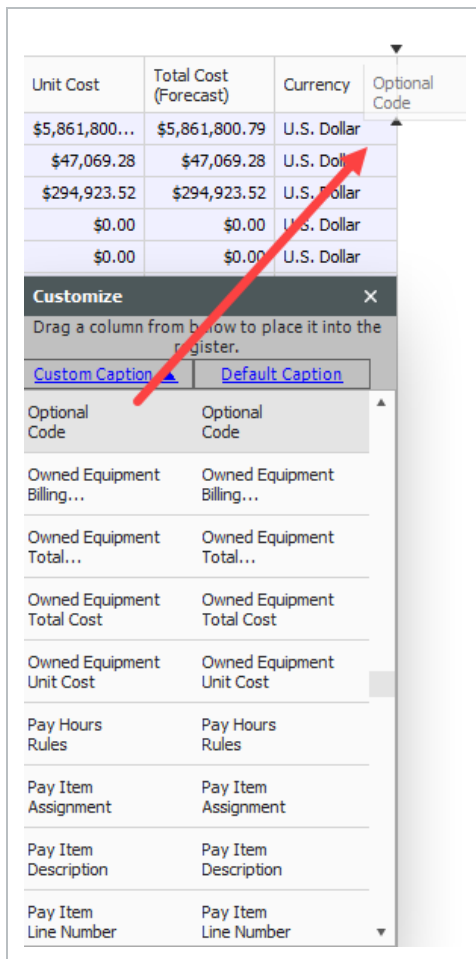
STEP BY STEP – MOVE COLUMNS

1. In the CBS, click on the **Currency** column header and drag the column to the left, dropping it to the right of the Description column.
2. Hide the **Optional Code** column by dragging the Optional Code column header down until a black X appears, then let go.

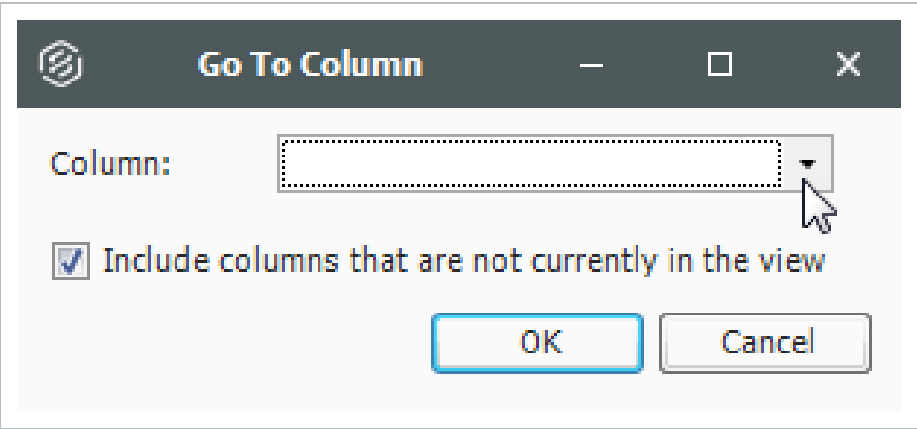


Currency	Optional Code
U.S. Dollar	
U.S. Dollar	PRIME BOND
U.S. Dollar	PRICE % ADD-ON
U.S. Dollar	FINANCE EXPENSE
U.S. Dollar	INDIRECT COST ES...
U.S. Dollar	DIRECT COST ESC...
U.S. Dollar	Optional Code INDIRECT COST A...
U.S. Dollar	JOB MANAGEMENT...
U.S. Dollar	GENERAL EXPENSE
U.S. Dollar	DIRECT COST ADD...
U.S. Dollar	641 0100
U.S. Dollar	201 0102
U.S. Dollar	202 0183
U.S. Dollar	3.1

- The Optional Code is now hidden from view
 - To unhide a column, right click on any column header and select **Column Chooser**; a Customization window appears, which contains all the hidden columns in that register
3. Find the **column** you want to unhide and drag-and-drop it to the location where you want it to go.



- You can also unhide a column using the Go To Column feature
4. Right click on a **column** header and select **Go To Column**.
 5. Click on the **drop-down menu** and select the column you want to unhide.



- 6. Click **OK**.

STEP BY STEP – SORT COLUMNS

You can sort on any column by clicking once on the column header.

1. In the CBS Register, click on the **Total Cost (Forecast)** column to sort the column in ascending order (e.g., 1 to 10, A to Z).
2. Click the **Total Cost (Forecast)** column a second time to sort in descending order (e.g., 10 to 1, Z to A).

TIP

Use Ctrl-click to unsort a column and reset it to its original state.

STEP BY STEP – FILTER COLUMNS

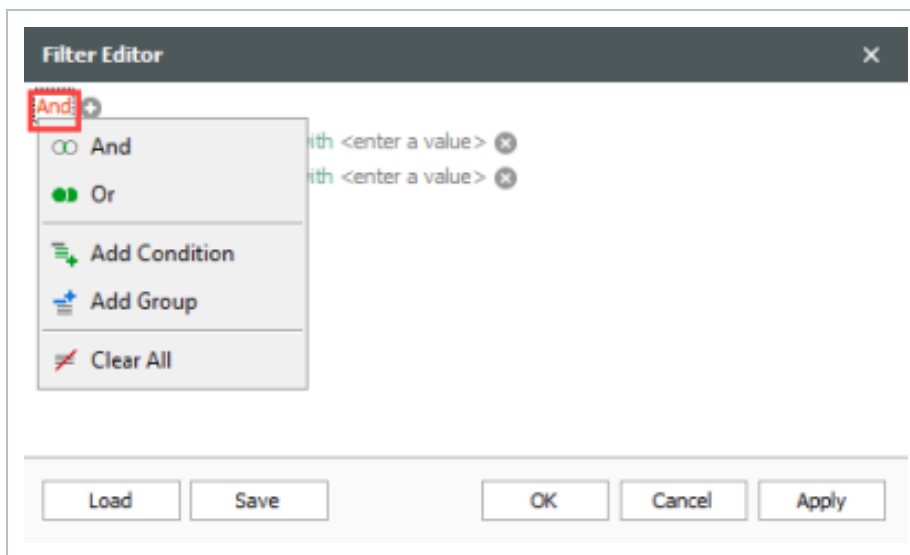
1. In the CBS, hover over the **Unit of Measure** column header for the filter icon to appear.
2. Click on the **filter** icon in the Unit of Measure column to select a filter value.
 - From the filter list, you can select any of the values defined for that column or you can use one of the predefined values (Custom, Blanks, Non blanks).

Unit of Measure 	Unit Cost	Total Cost (Forecast)														
Values Text Filters Enter text to search...  <table><tbody><tr><td>☒ (All)</td><td>☐ Month</td></tr><tr><td>☐ Acre</td><td>☐ Pound</td></tr><tr><td>☐ Cubic Yard</td><td>☒ Square Feet</td></tr><tr><td>☒ Each</td><td>☐ Square Yard</td></tr><tr><td>☐ Linear Feet</td><td>☐ Ton</td></tr><tr><td>☒ Lump Sum</td><td></td></tr><tr><td>☐ Mile</td><td></td></tr></tbody></table> Clear Filter Filter Editor Close			☒ (All)	☐ Month	☐ Acre	☐ Pound	☐ Cubic Yard	☒ Square Feet	☒ Each	☐ Square Yard	☐ Linear Feet	☐ Ton	☒ Lump Sum		☐ Mile	
☒ (All)	☐ Month															
☐ Acre	☐ Pound															
☐ Cubic Yard	☒ Square Feet															
☒ Each	☐ Square Yard															
☐ Linear Feet	☐ Ton															
☒ Lump Sum																
☐ Mile																

3. Make your selection, then click **Close**.
4. To clear the filter, click on the **red X** at the bottom of the form or click on the filter icon on the header of the column you filtered and select **(All)**, then click **OK**.

STEP BY STEP – FILTER EDITOR

1. In the CBS, hover over the **Unit of Measure** column header for the filter icon to appear.
2. Click the **Filter** icon in the Unit of Measure column to select a filter value; select the desired UoM.
3. Select the **Filter Editor** button, and the Filter Editor data box appears.
 - By default, an **And** statement is created with a **Begins with** operator and a blank value.
4. Select your preferred operator and enter in your preferred value.
5. To add additional **And/Or** statements, select the word **And** in the top left corner. A drop-down appears.



6. Choose which **And/Or** statement to add and then select the **Preferred Operator**.
7. Enter in your **Preferred Value** to complete your additional statement.
8. Click **OK**.
 - Select the **X** to delete a single statement.
9. Select the **And** statement in the top left corner to begin clearing all And/Or statements.
10. From the drop-down, select the option **Clear All**.
11. Once done, select **Apply** and then click **OK**.

STEP BY STEP – GROUP COLUMNS

1. From the CBS register, group the Unit of Measure column by dragging it into the grouping area (where it says “Drag columns here to group”).

Cost Breakdown Structure (CBS) Register

Drag columns here to group

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure
JOB		1.00	Lump Sum
+	Prime Bond	1.00	Lump Sum
+	Price % Add-On	1.00	Lump Sum
+	Job Financing	1.00	Lump Sum

- Notice that the cost items in the register are now grouped together by their units of measure, and each group of cost items is subtotalled by costs, hours, quantities, etc.

Cost Breakdown Structure (CBS) Register

Unit of Measure

Unit of Measure	CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity	Unit Cost	Total Cost (Forecast)
Acre	1			10.00		\$39,184.97
Cubic Yard	19			117,865.76		\$498,571.36
Each	29			59.00		\$1,684,854.23
LF	1			2,083.95		\$0.00
Linear Feet	11			30,248.00		\$459,303.91
Lump Sum	23			22.00		\$667,772.98
Mile	1			0.00		\$0.00
Month	2			2.00		\$10,000.00
Pound	3			60,000.00		\$44,408.30
Square Feet	9			136,300.00		\$276,594.95
Square Yard	2			800,000.00		\$99,954.78
Ton	8			160,000.00		\$2,034,391.05

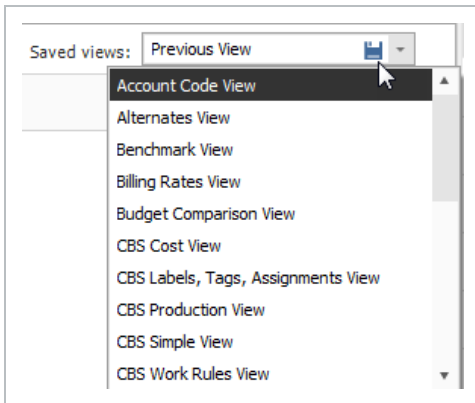
2. To ungroup, right click in the grouping area and select **Clear Grouping**
 - The column returns to its original location

TIP

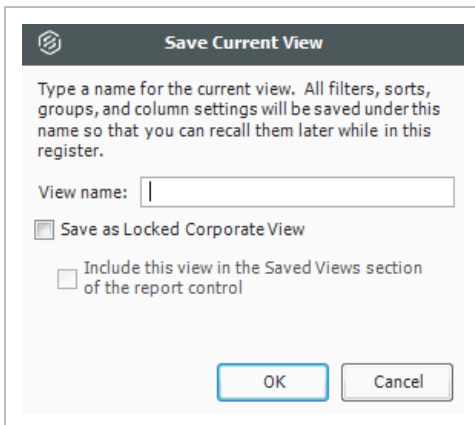
You can group by more than one column to have multiple grouping levels.

STEP BY STEP – CREATE A SAVED VIEW

1. In the CBS register, click on the **Saved Views** drop-down menu and the Save disc icon appears.



2. Click on the **Save disc** icon.
 - The Save Current View window appears



3. Enter the **View Name**, then select **OK**.
 - The new view displays in the drop-down menu

TIP

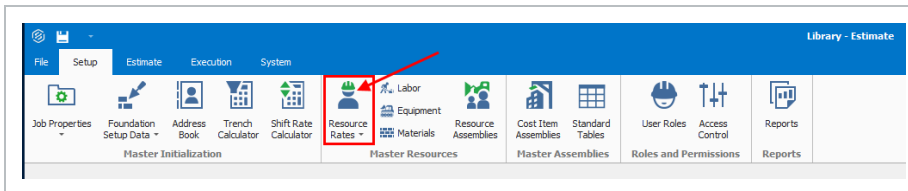
Saved views are user-specific; you will only see your own saved views when you are logged in.

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LESSON 3 - LIBRARY SETUP

STEP BY STEP – CREATE A LABOR RESOURCE

1. From the Library landing page, on the Setup tab, click on **Resource Rates** from the Master Resources section.



- The Library Resource Rate Register opens
2. Select the **Labor** tab.
 3. Right click on any row header and select **New**.
 - A new Labor Rate Record displays
 4. In the Code field, type **L + [your initials]**.
 5. Press the **Tab** key.
 6. Fill in the Description field.
 7. Click on the resource's **Setup** tab and select **Standard Labor Rate File** from the Resource File drop-down list.
 8. Select a **location** for the Geographic Area.
 9. Select **Wage Zone A** for Wage Zone.
 10. Select a **labor type** for the Organizational Category.
 11. For Tag 1, select a **code**.
 12. For Tag 2, select a **code**.
 13. On the Charge Rate tab, enter a **dollar value** for your Labor Base.
 14. Expand Labor Burden and under Labor Fringes, type in a **dollar value** for Pension and

Subsistence.

Resource Rate Register		Labor Rate Record	
Code: *	LMECHINEIGHT	Description:	Mechanic - Heavy Duty
Setup	Charge Rate	Billing Rate	
Scale 1	Scale 2	Scale 3	All Scales
Cost Category Breakdown	Amount	↔	Percent
▼ Total	\$57.00		
▼ Labor	\$57.00		
Labor Base	\$52.00		
▼ Labor Burden	\$5.00		
▼ Labor Fringes	\$5.00		
Travel	\$0.00	←	0.00
Premium	\$0.00	←	0.00
Holiday	\$0.00	←	0.00
Savings	\$0.00	←	0.00
Pension	\$3.00	←	5.77
Vacation	\$0.00	←	0.00
Subsistence	\$2.00	←	3.85
Health & Welfare	\$0.00	←	0.00

15. Define an overtime and double-time rate for the resource. Select the **checkbox** for Use Base Wage Factors for Scales 2 and 3.
16. Set the Scale 2 Factor to **1.50** x Base Wage and Scale 3 Factor to **2.00** x Base Wage.

Base Wage Factors for Overtime	
☒	Use Base Wage Factors for Scales 2 and 3
Scale 2 Factor:	1.50 x Base Wage
Scale 3 Factor:	2.00 x Base Wage
This option multiplies the Scale 1 base wage by the factors entered here to automatically calculate the base wage for Scales 2 and 3.	

17. Click **OK**, to close the record.

STEP BY STEP – CREATE A RENTAL EQUIPMENT RESOURCE

1. Open the Library Resource Rates Register.
2. Select the **Rented Construction Equipment** tab.
3. Right click on any row header and choose **New**; a new Installed Rented Equipment Rate Record displays.
4. In the Code field, type **RECR + [your initials]**, then press **Tab**.
5. In the Description field, type **Crane 110 Ton**.
6. Click on the resource's **Setup** tab and select **Standard Rental Rate File** from the Resource File drop-down list.
7. Select a **resource** from the Organizational Category drop-down list.

Code: * RECR110 Description: Crane 110 Ton

Setup  Charge Rate  Quote Billing Rate

Resource File: Standard Rental Rate File User Defined 1: ☐

Geographic Area: User Defined 2: ☐

Wage Zone: User Defined 3: ☐

Org. Category: Crane User Defined 4: ☐

Account Code: User Defined 5: ☐

Cost Driver: CT Duration User Defined 6: ☐

8. Move back to the Charge Rate tab to follow the step by step on the next page.

STEP BY STEP – NON-HOURLY RATE CALCULATOR

- 1. Refer back to your last entry's rate amount. Under Non-Hourly Period Charge Rates on the right, check the **Calculate Non-Hourly Period Charge Rates** checkbox.
- 2. On the resulting prompt, click **OK**.
- 3. In the Period field, select **Weekly**.
- 4. In the Amount Per Period field, type in a **number value**.
- 5. Type in a **number of hours** in the Hours Per Period field.

Non-Hourly Period Charge Rates

☒ Calculate Non-Hourly Period Charge Rates for RE Rental

Period:

Weekly

Amount Per Period:

\$4,000.00

Hours Per Period:

20.00

Code: *

RECR110

 Description:

Crane 110 Ton

Setup

 Charge Rate

 Quote

Billing Rate

Cost Category Breakdown		Amount
	Total	\$200.00
	Rented Equipment	\$200.00
	Fees	\$0.00
	Undefined	\$0.00

- 6. Click **OK** to close the record.

STEP BY STEP – CREATE AN INSTALLED MATERIAL RESOURCE

1. Select **Resource Rates** from the Library landing page.
 - The Resource Rate Register displays
2. Select the **Installed Material** tab.
3. Right click on any row header and select **New** from the drop-down menu.
 - A new Installed Material Rate Record displays
4. In the Code field, type **MGBP + [your initials]**, then press **Tab**.
5. In the Description field, type **Brick Pavers**.
6. Select a **unit of measure** from the Unit of Measure drop-down list.
7. On the resource's Setup tab, under Resource File select **Standard Material Rate File**.
8. On the Charge Rate tab, expand Materials and enter a **number value** in the Installed Materials Amount field.

Code: * MGBPPB Description: Brick Pavers

Setup
  Charge Rate
  Quote
 Billing Rate

Cost Category Breakdown	Amount
▼ Total	\$5.00
▼ Materials	5
Installed Materials	\$5.00
Undefined Materials	\$0.00
➤ Fees	\$0.00
Undefined	\$0.00

9. Click **OK** to finish adding this resource.

STEP BY STEP – CREATE A RESOURCE ASSEMBLY

1. From the Library landing page, under the Master Resources section of the Setup tab, select **Resource Assemblies**.
 - The Resource Assembly Register is shown.
2. Right click on any **row header** and select **New** from the drop-down menu.
 - A new Resource Assembly Record is shown.
3. In the Code field, type **CEXC + [your initials]** as the unique code for the assembly.
4. Add a **description** in the Description field.
5. In the Assembly Details register at the bottom of the screen, click in the **Resource Code** column in the first blank row, and then select the **Resource** icon that appears in the cell.
6. On the Labor tab of the resulting register, select the resource with the Description: **LL2Laborer** and click **OK** to add this resource to the assembly.
7. Add two additional resources.

TIP

You can use the Ctrl and Shift keys to select multiple resources at once.

8. Click **OK** to save and close the new assembly.

Resource Assembly Register					
Drag columns here to group					
	Code	Description	Resource File Description	Quantity	Unit of Measure
	+ CCONC	Concrete Crew	Standard Assembly...	1.00	Hour
→	+ CEXCPB	Excavation Assembly		1.00	Each
	+ CGRADE	Grading Crew	Standard Assembly...	1.00	Hour
	+ CMAINT	Equipment Maintenance	Standard Assembly...	1.00	Each

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LESSON 4 - PROJECT SETUP

CREATE A NEW JOB FROM SCRATCH

1. From the Backstage view, select to create a new job from **scratch**.
2. In the New Job dialog box, click in the **Core Project** field to select a Platform job from the list.
3. Modify the **Code** field as needed.
4. Enter a description of the job in the Description field.
5. Determine if you want to select the **Auto-Update Job in Connected Analytics** check box.
6. Click **OK** to create the new project.

STEP BY STEP – SET UP JOB LEVEL SECURITY

1. On the Job Properties > Security tab, select the **Restrict access to this Job...** check box.
 - Notice the checkbox to “Allow ALL users with Bid Wizard access to use this job as a source” is checked by default. Make sure to keep this checked as well
2. Click the **Add Users / Groups** button to add users.
3. In the Select Users or Groups dialog, type the **email addresses** for those that need access and then click **OK**.
 - If you don’t know the email address, you can type the name of the user, and click the Check Names box to find the appropriate user

The screenshot shows the 'Job Properties' window with the 'Security' tab selected. Under 'Estimate Protection', the 'Enable field level estimate protection' checkbox is unchecked. In the 'User Access' section, the 'Restrict access to this job to the following users' checkbox is checked (labeled 1). Below it, the 'Users allowed in this job' list contains one entry: 'User - Susan.Cappelloni@INEIGHT.COM' (labeled 3). To the right, the 'Allow ALL users with Bid Wizard access to use this job as a source' checkbox is checked. The 'Add Users / Groups...' button is highlighted (labeled 2). At the bottom right are 'OK' and 'Cancel' buttons.

- The job can now only be opened by those listed under Users allowed in this job

STEP BY STEP – SHIFT RATE CALCULATOR

1. On the Job Properties > Cost Basis tab, select the **Shift Rate Calculator** button.

The screenshot shows the 'Job Properties' window with the 'Cost Basis' tab selected. The 'Standard Wage Rate Composite' section contains three scale input fields: Scale 1 (100.00 %), Scale 2 (0.00 %), and Scale 3 (0.00 %). The 'Shift / Rate Calculator' button is highlighted with a red rectangle. Other sections include 'Standard Shift Arrangements' (Work Hours per Shift: 8.00, Pay Hours per Shift: 8.00, Shifts per Day: 1.00, Days per Week: 5.00), 'Rules' (Lock Cost Items to Pay Items: checked, Pay Item Unit Price Precision: 2, etc.), and 'Standard Rates' (Sales Tax Rate: 0.00 %).

2. For Shift 1, type a **number value** of hours in the **Monday through Friday Work Hours** fields.
 - You can enter up to three shifts for the project
3. For Shift 1, type a **number value** of hours in the **Scale 1** fields.
 - Scale 1 will be your regular time and Scale 2 will be any overtime

The screenshot shows the 'Shift / Rate Calculator Record - Training Job' window. It features a table for 'Shift 1' with columns for days of the week (Monday through Sunday) and a 'Totals' column. The table has rows for 'Work Hours', 'Scale 1', 'Scale 2', and 'Scale 3'. The 'Work Hours' row shows 10.00 hours for Monday through Friday and 0.00 for Saturday and Sunday, with a total of 50.00. The 'Scale 1' row shows 0.00 for all days, with a total of 0.00. The 'Scale 2' and 'Scale 3' rows also show 0.00 for all days, with totals of 0.00.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
Shift 1								
Work Hours	10.00	10.00	10.00	10.00	10.00	0.00	0.00	50.00
Scale 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

4. Enter a **number value** for hours in the **Scale 2** fields (just Monday through Friday).
5. For Shift 2, type a **number value** for hours as you did above in Step 3.
6. Click **OK**.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
Shift 2								
Work Hours	12.00	12.00	12.00	12.00	12.00	0.00	0.00	60.00
Scale 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

- Now you have a blended shift arrangement, and your labor rates are a blend of 64.18% straight-time and 35.82% overtime

Job Properties

Overview

Security

Cover Sheet

Cost Basis

Minority Setup

Fuel

Standard Shift Arrangements

Work Hours per Shift

11.17

Pay Hours per Shift:

11.17

Shifts per Day:

1.71

Days per Week:

7.00

Standard Wage Rate Composite

Scale 1:

64.18

%

Scale 2:

35.82

%

Scale 3:

0.00

%

Shift / Rate Calculator

STEP BY STEP – IMPORT FILTERED RESOURCES

1. In your Job, go to the Job Properties > Cost Basis tab, select the **Labor Rate** resource type.
2. Under Resource File Description, select **Standard Labor Rate File**.
3. In the Geographic Area, select an **Area**.
4. For Wage Zone (Work Center), select a **Wage Zone**.
5. For Organizational Category, select **All**.
6. Follow the same steps for the remaining resource types.
7. Select the **Import Filtered Resources** button to bring your selected resources into the job.
 - For this example, we'll select the following filters for the Labor resource type:

Resource / Assembly Filter				
Resource / Assembly Type	Resource / Assembly File ...	Geographic Area	Wage Zone	Organizational Category
☐ Labor Rate	☐ [All]	☐ [All]	☐ [All]	☒ [All]
☐ Construction Equipment R...	☐ [None]	☐ [None]	☐ [None]	☐ [None]
☐ Rented Construction Equi...	☐ [Non-Blanks]	☐ [Non-Blanks]	☐ [Non-Blanks]	☐ [Non-Blanks]
☐ Installed Material Rate	☒ Standard Labor Rate File	☒ Southwest	☒ Wage Zone A	☐ Truck Driver - Teamster
☐ Installed Equipment Rate			☐ Wage Zone B	☐ Supervision
☐ Supply Rate				☐ Carpenter
Initial Data				Initial Data

STEP BY STEP – ENTER FUEL COSTS

1. In your job, open the **Job Properties > Fuel Cost** tab.
2. In Cost Per UM column, enter a **dollar amount** into the following:
 - Diesel
 - Gas & Gasoline
 - Off Road Diesel

Job Properties ⓘ

Overview Security Cover Sheet Cost Basis Minority Setup Fuel Cost Job

Drag columns here to group

Fuel Type	Cost Per UM	Curre...	...	Account Code
Diesel	\$4.20	U.S. Dollar	Gallon	
Gas	\$3.90	U.S. Dollar	Gallon	
Gasoline	\$3.90	U.S. Dollar	Gallon	
Off Road Diesel	\$3.20	U.S. Dollar	Gallon	
→				

3. Currency should read U.S. Dollar and UM should read Gallon.

STEP BY STEP – CREATE A PAY ITEM

1. Open your job and select **Setup** tab >**Pay Item & Proposal** from the InEight Estimate landing page.
 - The Pay Item & Proposal Register displays
2. In the Pay Item Number column, in the first blank row, type a **number value**.
3. Use the Tab key to move to the Description column and type a **description**.
4. Leave the Pay Quantity at 1.00 and change the Unit of Measure to **LS (Lump Sum)**.
 - The Forecast (T/O) Quantity will auto populate to match your pay quantity, but can be changed later
 - You can tab to the next row to create additional pay items if needed

Drag columns here to group									
Find: [Search For...]									
Saved views: Simple View									
Pay Item Number	Lock Price	Row Number	Line Number	Description	Pay Quantity	Unit of Measure	Unit Price (current)	Total Price (current)	% Margin
+ 1000	☐		1 1	Mobilization	1.00	LS	\$0.00	\$0.00	0.00
→	☐								

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LESSON 5 - DIRECT COSTS

STEP BY STEP – ADJUST TAKE-OFF QUANTITIES

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. In the Forecast (T/O) Quantity column, the Forecast (T/O) Quantity is brought over from the Pay Item & Proposal Register, but here you can adjust it if needed. Practice adjusting the Forecast T/O quantity of one of your cost items.
 - For this example, we'll change Clearing and Grubbing to **15.00 Acre** and Excavation to **40,000 CY**.

1	SITEWORK & ROADWAY	1.00	Each
+ 1.1	Mobilization	1.00	LS
+ 1.2	Clearing & Grubbing	15.00	Acre
+ 1.3	Excavation	40,000.00	CY
2	WATER & SEWER	1.00	Each
+ 2.1	10 PVC Pipe	1,000.00	LF

STEP BY STEP – CREATE A SUBORDINATE COST ITEM

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Right-click on a cost item and select **Insert Subordinate**.
 - This creates a new subordinate cost item below your selected cost item
3. For the subordinate cost item, enter a description.
4. Add a quantity and select your Unit of Measure.
 - For this example, we'll insert a subordinate under Clearing & Grubbing for Clearing

1	SITEWORK & ROADWAY	1.00	Each
+ 1.1	Mobilization	1.00	LS
+ 1.2	Clearing & Grubbing	15.00	Acre
+ 1.2.1	Clearing	15.00	Acre
+ 1.3	Excavation	40,000.00	CY
2	WATER & SEWER	1.00	Each
+ 2.1	10 PVC Pipe	1,000.00	LF

TIP

You can create a subordinate at the same level, by right clicking on an equal-level cost item and selecting **Insert**.

STEP BY STEP – DEFINE A PLUGGED COST

- 1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
- 2. Right-click on the **row header** for a cost item and select **Open**.
- 3. In the Cost Source drop-down field select **Plug**.
- 4. In the left section of the cost item, select the **Plug** tab.
- 5. Click in the Unit cost or Total cost field for a cost category and type in a **Numeric Value**.
 - For this example, on the Mobilization cost item, we'll add \$10,000 in the Total Cost field for both Labor and Owner Equipment.

1

200

SITEWORK & ROADWAY

1.1

641 0100

Mobilization

PI Assignment:

PI Line Number:

PI Description:

641 0100

1.1

Mobilization

Cost Item Summary

Detail : \$0.00

Plug : \$20,000.00

Quote : \$0.00

Allocation

Cost Category	Unit Cost	Total Cost
Total	\$20,000.00	\$20,000.00
Labor	\$10,000.00	\$10,000.00
Owned Equipment	\$10,000.00	\$10,000.00
Rented Equipment	\$0.00	\$0.00

STEP BY STEP – ADD COST DETAIL

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Right-click on **row header** for a cost item and select **Open**.
3. Select the **Detail** tab.
4. A blank row is available to define your costs. With your cursor in the code field, click the **Resource Selection** icon to open the Resource Selection Register.
5. Select a resource tab (e.g., Labor).
6. Select a resource.
7. Select **OK**.
8. Repeat the steps to add additional resources as needed.
9. Click in each resource's quantity field to change their quantity as needed.
10. From the lower-right section of the form, select the **Production** tab.
11. Type a **numeric value** in the Days field, then press **Tab**.
12. Click **OK** to close the record.
 - For this example, we'll add cost detail to the Clearing cost item, adding the following labor and equipment resources and production value:

Resource	Quantity
LL2 Laborer	2
LO1 Operator Class 1	1
EL988 Loader 988	1
Cost Item Production Value (in Days)	
8	

STEP BY STEP – DEFINE COST DETAIL BY ADDING AN ASSEMBLY

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Right-click on the **row header** for one of the cost items and select **Open**.
3. Select the **Detail** tab.
4. With your cursor in the Resource Assembly field, click the **Resource Assembly Selection** icon to open the Resource Assembly Selection Register.
5. Select an assembly, then click **OK**.
6. Because this crew includes duration-based resources, you need to enter a Production value. Select the **Production** tab.
7. Type a **numeric value** in one of the production fields (e.g., UoM/day), then press **Tab**.
 - For this example, on the Grading cost item, we'll add a Grading assembly with a production value of 1 Acre/Day.

The screenshot displays the 'Detail' tab for a 'Grading' cost item. The main table lists resources for a 'Grading Crew' with the following details:

Row Number	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure	Prod Fac
1	ETWT	CGRADE	Water Truck			0.50	Each	
2	LL2	CGRADE	Laborer			1.00	Each	
3	LO3	CGRADE	Operator Class 3			2.00	Each	
4	EG14G	CGRADE	Grader 14G			1.00	Each	
5	ECOMP1	CGRADE	Compactor Smooth Drum			1.00	Each	
6	LO4	CGRADE	Operator Foreman			1.00	Each	

The 'Production' panel on the right shows various production metrics. The 'Acre/Day' field is highlighted and set to 1.00.

	Duration Driven Resources	Factored Duration Driven Resources
Days	10.00	10.00
Shifts	10.00	10.00
Hours	80.00	80.00
Man-Hours	320.00	320.00
Equip-Hours	200.00	200.00
Acre/Day	1.00	1.00
Acre/Shift	1.00	1.00
Acre/Hour	0.13	0.13
Acre/Man-Hr	0.03	0.03

STEP BY STEP – ADJUST SHIFT ARRANGEMENTS

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Right-click on the **row header** for a cost item and select **Open**.
3. Select the **Cost Item Setup** tab in the lower-right portion of the form (the tab name may be abbreviated).
4. In the Default Pay Rules data block, adjust your Composite Wage Scale as needed.

The screenshot shows the 'Cost Item Setup' dialog box. At the top, there are fields for '15.00', 'Acre', '\$1,079.93', '\$16,198.97', and 'U.S. Dollar'. Below these are 'Cost Segment: Direct Cost', 'Pay Quantity: 10.00', 'Cost Source: Detail', and 'Alternate: BASE'. The 'Default Pay Rules' section is expanded, showing 'Composite Wage Scale: 80.00', 'Scale 1: 80.00', 'Scale 2: 20.00', and 'Scale 3: 0.00'. Below this, it says 'For every 8.00 hours worked, pay 8.00 hours'. The 'Default Shift Arrangements' section shows 'Work Hours per Shift: 8.00', 'Shifts per Day: 1.00', and 'Days per Week: 5.00'. The 'Default Properties' section is partially visible at the bottom.

5. Under the Composite Wage Scale, adjust the number of hours and paid as needed

This screenshot is a closer view of the 'Default Pay Rules' section. It shows 'Composite Wage Scale: 80.00', 'Scale 1: 80.00', 'Scale 2: 20.00', and 'Scale 3: 0.00'. Below this, it says 'For every 10.00 hours worked, pay 10.00 hours'. The 'Default Shift Arrangements' section shows 'Work Hours per Shift: 8.00', 'Shifts per Day: 1.00', and 'Days per Week: 5.00'.

6. In the Default Shift Arrangements data block, make changes as needed.

Cost Item Setup

Default Pay Rules

Scale 1:Scale 2:Scale 3:

Composite Wage Scale:80.0020.000.00

For every10.00hours worked, pay10.00hours

Default Shift Arrangements

Work Hours per Shift:Shifts per Day:Days per Week:

10.005.00

Default Penalties

- For this example, we'll make the following changes on the Clearing cost item:
 - Composite Wage Scale – 80% Scale 1, 20% Scale 2.
 - For every 10 hours worked, pay 10 hours.
 - Default Shift Arrangements – Change Work Hours per Shift to 10.

Cost Item Setup

Default Pay Rules

Scale 1:Scale 2:Scale 3:

Composite Wage Scale:100.000.000.00

For every8.00hours worked, pay8.00hours

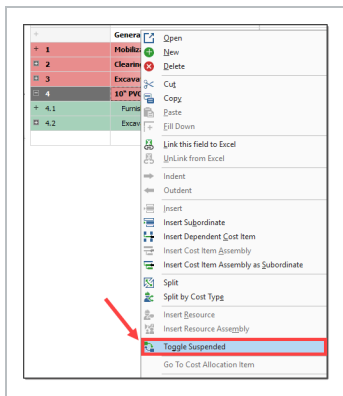
Default Shift Arrangements

Work Hours per Shift:Shifts per Day:Days per Week:

8.001.005.00

STEP BY STEP – SUSPEND A COST ITEM

1. On the **Cost Breakdown Structure (CBS) Register**, select a **cost item**.
2. Right click on the selection and select **Toggle Suspended** from the menu.
 - You can also select Toggle Suspended under the Edit section of the Actions tab up above
 - You can also suspend cost items by checking the Suspend checkbox on the Cost Item Setup tab of a cost item record



- If a superior cost item is suspended, its subordinate cost items are automatically suspended as well

+ 3.1	Excavate	40,000.00	LY
+ 3.2	Haul	40,000.00	CY
4	10" PVC Pipe	1,000.00	LF
+ 4.1	Furnish Pipe Materials	1,000.00	LF
+ 4.2	Excavate-Install-Backfill	1,000.00	LF

- The costs associated with these cost items will no longer contribute to the estimate

STEP BY STEP – UNSUSPEND A COST ITEM

1. On the Cost Breakdown Structure (CBS) Register, select a **cost item**.
2. Right click on the selection and choose **Toggle Suspended**.
 - You can also select Toggle Suspended from the Edit section of the Actions tab
 - You can also unsuspend cost items by unchecking the Suspend checkbox on the Cost Item Setup tab of a cost item record

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LESSON 6 - INDIRECT COSTS

STEP BY STEP – ADD JOB MANAGEMENT & EQUIPMENT COSTS

1. In your job, from the Estimate landing page, select the **Cost Breakdown Structure (CBS)**.
2. Double-click on the row header of the **Job Management & Equipment** indirect cost item.
3. Add resources by clicking in the Code column and selecting the **Icon**.
4. Select the **Production** tab.
5. Enter a production value.
6. Click **OK** to close the record.
 - For this example, we'll add the following resources and production:

Resource	Quantity
LSSEC Secretary	1
LSSUPT Project Superintendent	1
Cost Item Production Value (in Days)	
	70

STEP BY STEP – ADD GENERAL EXPENSE COSTS

1. From the Estimate tab, select the **Cost Breakdown Structure (CBS)**.
2. Right-click the row header of the **General Expense** row header and select **Open**.
 - You could add existing resources here, but in this case, you will create an ad hoc resource.
3. In the first blank row, enter a description, quantity and unit of measure.
4. Click on (highlight) that row, and then click the **Resource Employment Breakdown** tab.
5. Type a **numeric value** in the Undefined Supplies cost category.
6. Click **Ok** to close the record.
 - For this example, we'll add General Office Supplies, 1 Lump Sum, \$1,000 in the Supplies category.

The screenshot displays the 'General Expense' row in the Cost Breakdown Structure (CBS) and the 'Resource Employment Breakdown' tab. The 'General Expense' row is highlighted, showing a quantity of 1.00, a unit of measure of Lump Sum, and a cost of \$1,000.00. The 'Resource Employment Breakdown' tab is active, showing a table with columns for Cost Category and Scale 1. The table lists various cost categories: Total (\$1,000.00), Labor (\$0.00), Owned Equipment (\$0.00), Rented Equipment (\$0.00), Supplies (\$1,000.00), and Undefined Supplies (1000).

Row Number	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure
1			General Office Supp...	1.00	0.00	1.00	Lump Sum

Cost Category	Scale 1
Total	\$1,000.00
Labor	\$0.00
Owned Equipment	\$0.00
Rented Equipment	\$0.00
Supplies	\$1,000.00
Undefined Supplies	1000

STEP BY STEP – DELETE EXISTING DEFAULT DEPENDENT COST ITEMS

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Select an **Indirect Cost Item** by clicking on its row header.
3. Press and hold the Ctrl or Shift key to select multiple indirect cost items.
4. Right-click on the **selection** and select **Delete**.
5. Select **Yes** to confirm you want to delete the selected cost items.

STEP BY STEP – DEFINE PRIME BOND

1. From the Estimate tab, select **Cost Breakdown Structure (CBS)**.
2. Right-click on the **row header** for any cost item and insert **Dependent cost Item**.
3. On the resulting Attention prompt, select **Based on Bond Table**.
4. Click **OK**.
5. Right-click on the Prime Bond row header and select **Open**.
6. Use the Table Name drop-down to choose a table (e.g., Example: General Construction).
7. Click **OK** to close the record.

STEP BY STEP – DEFINE A PRICE % ADD-ON

- 1. From the Cost Breakdown Structure (CBS) Register, right-click on the **row header** for any cost item and select **Insert Dependent Cost Item**.
- 2. On the resulting Attention prompt, select **Based on Job's Price**.

Attention

Choose what type of Dependent Cost Item to add:

☒

Based on Job's Price

☐

Based on Job's Finance Cost

☐

Based on Bond Table

☐

Based on Direct Costs

☐

Based on Indirect Costs

☐

Based on CBSMan Hours

☐

Based on CBSEquipment Hours

☐

Based on Resource Utilization

☐

Based on Assembly Utilization

OK

Cancel

- 3. Click **OK**.
- 4. Double-click on the **Price % Add On** row header to open the record.

CBS Position Code	Description	Optional Code
	JOB	
+	Job Management & Equipment	JOB MANAGEMENT & E...
+	General Expense	GENERAL EXPENSE
+	Prime Bond	PRIME BOND
→ +	Price % Add-On	PRICE % ADD-ON
+ 1	Mobilization	1000

5. The Price % Add-on Record opens to the Description tab. Type a **description** in the Description field and enter a **numeric value** for rate.

Cost Breakdown Structure (CBS) Register

Price % Add-On Record

CBS Code:

Description:

Price % Add-On

Description

Dependency

Drag columns here to group

	Description	Rate	Account Code	
	Office Overhead	4.00		
				

6. Click **OK** to close the record.
- For this example, we'll enter a description of Office Overhead and a rate of 4%.

STEP BY STEP – DEFINE A DIRECT COST ADD-ON

1. From the Cost Breakdown Structure (CBS) Register, right-click on the **row header** for any cost item and select **Insert Dependent Cost Item**.
2. On the resulting Attention prompt, select **Based on Direct Costs**.
3. Click **OK**.
4. Double-click on the **Direct Cost Add-On** row header.
5. On the Description tab, type a **description** in the Description column.

Cost Breakdown Structure (CBS) Register **Direct Cost Add-On Record** ⓘ

CBS Position Code: Description:

Direct Cost Add-On

Description Dependency Cost Categorization Allocation

Drag columns here to group

Description	Curre...	Total Cost (Forecast)
Small Tools		

6. Press the **Tab** key (you can define additional rows for other add-on costs as needed).
7. Click on the **Dependency** tab to see what contributes to your subject cost.
8. For this activity, leave the default (lower) button selected.

Toggle Include All
(Affects displayed items only)

☐ Define the Subject Cost by viewing all available items and clicking the Include box for the desired items

☒ Define the Subject Cost using column filtering (all current and future items that match the filter will be included automatically)

9. On the Cost Breakdown tab on the right, add an add-on rate (percentage) or cost at any of the cost category levels you need.
 - This updates the Total Cost (Forecast) of your item on the Description tab
10. Click **OK** to close the record.
 - For this example, we'll create a new Direct Cost Add-On, giving it a description of Small Tools with a rate of 10% on the Labor cost category

CBS Position Code:		Description:		Total Cost:	Currency:	Alternate:
		Direct Cost Add-On		\$5,701.36	U.S. Dollar	BASE
PI Assignment:	PI Line Number:	PI Description:		Cost Segment:	Pay Quantity:	
				Job Overhead	1.00	

Description	Dependency	Cost Categorization	Allocation
Drag columns here to group Saved views: Standard View			
Description		Currency	Total Cost (Forecast)
Small Tools		U.S. Dollar	\$5,701.36

Cost Breakdown			
Cost Category	Subject Cost	Rate	Cost
▼ Total	\$99,107.22	5.75	\$5,701.36
▶ Labor	\$57,013.62	10.00	\$5,701.36
▶ Owned Equipment	\$38,555.52	0.00	\$0.00
▶ Rented Equipment	\$0.00	0.00	\$0.00
▶ Supplies	\$0.00	0.00	\$0.00
▶ Materials	\$3,276.00	0.00	\$0.00
▶ Subcontract	\$0.00	0.00	\$0.00
▶ Fees	\$262.08	0.00	\$0.00
▶ Allowance	\$0.00	0.00	\$0.00
Custom Category 1	\$0.00	0.00	\$0.00
Undefined	\$0.00	0.00	\$0.00

STEP BY STEP – ADD USER-DEFINED INDIRECT COST ITEMS

Let's walk through a specific scenario for this step by step.

1. At the bottom of your CBS, create an indirect cost item called Job Overhead with a Forecast (T/O) Quantity of **1** and Unit of Measure of **Each**.
2. Add two **subordinates** under the new cost item named Job Trailer and Utilities. Job Trailer is **1 Each** but change Utilities to **1 Lump Sum**.
3. Open the Job Trailer cost item by double-clicking on the row header.
 - Assuming there is no Job Trailer in our Resource Rate Register, you will create this resource "on the fly".
4. In the Detail grid, click on the **Resource Register** icon in the Code field as if you were going to select from the Resource Rate Register.
5. On the Resource Rate Register, click the **Rented Construction Equipment** tab.
6. Right-click on one of the **Line Items** and select **New** to add a new resource.
7. Enter a Resource Code of **RJT** and description of **Job Trailer**.
8. In the Amount column enter **25** for the Rented Equipment category.
9. Click **OK** to close the Resource Rate Record.
10. Select the **new resource** you created, then click **OK** to return to the cost item record.
11. On the cost item record, adjust the Job Trailer quantity to **2**.
12. On the Production tab, enter **70** days.
13. Click **OK** to close the record.
14. On the CBS register, select the **Utilities** cost item by double-clicking on the row header.
15. Create an ad hoc resource on this cost item called **Electricity**, which will be 1 Lump Sum.
16. Finally, go to the Resource Employment Breakdown tab and enter **1500** in the Custom Category1 row.

17. Click **OK** to close the record.

3		Job Overhead				1.00		Each		\$31,740.00		\$31,740.00	
- 3.1		Job Trailer				1.00		Each		\$30,240.00		\$30,240.00	
	Row Number	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure	Work Hours	Pay Hours	Unit Cost	Total Cost (Forecast)	
→	+	1	RJT	Job Trailer			2.00	Each	1,1...	1,1...	\$27.00	\$30,240...	
- 3.2		Utilities				1.00		Lump Sum		\$1,500.00		\$1,500.00	
	Row Number	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure	Work Hours	Pay Hours	Unit Cost	Total Cost (Forecast)	
→	+	1		Electricity	1.00	0.00	1.00	Lump ...			\$1,500...	\$1,500.00	

LESSON 7 - FINALIZE ESTIMATE

STEP BY STEP – ADD PROFIT AS A PERCENTAGE OF TARGET PRICE

1. Open your job.
2. Select the **Price** tab.
3. Select **Price Breakdown Structure** (PBS) from the Overhead and Profit section.
4. On the Target Profit row, enter a **numeric value** in the % of Target Price column; press **Tab**.
 - For this example, we'll add 10% for the Target Profit.

STEP BY STEP – MODIFY THE DIRECT COST MARKUP RECORD

1. On the **PBS** form, double-click on the **Direct Cost Markup** row.
2. In the record, overwrite the Default entry with **Direct Cost Markup** in the description field.
3. In the Rate column on the Dependency Cost Breakdown, add a **numeric value** in Labor, Owned Equipment, Materials and Fees categories. Then reset other categories back to **0**.
4. Click **Ok** to save your changes and return to the PBS.
5. Click the **Refresh Summary Data** button to see the changes reflected.
 - For this example, we'll add a rate of 15 for Labor, 10 for Owned Equipment, 8 for Materials, and 2 for Fees, then zero out all other categories.

Description	Dependency	Allocation
Drag columns here to group		
Saved views: Previous View		
Description	Currency	Total Cost (Forecast)
→ Direct Cost Markup	U.S. Dollar	\$13,081.82
*		

Cost Breakdown			
Cost Category	Subject Cost	Rate	Cost
▼ Total	\$102,786...	12.73	\$13,081.82
> Labor	\$57,792.70	15.00	\$8,668.91
> Owned Equipment	\$41,455.92	10.00	\$4,145.59
> Rented Equipment	\$0.00	0.00	\$0.00
> Supplies	\$0.00	0.00	\$0.00
> Materials	\$3,276.00	8.00	\$262.08
> Subcontract	\$0.00	0.00	\$0.00
> Fees	\$262.08	2.00	\$5.24
> Allowance	\$0.00	0.00	\$0.00
> Custom Category 1	\$0.00	0.00	\$0.00
Undefined	\$0.00	0.00	\$0.00

STEP BY STEP – DEFINE PRICING MANUALLY

1. From the Estimate landing page, select the **Price** tab.
2. Select **Pay Item & Proposal** from the Pay Items section.
3. Select a **Pay Item** row.
4. In either the Unit Price (current), Total Price (current), or % Margin field of a pay item, type a **numeric value**.

For this example, we'll do the following:

- Mobilization pay item – change Total Price (current) to \$20,000.
- Clearing & Grubbing pay item – change % Margin to 5%.

Position Code	Pay Item Number	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Unit Price (current)	Total Price (current)	% Margin
1	200	SITEWORK & ROADWAY					\$51,369.60	
+ 1.1	641 0100	Mobilization	1.00	1.00	LS	\$20,000.00	\$20,000.00	-34.67
+ 1.2	201 0102	Clearing & Grubbing	10.00	15.00	Acre	\$3,136.96	\$31,369.60	5.00

STEP BY STEP – USE AUTOPRICE TO BALANCE AND HIT THE TARGET TOTAL

1. Open the your job in Estimate.
2. From the Estimate landing page, select the **Price** tab.
3. Click on **Pay Item & Proposal** to open the Pay Item & Proposal Register.
4. On the Pay Item & Proposal Register menu, choose **Actions > Balanced Bid > Hit Target Total**.
5. Review the Proposal Recap and see that the Variance is now \$0.00. Now that the job is balanced, you can see that the Current Price and the Target Price are the same, indicating that the costs and profit are spread proportionately over your pay items.

STEP BY STEP – UNBALANCE HIT TARGET TOTAL

1. You may encounter overrun and/or underrun items in the Pay Item & Proposal Register of your job.

Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Meas...	Curre...
Excavation	10.00	15.00	Cubic Yard	U.S. Dollar
Clearing & Grubbing	50,000.00	40,000.00	Acre	U.S. Dollar

2. If you do, highlight the row for each item to view it's current balanced item recap.

Item Recap - 2000 Clearing & Grubbing			
	Balanced Unit	Current Unit	
▲ Price:	\$4,985.70	\$4,994.91	
▲ Profit:	\$515.91	\$525.12	
▲ Total Cost:	\$4,469.79	\$4,469.79	
▲ Business Overhead:	\$245.35		
▲ Job Overhead:	\$1,681.60		
▲ Unassigned Direct Cost:	\$0.00		
▲ Assigned Direct Cost:	\$2,542.84		

Item Recap - 3000 Excavation			
	Balanced Unit	Current Unit	
▲ Price:	\$2.86	\$2.86	
▲ Profit:	\$0.29	\$0.29	
▲ Total Cost:	\$2.57	\$2.57	
▲ Business Overhead:	\$0.15		
▲ Job Overhead:	\$0.91		
▲ Unassigned Direct Cost:	\$0.00		
▲ Assigned Direct Cost:	\$1.52		

3. On the Pay Item & Proposal Register menu, choose **Actions > Unbalanced Bid**.

Actions

Link Field
Unlink Field

Assigned Direct Cost Only
Balanced Bid
Unbalanced Bid

☒ Overwrite Locked Pay Items
Custom Auto Price

Workbook
Auto Price

- You will see the changes reflected and how the profit was spread to your overrun and underrun items

Unit Price (current)	Total Price (current)	% Margin
\$3,000.00	\$150,000,000.00	-9.26
\$4,871.84	\$48,718.40	97.68
\$91,100.00	\$91,100.00	10.05

- In the example shown, highlighting each item will show that all your overhead and profit from Excavation was put onto Clearing & Grubbing.

Item Recap - 2000 Clearing & Grubbing		
	Balanced Unit	Current Unit
 Price:	\$4,985.70	\$11,706.11
 Profit:	\$515.91	\$7,236.32
Total Cost:	\$4,469.79	\$4,469.79
 Business Overhead:	\$245.35	
 Job Overhead:	\$1,681.60	
 Unassigned Direct Cost:	\$0.00	
 Assigned Direct Cost:	\$2,542.84	

Item Recap - 3000 Excavation		
	Balanced Unit	Current Unit
 Price:	\$2.86	\$1.52
 Profit:	\$0.29	(\$1.05)
Total Cost:	\$2.57	\$2.57
 Business Overhead:	\$0.15	
 Job Overhead:	\$0.91	
 Unassigned Direct Cost:	\$0.00	
 Assigned Direct Cost:	\$1.52	

STEP BY STEP – LOCK PRICE

1. Select the **Lock Price** checkbox on an item's row.

Pay Item Number	Description	Lock Price	Pay Quantity	Forecast (T/O) Quantity
+ 202 0183	Unclassified Excavation	☐	50,000.00	50,000.00
+ 641 0100	Mobilization	☒	1.00	1.00
+ 201 0102	Clearing & Grubbing	☐	10.00	10.00

2. After making further adjustments in the next step by step, you will return to the Pay Item & Proposal to rebalance.
- You can continue to adjust at previous levels aside from solely in the Pay Item & Proposal Register
 - For example, you could make a last-minute adjustment in the PBS or CBS. You can make adjustments anywhere, but for this example an adjustment will be made in the Direct Cost Add-On record at the CBS level

STEP BY STEP – MAKE LAST MINUTE BID ADJUSTMENTS

1. With your job open, select the **Estimate** tab.
2. Click on **Cost Breakdown Structure** to open the CBS.
3. Double click on the row header to open the **Direct Cost Add-On** dependent cost item record.
4. Under the Description tab on the left, click in the blank row under the **Description** column.
5. Type in a **description**.
6. Make the adjustment by typing a **numeric value** in the **Cost column** of the Materials Cost category under the Cost Breakdown section on the right.

Cost Breakdown				
Cost Category	Subject Cost	Rate		Cost
▼ Total	\$130,759.83	-0.76		(\$1,000.00)
▶ Labor	\$58,969.83	0.00		\$0.00
▶ Owned Equipment	\$68,251.92	0.00		\$0.00
▶ Rented Equipment	\$0.00	0.00		\$0.00
▶ Supplies	\$0.00	0.00		\$0.00
▶ Materials	\$3,276.00	-30...		(\$1,000.00)
▶ Subcontract	\$0.00	0.00		\$0.00
▶ Fees	\$262.08	0.00		\$0.00
▶ Allowance	\$0.00	0.00		\$0.00
Custom Category1	\$0.00	0.00	→	\$0.00
Undefined	\$0.00	0.00	→	\$0.00

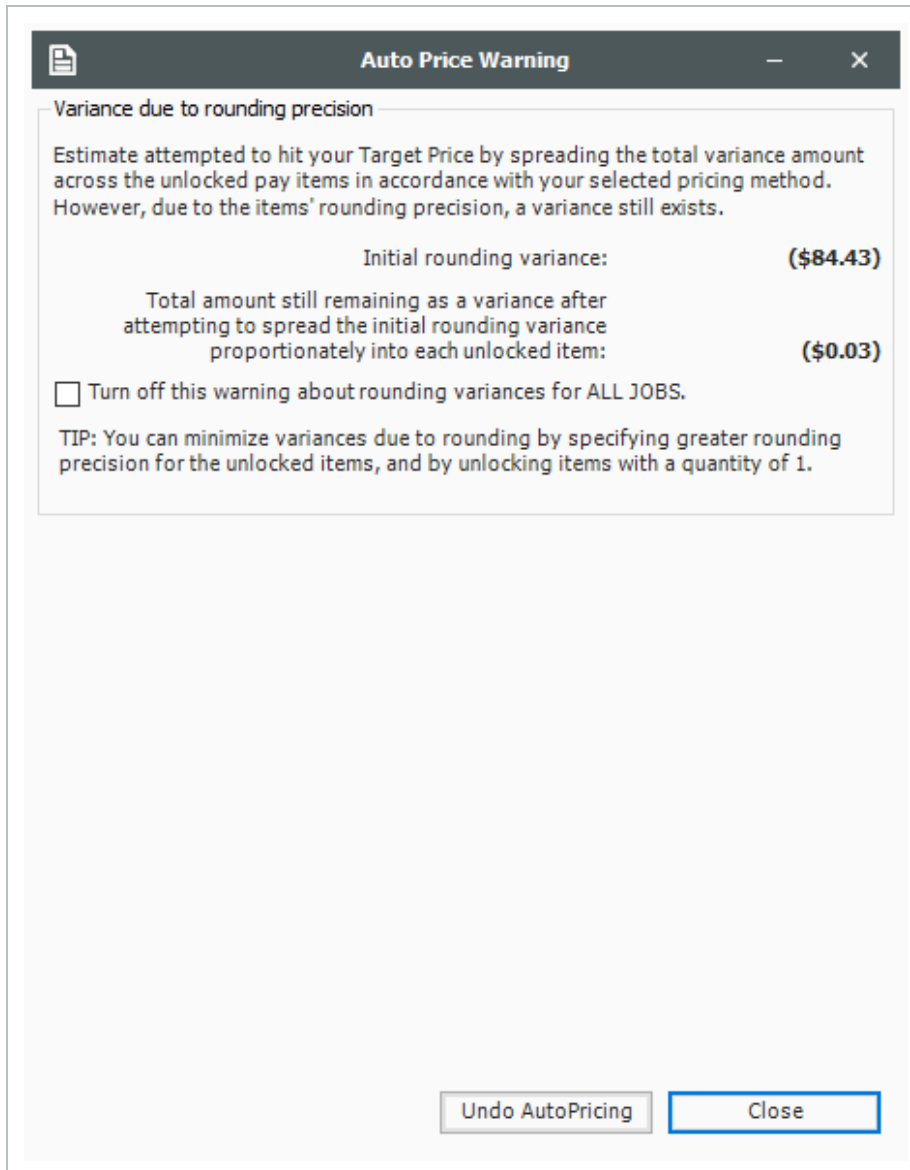
- To make a cut, enter a negative value, i.e. -1000

7. Press the **Tab** key, and your adjustment will be reflected on the left-hand side.

Description	Dependency	Cost Categorization	Allocation	
Drag columns here to group				
Description		Curre...	Total Cost (Forecast)	Ac Co
Small Tools		U.S. Dollar	\$5,896.98	
Safety & Training		U.S. Dollar	\$2,948.49	
→ Cut		U.S. Dollar	(\$1,000.00)	

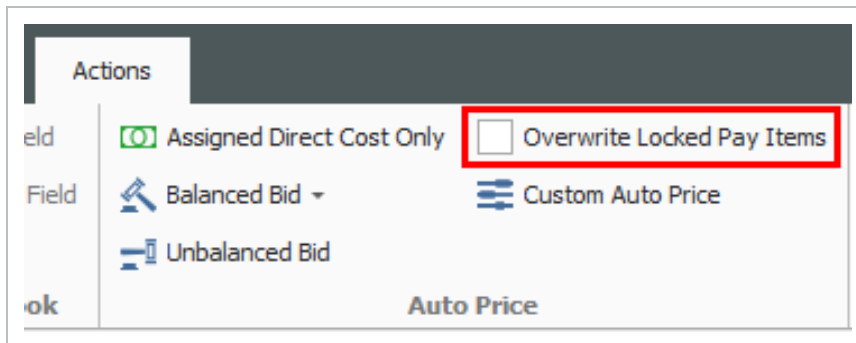
8. Finally, return to the **Pay Item & Proposal**.

9. On the **Actions** menu, select **Balanced Bid > Hit Target Total**.
10. An Auto Price Warning may display, informing you of rounding variances. After reading the details, click the **Close** button.



- Note on the proposal recap that a variance may still exist because there are limited number of pay items to spread the rounding error over
- Note that the locked item did not adjust, but the other pay items were updated

- Note that you can overwrite locked items for spreading your price by checking the **Overwrite Locked Pay Items** option on the Actions menu

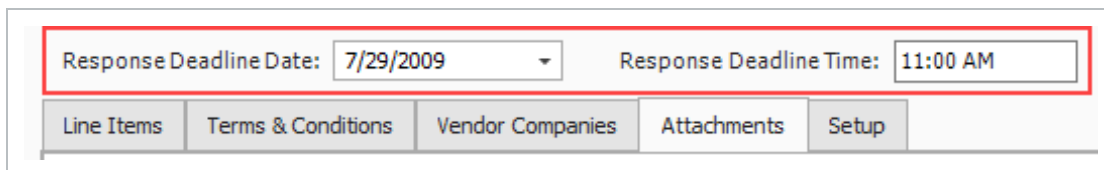


LESSON 8 - QUOTE MANAGEMENT

STEP BY STEP – CREATE AND PUBLISH AN RFQ

This exercise walks through a specific example using the Training Job.

1. From the Estimate landing page, select the **Quote** tab.
2. Select **Request for Quote (RFQ)**.
3. From the Actions tab, click on the **New** icon to create a new RFQ.
4. Select **Create RFQ from Quote Group Tag(s)**, leaving the checkboxes checked to only show quote groups and resources that are being used.
5. Select the **Aggregates** quote group from the right panel.
6. Click **OK**.
7. 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. 11:00 am).



The screenshot shows a form with two fields: "Response Deadline Date:" with a dropdown menu showing "7/29/2009" and "Response Deadline Time:" with a text input showing "11:00 AM". Below these fields are five tabs: "Line Items", "Terms & Conditions", "Vendor Companies", "Attachments", and "Setup". The "Terms & Conditions" tab is currently selected.

8. Select the **Terms & Conditions** tab.
9. Create and type **Prices are good for the duration of the contract** in the Buyer's Special Terms & Conditions field.
10. Type in **All items to be delivered to jobsite by supplier's trucks** in the RFQ Instructions field.
11. Select the **Vendor Companies** tab and click in the **first blank row** in the Company Name column.

Line Items	Terms & Conditions	Vendor Companies	Attachments	Setup	
Drag columns here to group					
	Vendor	Contact	Status	Publish Item Quantities	Vendor Phone
	SUB18	SUB18 -- Mel Blank	New	☒	111-222-3232
	SUB4	SUB4 -- Harry Belefony	New	☒	111-222-1111
	Ven18	Ven18 -- CARRIE Matty	New	☒	111-333-3434
				☐	

12. Click on the **Address book**  icon, and then select the following example vendors:

- Example Vendor 1: Pat Roberts
- Example Vendor 2: Stan Mark
- Example Vendor 4: Lester Slim

13. Click **OK**.

14. Make sure **Publish to File** is checked for all vendors.

15. Uncheck **Publish by email** for each vendor.

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

- 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

REQUEST FOR QUOTATION

Job: Training Job Training Job - Maricopa County No. TM2924

TO:

FROM:

Name:

Pat Roberts

Company:

Example Vendor 1
100 Tenth Street
Hometown, AZ 889080

Phone:

111-123-2134

Mobile Phone:

222-123-1234

Fax:

222-123-1234

Email:

Name:

Tom Cross

Company:

Example Prime Contractor 1
400 First Street Suite 4000
Hometown, AZ 889004

Phone:

111-122-1111

Mobile Phone:

222-112-2211

Fax:

222-112-2211

Email:

Job Information:

Training Job
Training Job - Maricopa County No. TM2924

Owner:	Example Owner
Job Type:	Highway and General Engineering
Job Location:	I-10 MP 100 to MP 120
City:	Phoenix
County:	Maricopa
State / Province:	Arizona
Country:	United States
Bid Location:	Engineer's Office
Bid Date:	1/8/2020
Bid Time:	10:00 PM
Measurement System:	English

Request for Quote (RFQ) Information:

- 17. On the Actions tab of the record, select **Publish** to create your RFQ document.
- 18. Select the folder to publish to.
- 19. Click **OK** to save the RFQ Record.

STEP BY STEP – CREATE A QUOTE FROM RFQ

This exercise walks through a specific example using the Training Job.

1. From the Estimate landing page, select the **Quote** tab.
2. Select **Request for Quote (RFQ)**.
3. Open the RFQ record for which you've received quotes.
4. Select the **Vendor Companies** tab and select the vendors for whom you need to create quotes.
In this case, select all the vendors.
5. From the Actions menu, select **Create Quote**.
6. Click **OK** on the Quotes created prompt.
7. Close the RFQ record and the RFQ register.

STEP BY STEP – ENTER QUOTE DETAILS

This exercise walks through a specific example using the Training Job.

- 1. To open the Quote Register, select **Quote** from the Estimate landing page.
- 2. Select **Quotes** from the Quote Management section.
- 3. Open the Aggregates Quote Record for Vendor 1 – Pat Roberts.
- 4. On the Resources tab, make sure No Split is unchecked for all items.
- 5. Also on the Resources tab, enter the following unit prices:

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

- 6. Click **OK** to close the Quote Record.

STEP BY STEP – CREATE A MULTI-PACKAGED 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**).

Cost Breakdown Structure (CBS) Register

Quote Register

Quote Record

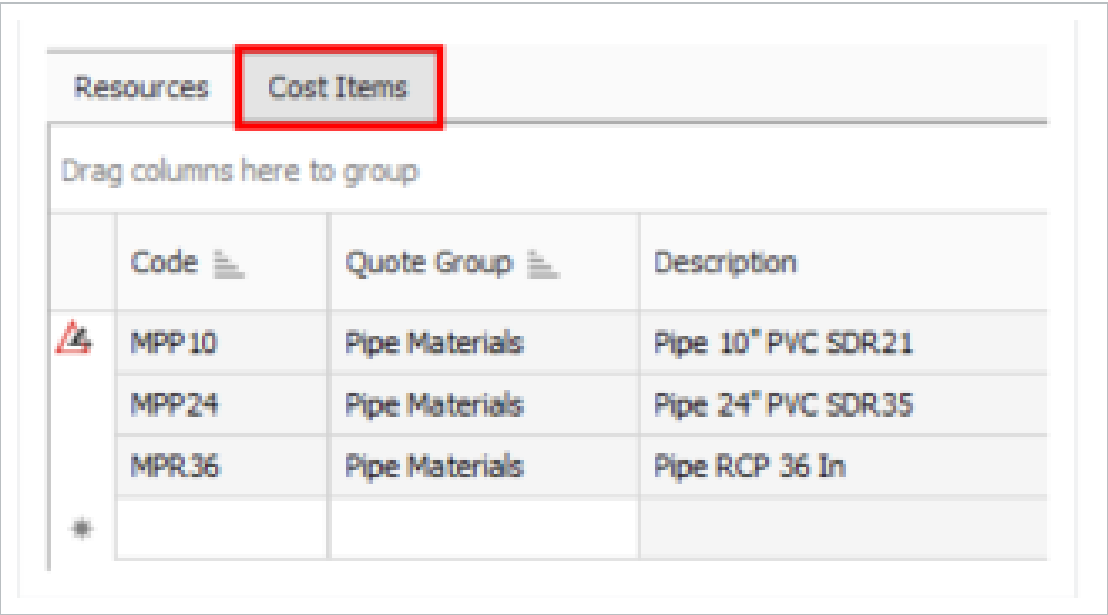
Drag columns here to group

	Description	RFQ Description	Quote Status	Seller
→	Pipe Materials		Received	Example Vendor
⚠	Pipe Materials		Received	Example Vendor
	Pipe Materials		Received	Example Vendor
⚠	Pipe Materials		Received	Example Vendor
*				

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

Cost Breakdown Structure (CBS) Register	Quote Register	Quote Record
Header		
Description:	Pipe Materials for site improvements.	
Contact:	Example Vendor 1 -- Pat Roberts	
Company Name:	Example Vendor 1	

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



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:
 - Code: **P1**
 - Description: **On Site**
 - Amount: **\$200,000**
 - Code: **P2**
 - Description: **Off Site**
 - Amount: **\$300,000**

Packages			
Drag columns here 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.

Resources							Packages		
Cost Items							Drag columns here to group		
Drag columns here to group: [Search For...] ... Saved views: Previous View									
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
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.

Detail	Example Vendor 1 Pipe Materials		Example Vendor 6 WBE Pipe Materials		Example Vendor 1 Pipe Materials for site improvements	
 \$22.51	 P1	\$290,000.00	 P1	\$300,000.00	 P1	\$200,000.00
 \$52.84	 P2	\$126,000.00	 P2	\$125,000.00	 P2	\$300,000.00
\$428,694...		\$416,000.00		\$425,000.00		\$500,000.00
\$428,694...		\$416,000.00		\$425,000.00		\$500,000.00
\$428,694...		\$0.00		\$0.00		\$0.00
\$428,694...		\$416,000.00		\$425,000.00		\$500,000.00
\$0.00		\$0.00		\$0.00		\$0.00
	11/13/2019 4:1...		11/13/2019 4:4...		11/13/2019 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.

Example Vendor 1
Pipe Materials for site improvements.

 P1	\$200,000.		
 P2	\$300,000.		
	\$500,000.		
	\$500,000.		
	\$0.00	\$0.00	
	\$500,000.00	\$500,000.00	

 Award

 Award And Lock

 Lock

 Unlock

 Edit Quote

 Edit Cost Item

 Edit Package

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.

Cost Breakdown Structure (CBS) Register										
Quote Register										
Quote Comparison & Award - Resources										
Find: [Search For...] Saved views: Standard View										
Resource Code	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	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	\$31.50	\$35.70	\$34.13	\$34.13
MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	\$7.25	\$7.35	\$8.19	\$8.19
MPP10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	\$12.60	\$13.65
MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	\$25.20	\$22.05
MPP36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	\$31.50	\$32.55
Scope Items										
Summary										
Minority Type										
Quoted Total										
Comparable Total										
DBE										
\$1,406,973.75 \$0.00 \$1,171,100.70 \$1,325,646.00 \$266,616.00 \$271,471.20										
\$1,406,973.75 \$1,406,973.75 \$1,308,747.30 \$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	Edit Resource	Duplicate Quote	Package Entire Quote	Award	Lock	Quoted Items	Zero Items
Preview	All Quote Groups	Set All to Not Reviewed	Edit Quote	Ignore Quote	Edit Package	Award And Lock	Unlock	Unit Price	Scope Items
Export to Excel	All Quote Items							Substitute Values	Ignored Quotes

Cost Breakdown Structure (CBS) Register										
Quote Register										
Quote Comparison & Award - Resources										
Find: [Search For...] Saved views: Standard View										
Resource Code	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	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	\$31.50	\$35.70	\$34.13	\$34.13
MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	\$7.25	\$7.35	\$8.19	\$8.19
MPP10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	\$12.60	\$13.65
MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	\$25.20	\$22.05
MPP36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	\$31.50	\$32.55
Scope Items										
Summary										
Minority Type										
Quoted Total										
Comparable Total										
DBE										
\$1,406,973.75 \$0.00 \$1,171,100.70 \$1,325,646.00 \$266,616.00 \$271,471.20										
\$1,406,973.75 \$1,406,973.75 \$1,308,747.30 \$1,463,292.60 \$1,535,943.15 \$1,540,798.35										

- 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.

Request for Quote (RFQ) RegisterQuote RegisterQuote Record

Header

Description:Asphalt Materials

Vendor:<Add-Hoc Vendor>Vendor Name:Vendor Phone:Vendor Email:<Add-Hoc Contact>First Name:Contact Office:Contact Mobile:External Ref:

Optional Code:Date:Source:Currency:U.S. DollarStatus:ReceivedIgnore:Reason:

TotalExtended Price:\$1,062,834.00Item Taxes:\$53,141.70Quote Tax:Item Conditions:\$0.00Special Conditions:\$0.00Total:\$1,115,975.70

ResourcesCost Items

Drag columns here to group

Code	Quote Group	Description	No Split	Free	Awarded	Duration	Quantity	Unit of Measure	Unit Price	Extended Price	Currency	Default Tax Rate
MAAM	Asphalt Materials	Asphalt Mix (Fresh)	☒	☐	☒	1	35,000.00	Ton	\$30.00	\$1,050,000.00	U.S. Dollar	
MAFA	Asphalt Materials	Pine Aggregate	☒	☐	☒	1	1,860.00	Ton	\$6.90	\$12,834.00	U.S. Dollar	

Special Terms & Conditions

Buyer's Special Terms & Conditions

☐ Vendor's Special Terms & Conditions

Special Conditions Adjustments:\$0.00

Distribute Special Conditions:EvenlyUsing Weighted Average

☒ Include Special Conditions costs for unawarded quotes in Comparable Totals

Drag columns here to group

Row Number	Scope Item	Quote Group	Included	Amount	% of Total	Notes
				\$0.00		
				\$0.00		

Special Terms & ConditionsQualificationsPackagesTaxerVendor's ProfileSetupMinority

OKCancelNew...< PrevNext >

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

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.

Print	By Quote Group	Set All to Reviewed	Edit Resource	Duplicate Quote	Package Entire Quote	Award	Lock	Quoted Items	Zero Items	Configure Totals	Session Recap
Preview	All Quote Groups	Set All to Not Reviewed	Edit Quote	Ignore Quote	Edit Package	Award And Lock	Unlock	Edit Prices	Unit Price	Scope Items	Auto Award
Export to Excel	All Quote Items							Substitute Values	Ignored Quotes	Default Data Blocks	
Print	Layout	Quote Group Status	Resources								Tools

Cost Breakdown Structure (CBS) Register										Find: [Search For...]		Saved views: Previous View	
Resource Code	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor 1 Asphalt Materials	Example Vendor 2 Asphalt Materials	Example Vendor 3 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials			
MAM	Asphalt Mix (Fresh)	36,750.00	Ton	\$31.50		\$34.13	\$34.13	\$33.50	\$35.70	\$34.13			
WAFR	Fine Aggregate	1,860.00	Ton	\$2.25		\$8.19	\$8.28	\$7.25	\$7.25	\$8.19			
MPP10	Pipe 10" PVC SDR31	12,600.00	Linear Feet	\$13.65		\$3.38	\$3.28	\$3.28	\$3.28	\$12.60			\$13.65
MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05		\$20.48	\$20.48	\$20.48	\$20.48	\$25.20			\$22.05
MPP36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55		\$34.13	\$34.13	\$34.13	\$34.13	\$31.50			\$32.55
Scope Items													
Summary													
Minority Type													
Quoted Total						\$1,406,973.75	\$0.00	\$1,171,100.70	\$1,325,646.00	\$266,616.00		\$271,471.20	
Comparable Total						\$1,406,973.75	\$1,406,973.75	\$1,308,747.30	\$1,463,292.60	\$1,535,943.15		\$1,540,798.35	

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



Configure Totals

Caption	Visible	Sort
Seller	☒	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	☒	None
Substitute Values	☐	None
Comparable Total	☒	Ascending
Awarded Total	☐	None

Options

Location:

☐ Top
 ☒ Bottom

OK

Cancel

6. Select **OK**.

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

Cost Breakdown Structure (CBS) Register

Quote Register

Quote Comparison & Award - Resources

Drag columns here to group

Find:

Search For...

—

Saved views:

Previous View

Resource Code	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor 1 Asphalt Materials	Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
MAAM	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	\$31.50	\$35.70	\$34.13	\$34.13
MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	\$7.25	\$7.35	\$8.19	\$8.19
MPP10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	\$12.60	\$13.65
MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	\$25.20	\$22.05
MPC36	Pipe 36" PVC SDR35	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	\$31.50	\$32.55
Scope Items										
Summary										
Minority Type										DBE
Notes										
Quoted Total						\$1,406,973.75	\$0.00	\$1,406,973.75	\$271,471.20	\$1,540,798.35
Comparable Total						\$1,406,973.75	\$1,406,973.75	\$1,540,798.35	\$1,540,798.35	\$1,540,798.35

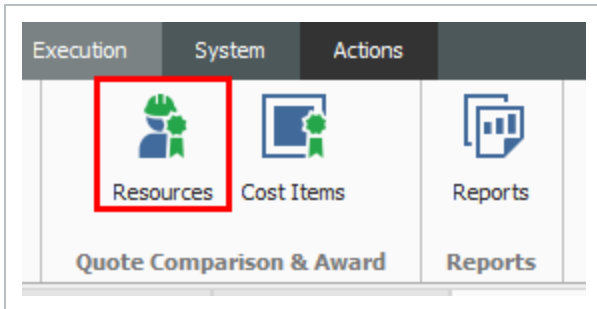
OK

Cancel

STEP BY STEP – COMPARE AND AWARD QUOTES

This exercise walks through a specific example using the Training Job.

1. From the main Estimate landing page select **Quote>Quote Comparison & Award**.
2. Select **Resources** on the Quote Comparison & Award ribbon.



3. Under Quote Groups, select **Aggregates**.
4. Review the quotes to determine the lowest bidder:
 - MDIRTB is marked as Free for Example Vendor 4 and their quote is not splittable.
 - Vendor 2 Stan Mark did not give a quote for MDIRTB, so a substitute value is being used.
5. Vendor 2 has the lowest comparable amount for MBR Aggregate Base Rock and Vendor 1 has the lowest comparable amount for MDIRTB, so you decide to award each respectively. Award each of them by right-clicking on the value and selecting **Award**.
6. On the attention prompt click **Yes**.

STEP BY STEP – MANAGE AND AWARD SCOPE ITEMS

This exercise walks through a specific example using the Training Job.

1. Click the **Quote** tab and then click the **Quotes** icon to open the Quote register.
2. Open the Quote Record for HD Engineering Group and enter a Unit Price of **3,500** which is based on the quote you received.
3. Select the **Special Terms & Conditions** tab and select the **Seller's Special Terms & Conditions** radio button.
4. Assuming the 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
5. Type **150** in the Amount field for Electrical Equipment.
 - Notice how the 3 scope items you just excluded are now added to the Special Conditions total for the quote.
6. Click **Next** to move to the other Quote record for Architectural Designs.
7. Enter a Unit Price of **3,700**.
8. Press **Tab** to move to the **Special Terms & Conditions** tab and select the **Seller's Special Terms & Conditions** (at right) radio button.
9. Uncheck the inclusions checkbox for **Surveying and Layout**.
10. Add the amount **500**.
11. Click **Ok**.
12. Select the **Quote** tab.
13. Open the **Quote Comparison and Award** form, and select the **Cost Items** tab.
14. Under Quote Groups, select **Electrical work**.
15. Right-click on the quoted amount for Architectural Design and select **Award** to award the work to them.
16. Click **Yes** on the resulting prompt to mark the quote group as reviewed.

LESSON 9 - REPORTING

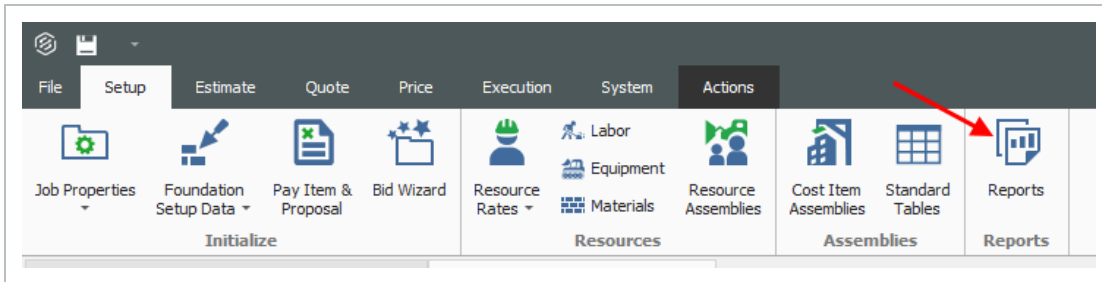
STEP BY STEP – GETTING TO THE REPORTS MENU

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

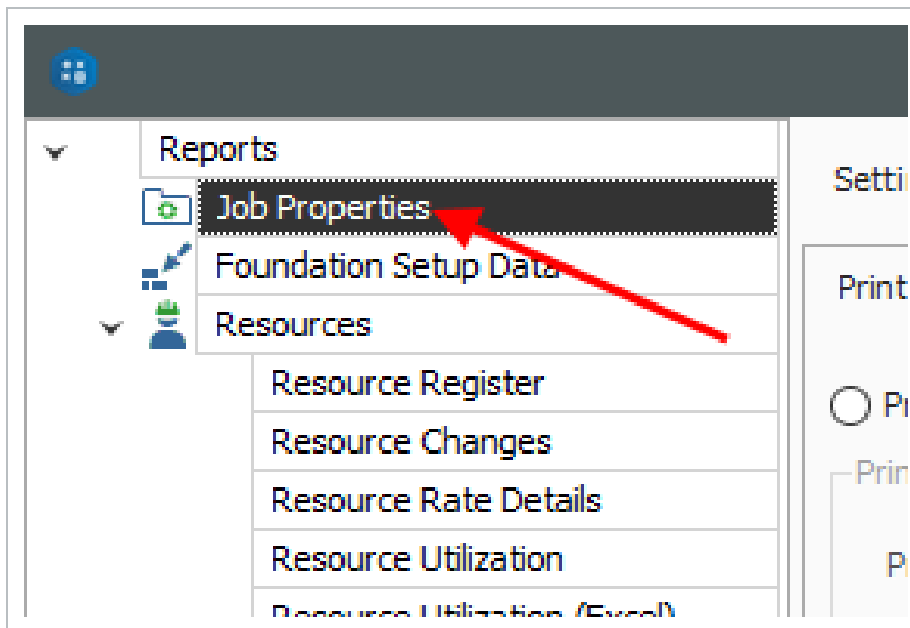
TIP

You can access the Reports menu from the Setup, Estimate, Quote, Price, and Execution tabs.

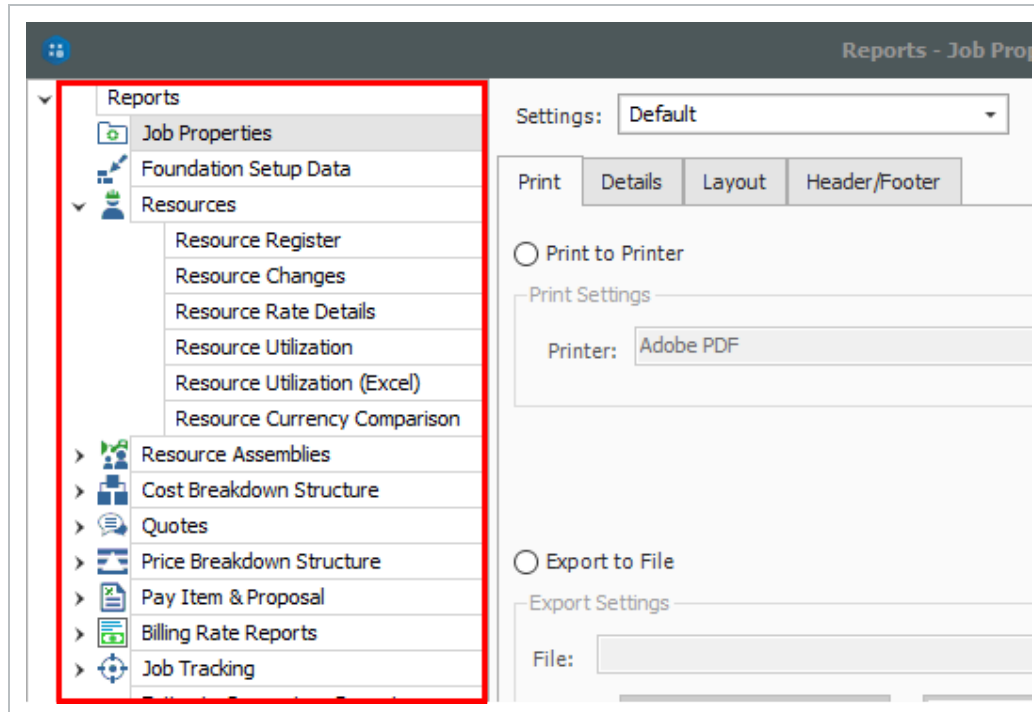
2. Select **Reports**.



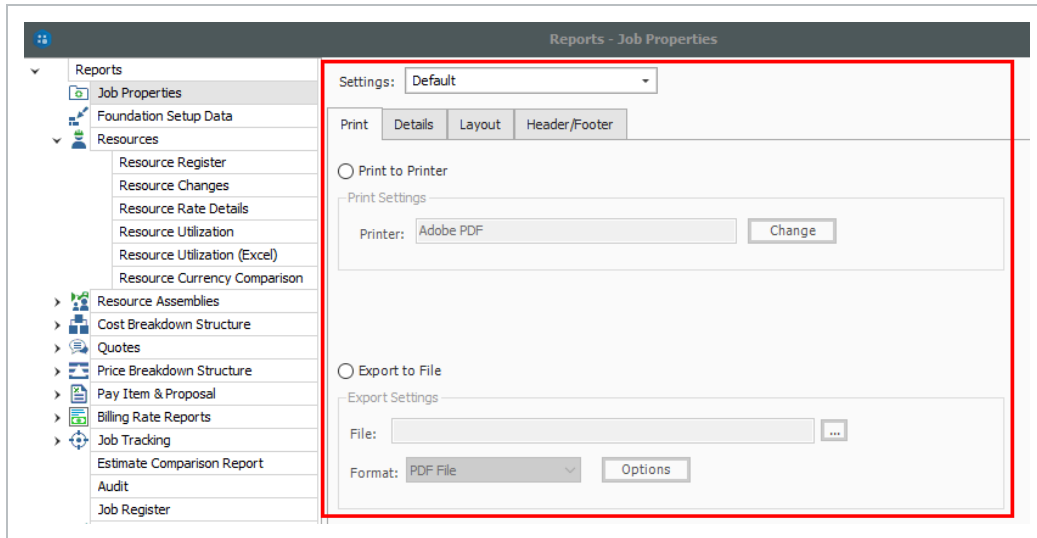
3. Here you select the Report of your choice. For this example, select the first option, **Job Properties**.



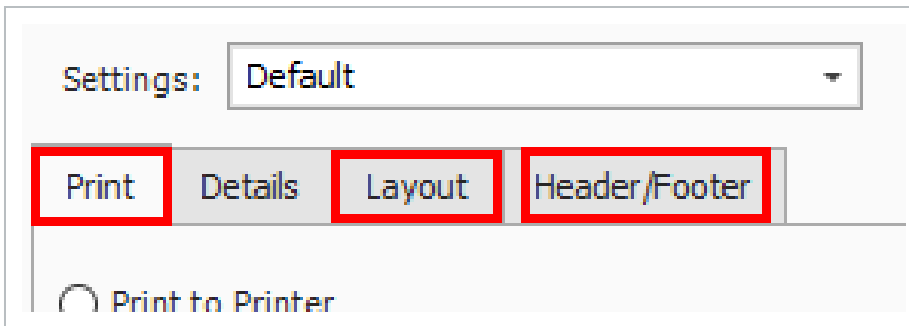
- You will see a split screen with the reports available on the left side bar
- The side bar on the left of the Reports form contains a “tree” of all InEight Estimate adjustable reports



- 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



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



- 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

Audit

Job Register

>  Library Module

Custom Reports

Saved Views

> Budget Exports

> Schedule Exports

> Timesheet Exports

> Timesheet Imports

Master Layout Settings

Master Header/Footer Settings

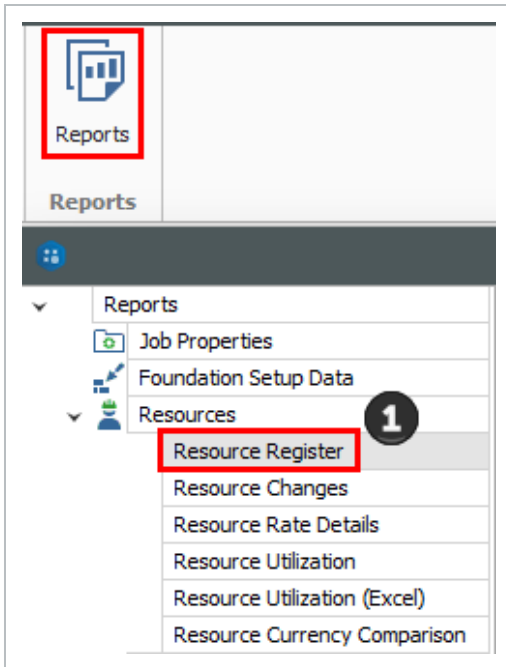
Format: PDF File 

Options

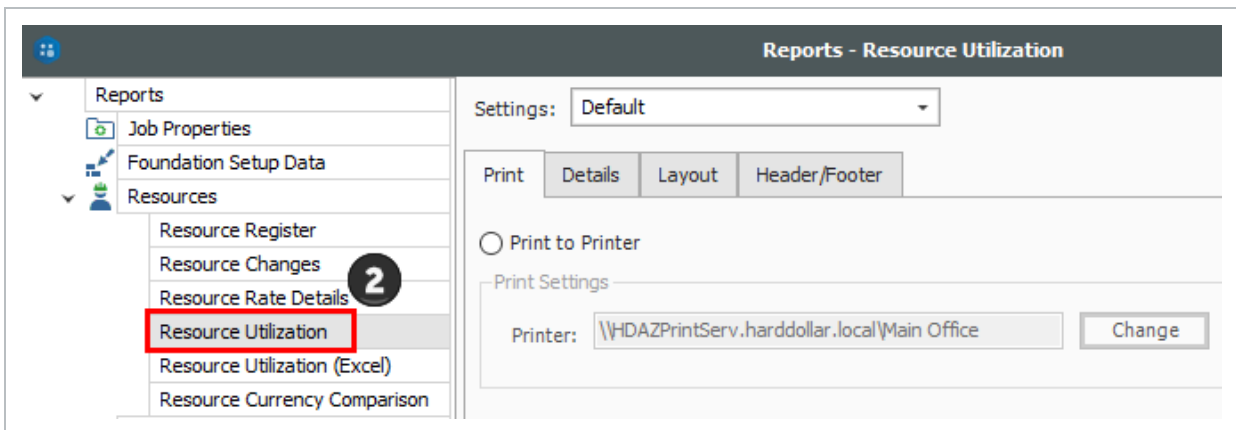
☒ Preview

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**.



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

The screenshot shows a software dialog box with four tabs: **Print**, **Details**, **Layout**, and **Header/Footer**. The **Print** tab is selected and highlighted with a red rectangle. Below the tabs, there are two radio button options: **Print to Printer** and **Export to File**. Under **Print to Printer**, there is a **Print Settings** section containing a **Printer:** text box with the value `\\HDAZPrintServ.harddollar.local\\Main Office` and a **Change** button. Under **Export to File**, there is an **Export Settings** section containing a **File:** text box, a **Format:** dropdown menu set to **PDF File**, and an **Options** button. At the bottom left, the **Preview** radio button is selected and highlighted with a red rectangle. A black circle with the number **3** is placed next to the **Preview** button.

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

PrintDetailsLayoutHeader/Footer

4

Settings: Default (Letter, Landscape)

Orientation

Portrait

Landscape

Paper Size: Letter

Font

Header Level 1: Arial Narrow, 8, Bold

Detail Level 1: Arial Narrow, 8, Regular

Header Level 2: Arial Narrow, 8, Bold

Detail Level 2: Arial Narrow, 8, Regular

Margins

Top: 0.50

Header: 0.25

Left: 0.50

Right: 0.50

Bottom: 0.50

Footer: 0.25

Number Format

Decimal Precision

Significant Figures

Cost summary:

2

☐

1

Unit cost:

2

☐

1

Quantity:

2

☐

1

Percent:

2

☐

1

☒ Use thousands separator

☐ Use currency symbol

☐ Show zero values as blank

Currency:

As-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/Footer

Settings: Default

Page Header

Report Header (first page only) **5**

[Report Title] Resource Utilization

[Company Name]

Job Code: [Job Code]

Description: [Job Description]

Report Footer (last page only)

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

Settings: Default **6**

Print Details Layout Header/Footer

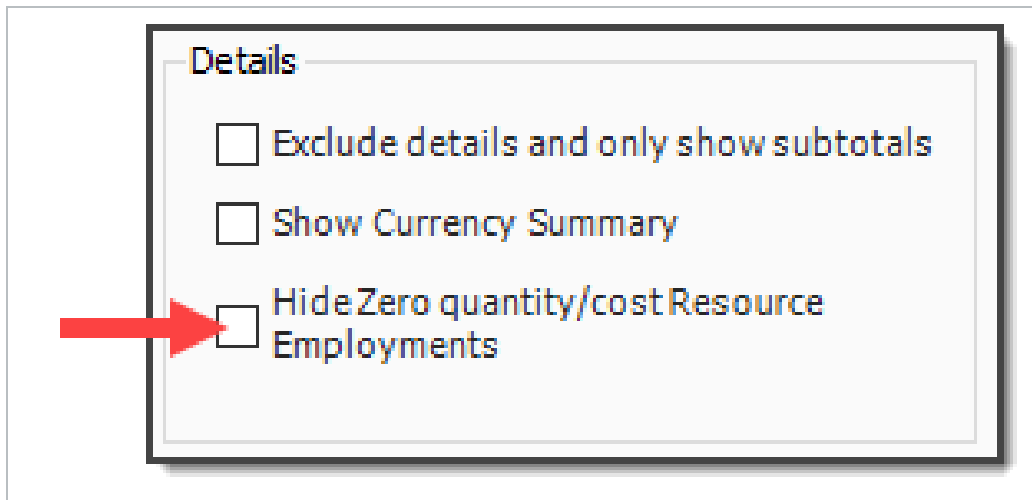
Filter by currency: No Filter **7**

Report Type

☒ Resource Utilization Summary **8**

☐ Resource Utilization Summary 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



- 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.

Group By

☐ Insert page breaks between the outermost groups

Resource Organizational Category 9

< no field selected >

< no field selected >

< no field selected >

< no field selected >

< no field selected >

Resource Type

☒ Labor 10

☒ Construction Equipment

☐ Rented Construction Equipment

☐ Installed Material

☐ Installed Equipment

☐ Supplies

☐ Unique

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

Columns

☐ Show Currency column

☐ Show plug rate for non-hourly resources

☐ Show tax separately from plug rate for non-hourly resources

☐ Show hours for non-hourly duration driven resources

Details

☐ Exclude details and only show subtotals

☐ Show Currency Summary

- This is just one of many ways to organize and adjust your report.

11. Click **Run** to run the report.

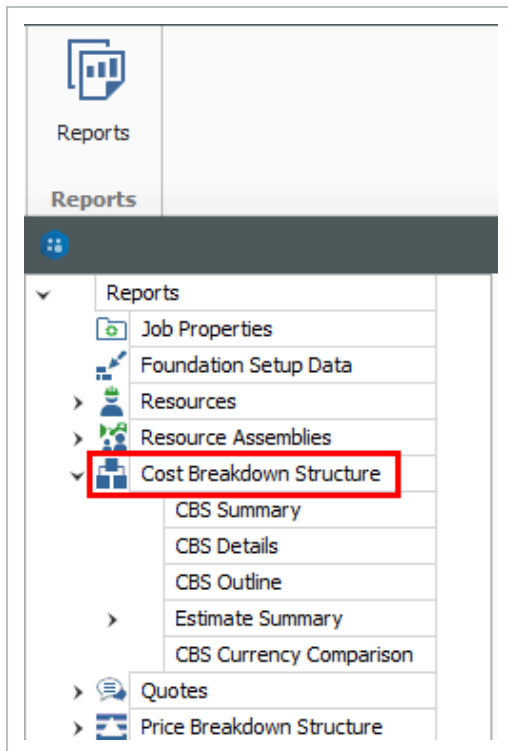
- This report can be helpful for seeing your utilization hours, broken down by regular time and overtime hours

12. Click the red **X** to close this page and open the Construction Equipment page.

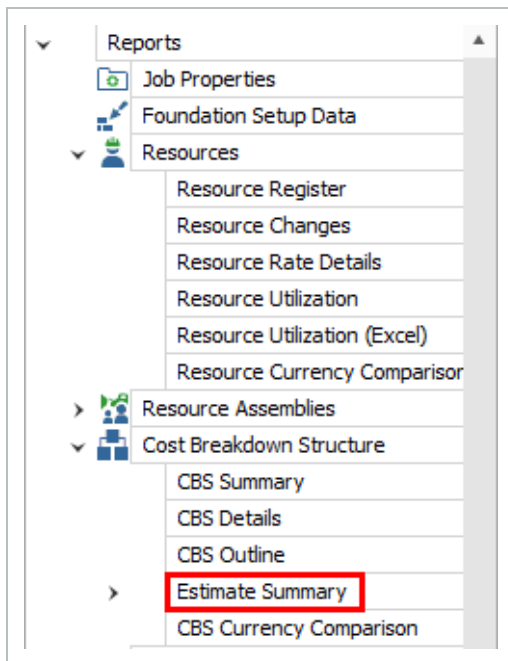
13. Click the red **X** to close the Construction Equipment report.

STEP BY STEP – CONFIGURE REPORT OUTPUT SETTINGS (REPORT 2)

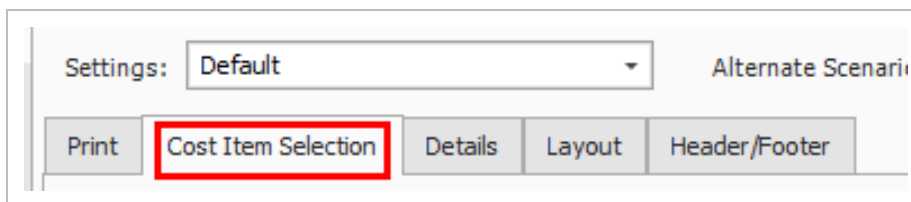
1. Open the **Training Job** and select **Setup >Reports**, then expand the **Cost Breakdown Structure** node.



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.



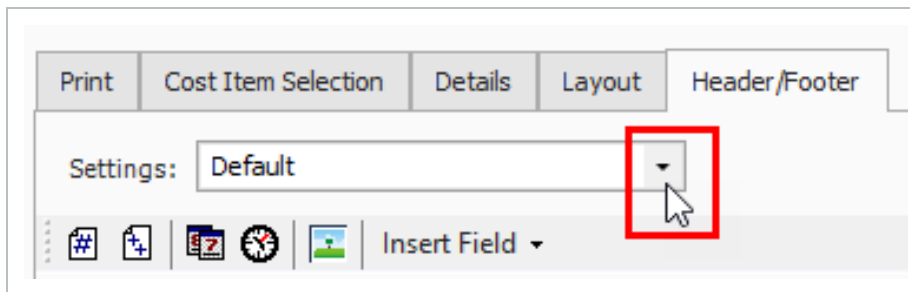
4. The Cost Item Selection tab allows you to report on a selection of cost items:
 - Print a contiguous range of cost items: Allows you to print a series of cost items in a row. In this case, print just items: select 4.1 in the From field and 4.3.2 in the To field.
 - Select cost items to print from 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**.

The screenshot shows the 'Details' tab of the Estimate Training Manual interface. The 'Fields' section is highlighted with a red box and a circled '6', showing 'Cost item production field 1' set to 'Days' and 'Cost item production field 2' set to 'Man-Hours/UM'. The 'Resource Types' section is also highlighted with a red box and a circled '7', showing 'Labor', 'Construction Equipment', 'Installed Material', and 'Resource Assemblies' selected.

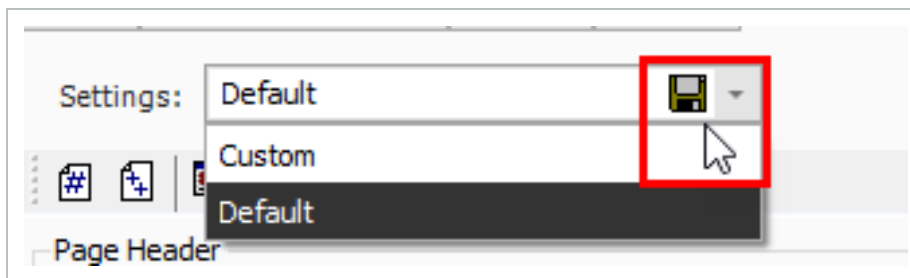
8. Leave the rest of the settings at their defaults, then select the **Header / Footer** tab.
9. In the center **Page Footer** field delete the existing text, then type **Confidential –Internal Use Only**.

The screenshot shows the 'Page Footer' section of the Estimate Training Manual interface. The 'Page Footer' section is highlighted with a red box, showing the text 'Confidential - Internal Use Only' in the center field.

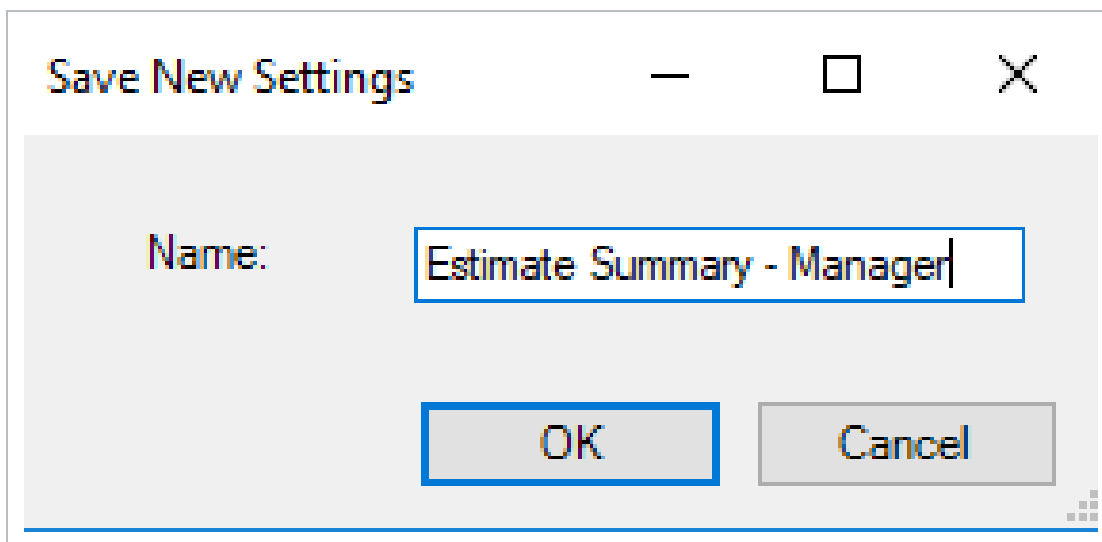
10. To save the settings you've configured, click on the **Settings** drop-down arrow above the output setting tabs.



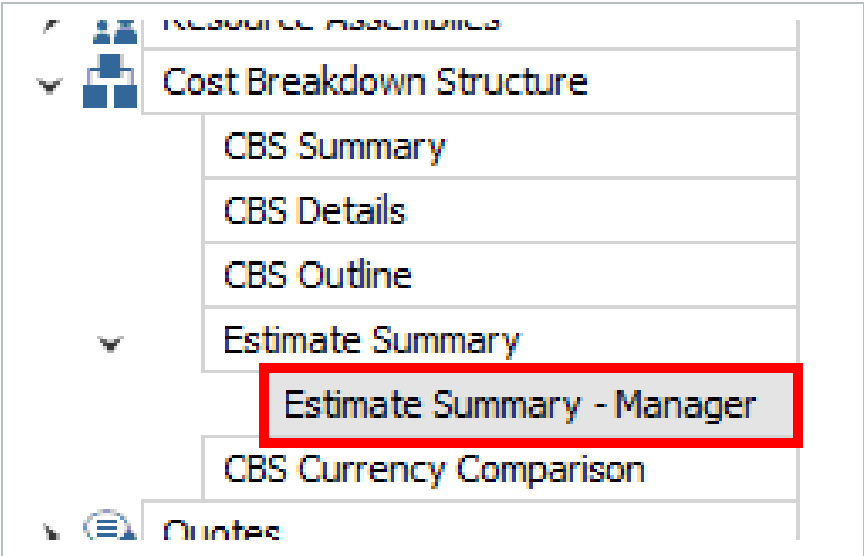
11. Select the **Save disk**  icon to save the new settings.



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

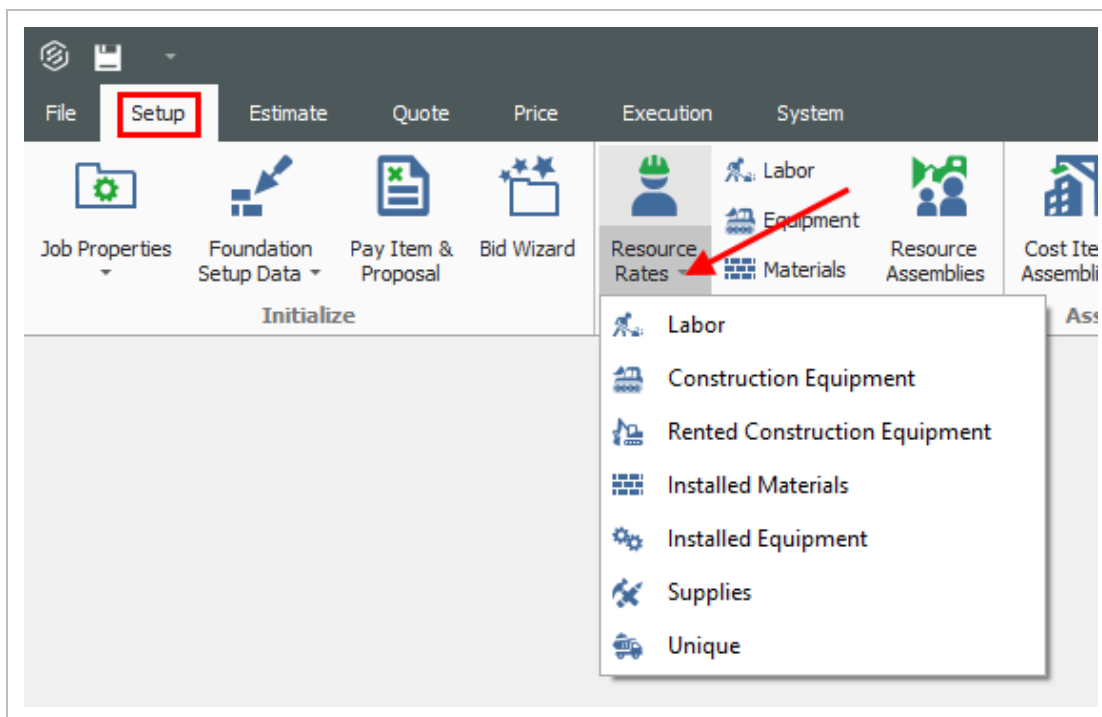


- Notice that a custom version of the report now displays under Estimate Summary on the Reports tree on the left

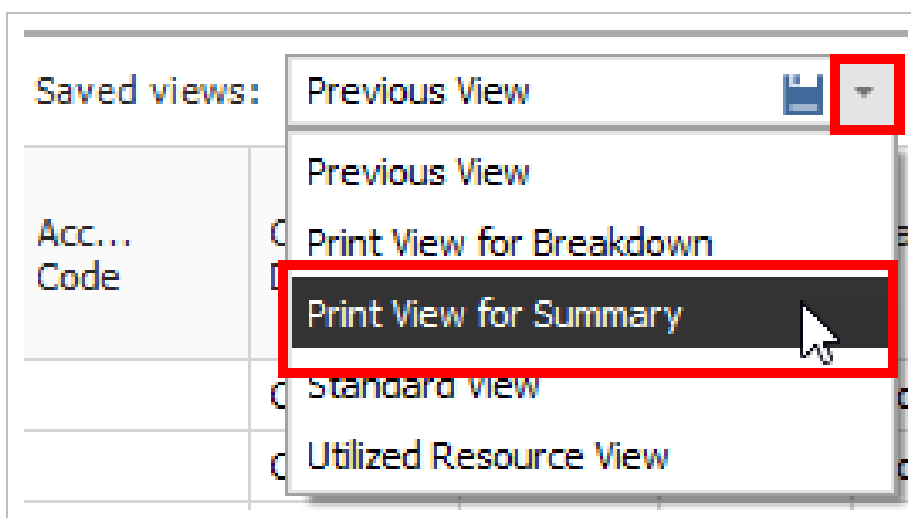


STEP BY STEP – CREATE A REGISTER REPORT

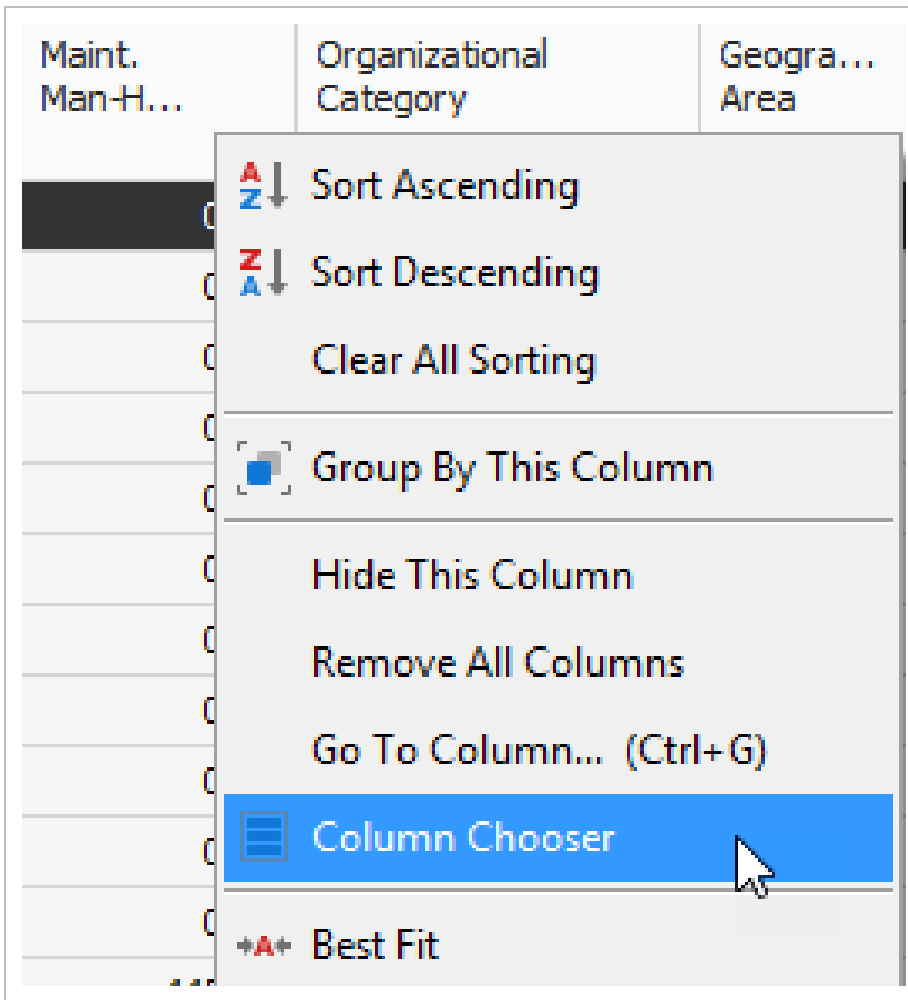
1. Open the **Training Job** and select **Setup** tab, then select the **Resource Rates** drop-down list.



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.

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

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

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.

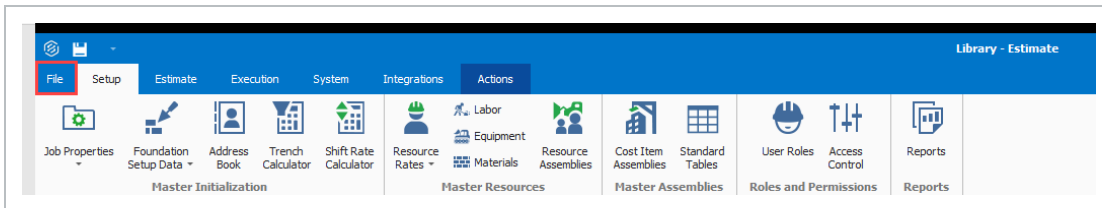
Labor Register						
INEIGHT - PAUL TRIPPI						
E101 - Training Job KL--Sample Training Job						
Resource Code	Description	Utilization Count	Unit of Measure	Unique Sales Tax	Minority Percent	Maint. Man-Hour Factor
L01	Operator Class 1	680.00	Hour	0.00	0.00	0.00
LL2	Laborer	590.00	Hour	0.00	0.00	0.00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

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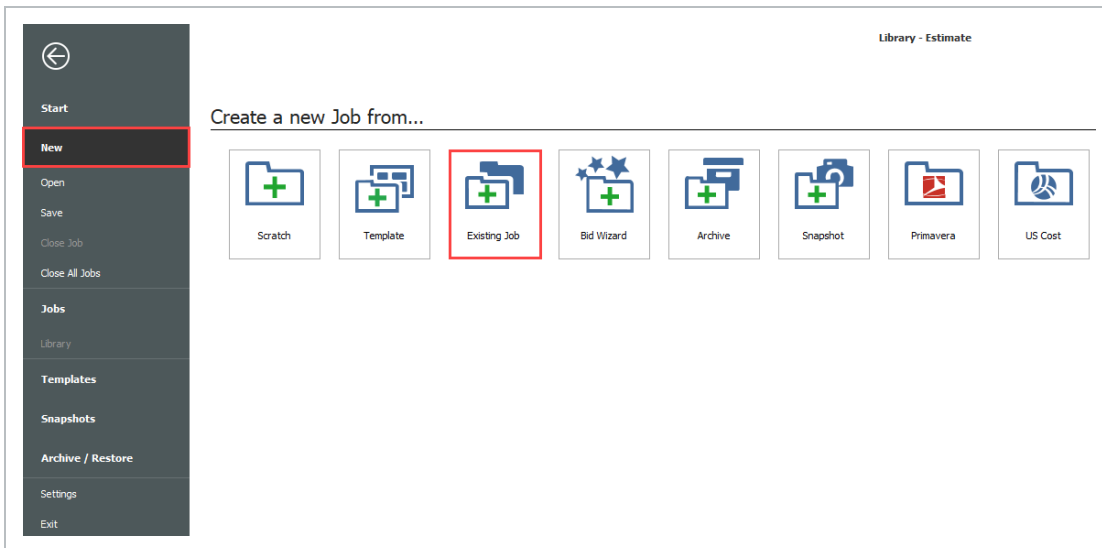
LESSON 10 - DATA REPRODUCTION

STEP BY STEP – COPY AN EXISTING JOB

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



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



3. The Job Register displays a list of your existing projects; select the Training Job and click **OK**.
4. On the New Job dialog, click the **ellipses** and select a Core Project.
5. In the Code field, type **Infra Job Copy** with your initials.
6. 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.
7. Uncheck the check for copying the PBS Changes Log, Copy Quotes and Auto-Update Job in Connected Analytics.
 8. Click **OK** to create the new job.

New Job from '190002-1'

Core Project: * 104257

Code: * Infra Job Copy

Description: Infra Job Copy

☒ Copy Cost Details

☐ Copy PBS Changes Log

☐ Copy Quotes

☐ Auto-Update Job in Connected Analytics

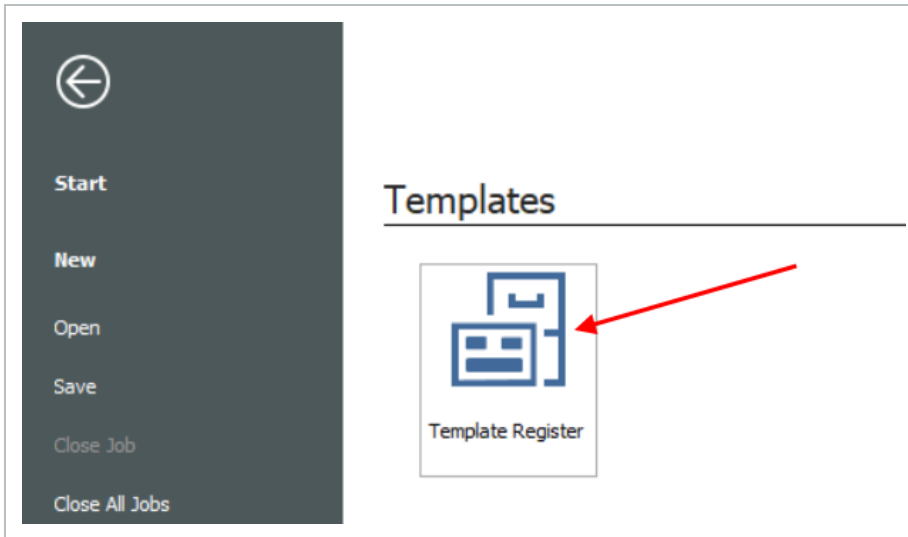
OK Cancel

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.

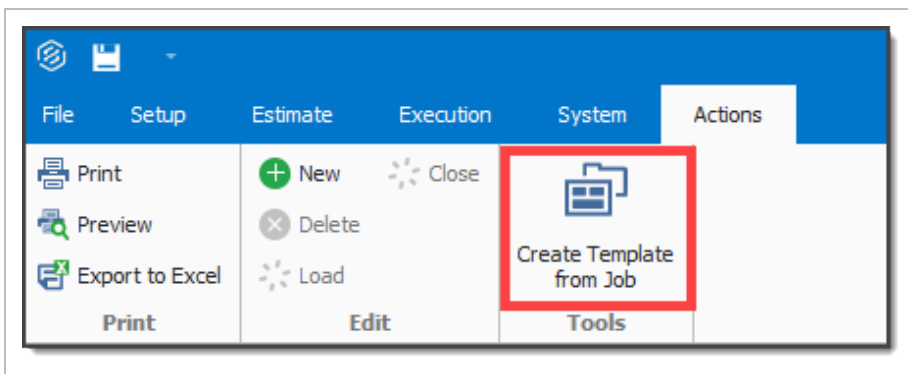
This is a very easy method for creating a new job, and it is a good choice if you want to copy an entire job. However, if you want to pick and choose which parts of a job to duplicate, the Bid Wizard is a better choice.

STEP BY STEP – CREATE A TEMPLATE

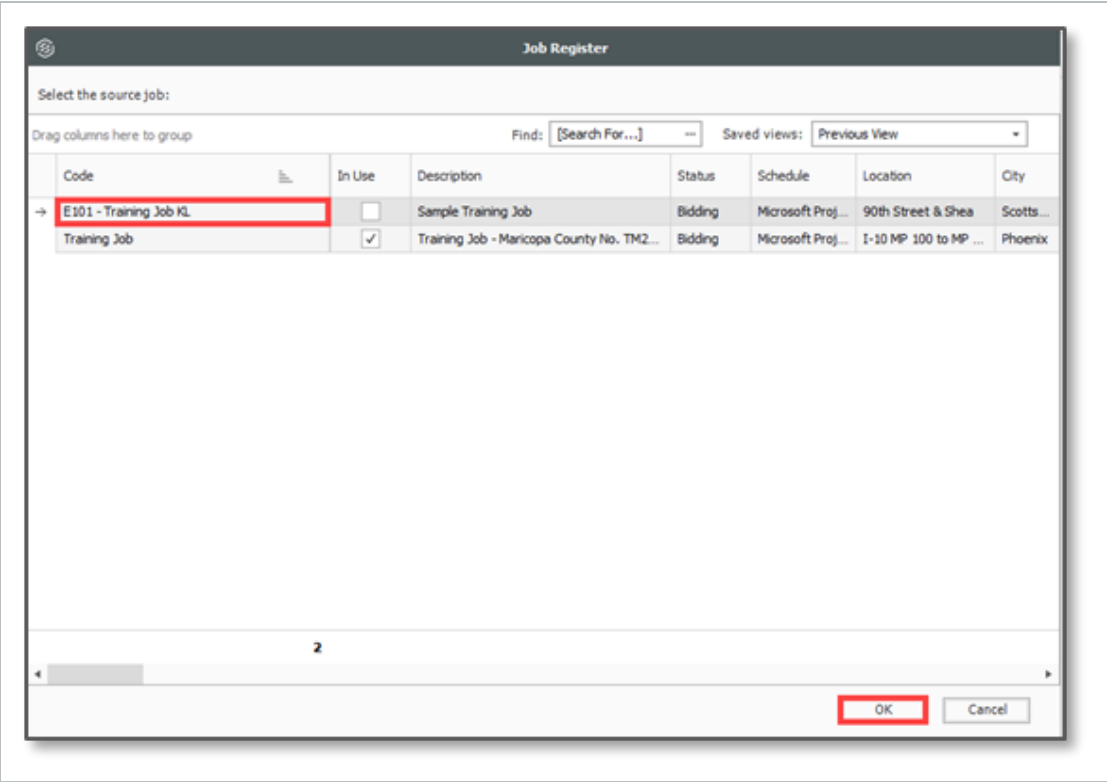
1. Click the **File** tab on the Estimate landing page.
2. From the left side panel, select **Templates**.
3. Under Templates, select the **Template Register**.



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

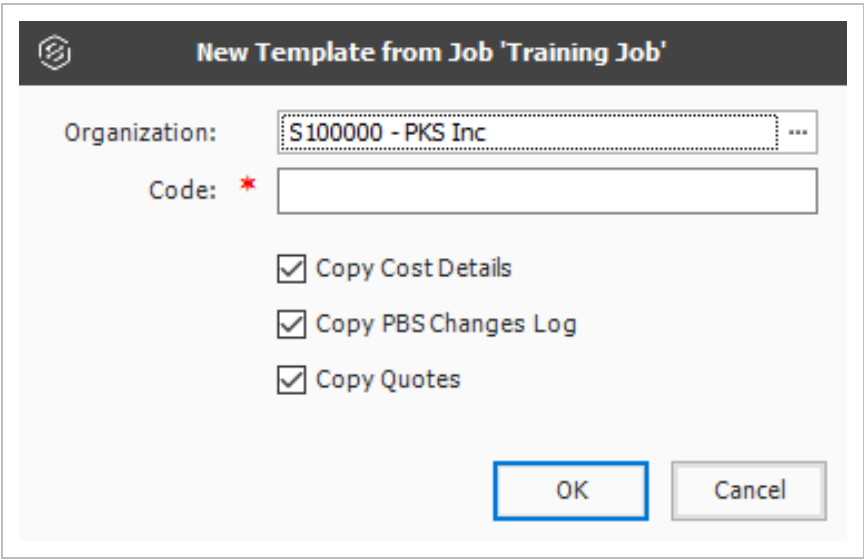


- The Job Register opens for you to select the source job for the template
 - Assume that you want to make a template from your E101 Training Job
5. Select the **E101 Training Job with your initials**, then click **OK**.

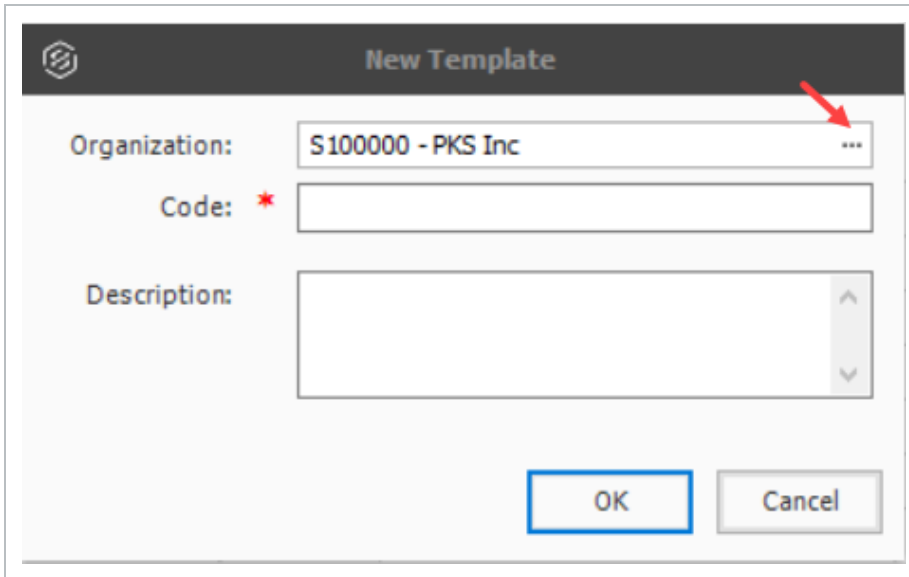


NOTE You cannot create templates from jobs that are published to Job Tracking.

- The New Template From Job 'Training Job' with your initials prompt appears.



6. Click the ellipsis to the right of the Organization field.



New Template

Organization: S100000 - PKS Inc

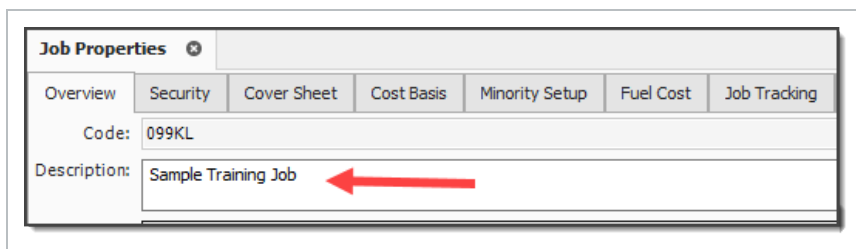
Code: *

Description:

OK Cancel

The Organization Register Library opens.

7. In the Organization Register Library, select an **organization** and then click **OK**.
8. In the Code field, type **Small Project Template[your initials]**.
 - Leave Copy Cost Details and Copy PBS Changes Log checked
9. 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



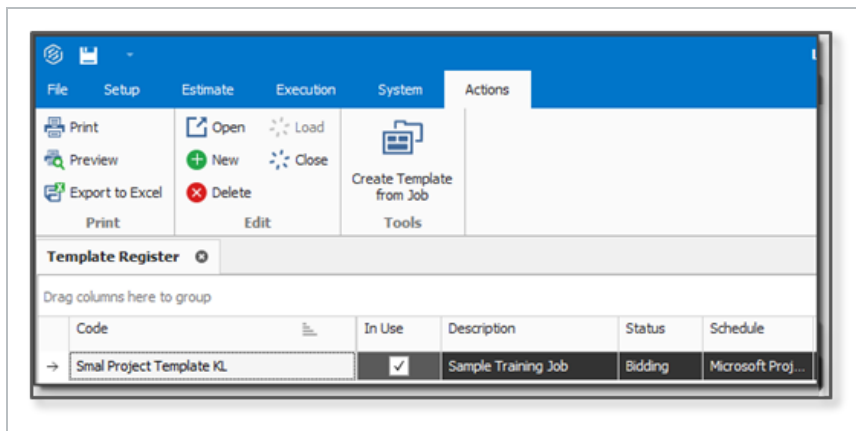
Job Properties

Overview Security Cover Sheet Cost Basis Minority Setup Fuel Cost Job Tracking

Code: 099KL

Description: Sample Training Job

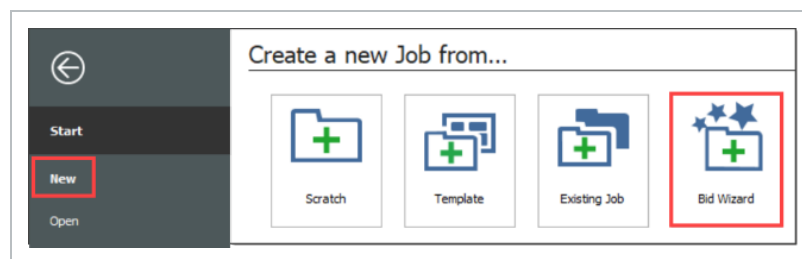
- Back in the Templates Register, you can see the new template created



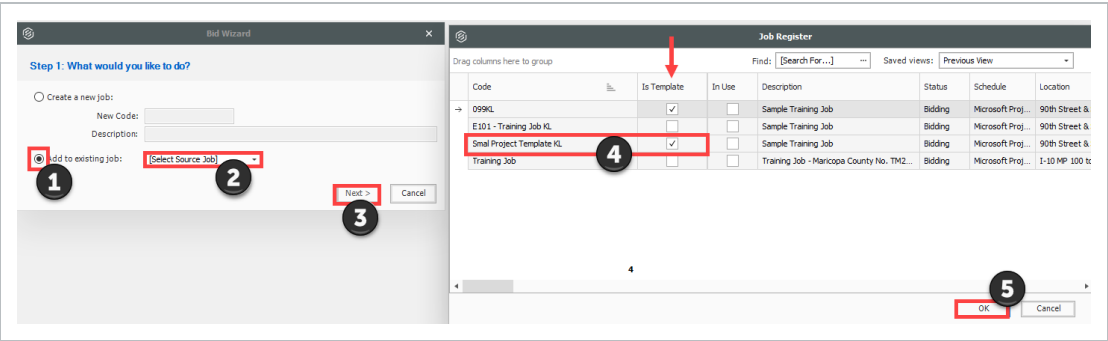
- Similar to copying an existing job, you can create a new job from a template from the New menu in the Backstage View.



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



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

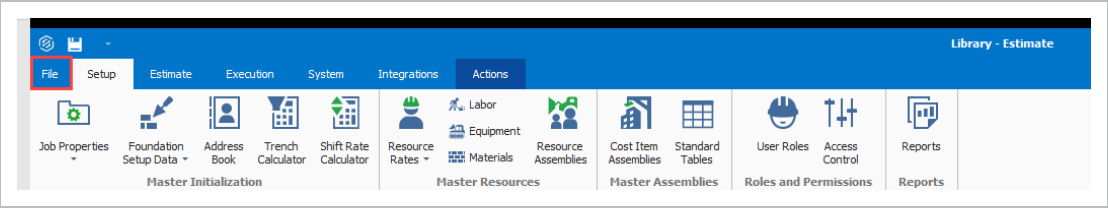


STEP BY STEP – ARCHIVE AND RESTORE A TEMPLATE

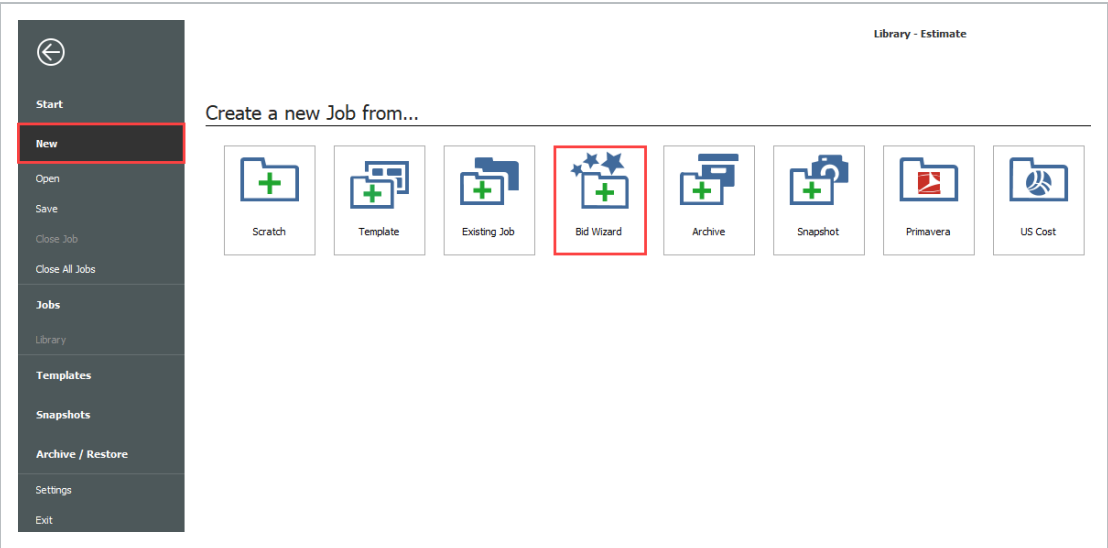
1. Click **File** to open the Backstage View.
2. Select **Archive / Restore**.
 - Several options appear for archiving and restoring your jobs, templates, and library
3. Select **Archive Template**.
 - The Template Register appears
4. Select the **Small Project Template [your initials]** template you 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

STEP BY STEP – USE THE BID WIZARD

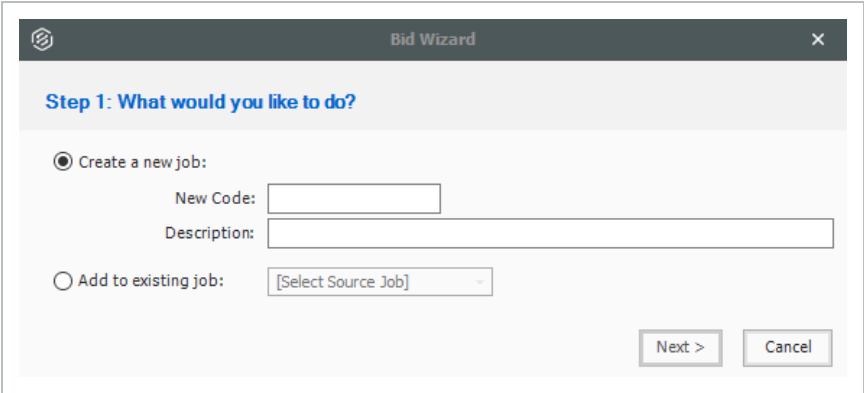
1. To open the Bid Wizard, click the **File** tab on the Estimate landing page.



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



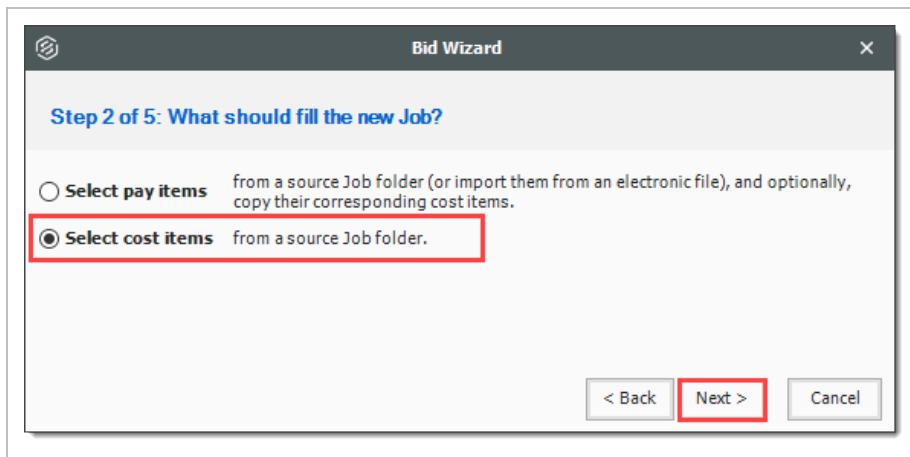
- The Bid Wizard – Step 1 dialog displays



TIP

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**.



- 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.

Bid Wizard
×

Step 3 of 4: What would you like to do?

Job Properties

☐ Copy from MasterJob Properties
 ☒ Copy from source job

Job Properties contains the Overview, Security, Cover Sheet, Cost Basis, Minority Setup and Fuel Cost for the job.

Foundation Setup Data

☐ Copy from Master Foundation Setup Data
 ☒ Copy from source job

Foundation Setup Data contains the Account Codes, Tags, Quote Group Tags, Units of Measure, Currencies, Resource / Assembly Files, Geographic Areas, Wage Zones, Organization Categories and Weather Tags.

Resources and Resource Assemblies

Copy utilized Resources and Resource Assemblies from source job
 ☒ Also copy all non-utilized resources

Resources and Resource Assemblies that are utilized by Cost Items in the source job(s) are copied by default. Optionally, all Resources and Resource Assemblies can be copied from the source job(s) into the new job.

Unassigned Cost Items and Markup

☐ Copy from Master CBS
 ☒ Copy from source job
 ☒ Copy Markup

Unassigned Cost Items are those cost items in the CBS that are not assigned to specific pay items, including Prime Bond, Job Financing, General Expense, and others.

Workbook

☐ Copy from Library
 ☒ Copy from source job

The workbook contains data that is used to link fields in Estimate to cells in Excel. The workbook containing the data that you want to use for linking with Excel can be copied from the Library or the source job.

< Back

Next >

Cancel

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

Step 4 of 4: Choose the source Cost Items to copy.

Source Job: [Select Source Job]

Drag columns here to group Find: [Search For...] Saved views: Standard View

Include	CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity
---------	-------------------	-------------	---------------	-------------------------

Toggle Include All < Back Finish Cancel

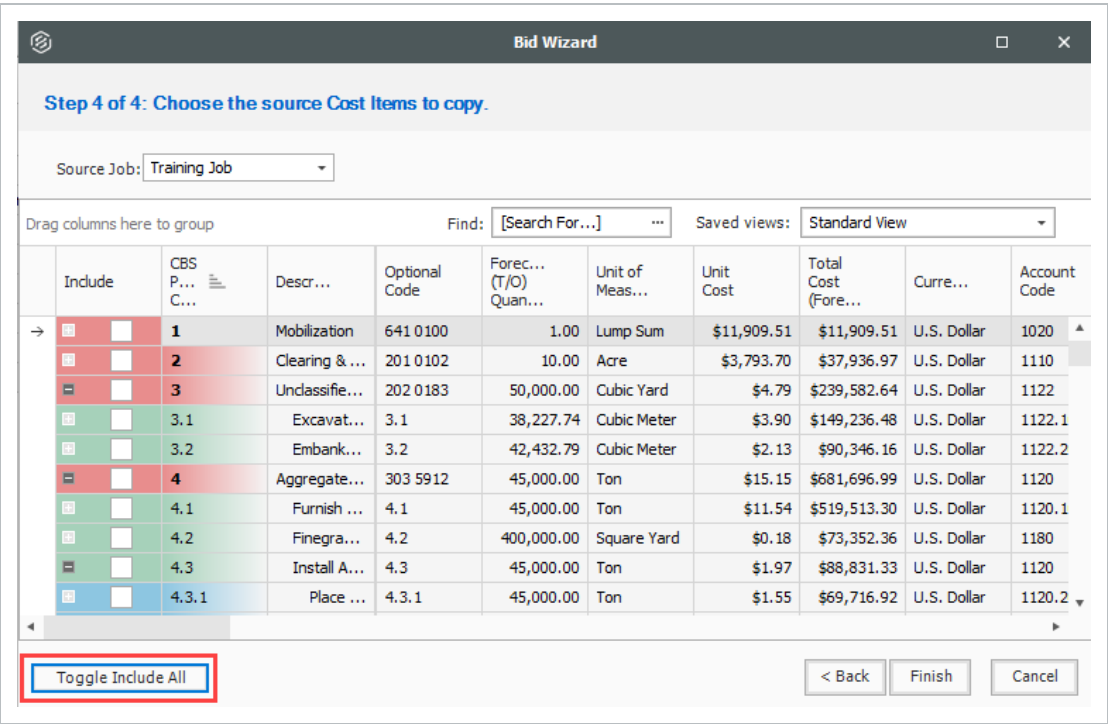
- The Job Register opens

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.



- 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

Bid Wizard

Step 4 of 4: Choose the source Cost Items to copy.

Source Job: Training Job

Drag columns here to group Find: [Search For...] Saved views: Standard View

Include	CBS P... C...	Descr...	Optional Code	Forec... (T/O) Quan...	Unit of Meas...	Unit Cost	Total Cost (Fore...	Curre...	Account Code
☒	1	Mobilization	641 0100	1.00	Lump Sum	\$11,909.51	\$11,909.51	U.S. Dollar	1020
☒	2	Clearing & ...	201 0102	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

Toggle Include All < Back Finish Cancel

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.**

Attention

You have ordered one or more cost items to be copied by the Bid Wizard.

Do you want to adjust Pay Rules and Shift Arrangements of the copied cost items?

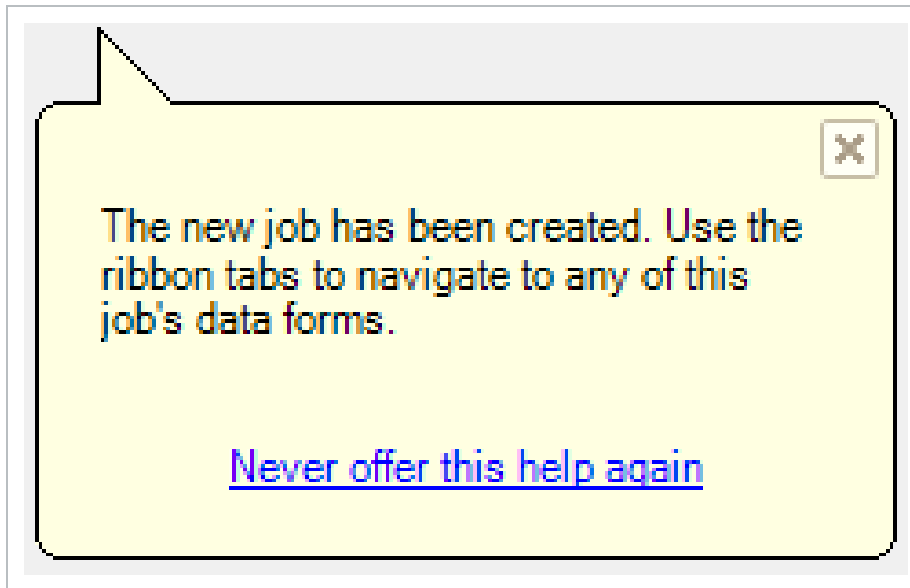
☐ Keep the original pay rules and shift arrangements

☒ Adjust the pay rules and shift arrangements to match the destination

☐ Never ask me this question again

OK

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 **X** in the upper right corner.

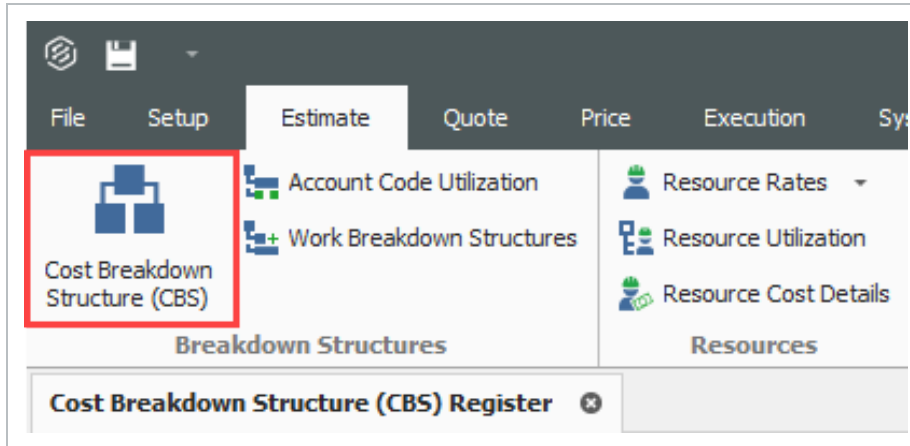


21. Open the **Estimate > CBS** to see the three cost items that were brought in.

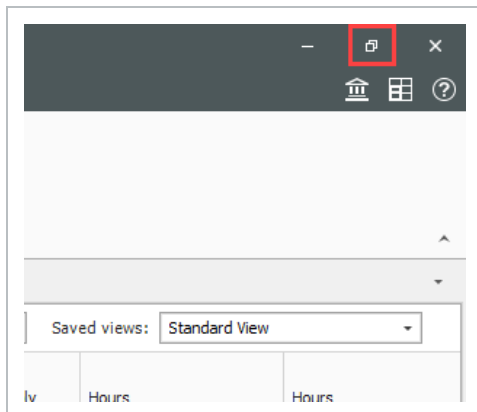
Cost Breakdown Structure (CBS) Register					
Drag columns here to group					
	CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure
→		JOB		1.00	Lump Sum
+		Prime Bond	PRIME BOND	1.00	Lump Sum
+		Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum
+		Job Financing	FINANCE 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 0100	1.00	Lump Sum
+ 2		Clearing & Grubbing	201 0102	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

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.



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

CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
+	JOB		20.00	Mile	\$3,635,147...	\$72,662,954...
+	Prime Bond	PRIME BOND	1.00	Lump Sum	\$47,119.07	\$47,119.07
+	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$295,371.61	\$295,371.61
+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.00
+	Indirect Cost Escalation	INDIRECT COST ESCAL...	1.00	Lump Sum	\$0.00	\$0.00
+	Direct Cost Escalation	DIRECT COST ESCALAT...	1.00	Lump Sum	\$19,131.77	\$19,131.77
+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54
+	Job Management & Equipment	JOB MANAGEMENT & E...	1.00	Lump Sum	\$125,896.28	\$125,896.28
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00
+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,203.16	\$104,203.16
+	1 Mobilization	641 0100	2.00	Lump Sum	\$11,909.51	\$23,819.02
+	2 Clearing & Grubbing	201 0102	10.00	Acre	\$3,793.70	\$37,936.97
+	3 Unclassified Excavation	202 0183	50,000.00	Cubic Yard	\$4.94	\$246,901.12
+	3.1 Excavation	3.1	38,227.74	Cubic Meter	\$4.10	\$156,554.96
+	3.2 Embankment	3.2	42,432.79	Cubic Meter	\$2.13	\$89,346.16
+	4 Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$681,696.99

5. 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	Fineregrade Subgrade 4.2
+	4.3	Install Aggregate Base 4.3
+	4.3.1	Place Aggregate Base 4.3.1
+	4.3.2	Blue Top Aggregate Base 4.3.2

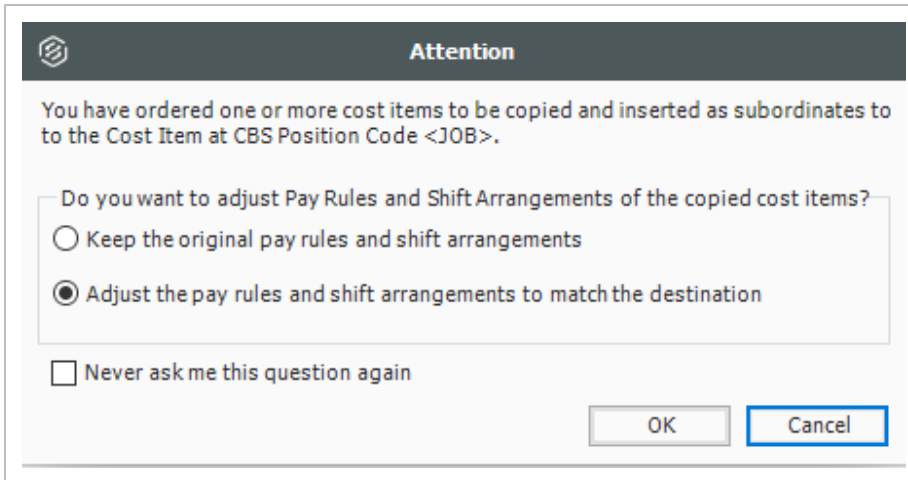
TIP

When you copy a superior cost item, all of its subordinates are automatically copied.

6. On the CBS of the E101 Bid Wizard job, click the row header on the first blank register row, and press **Ctrl+V** to paste the cost item.

+	1	Mobilization	641 0100	1.00	Lump Sum
+	2	Clearing & Grubbing	201 0102	10.00	Acre
+	3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard
+	3.1	Excavation	3.1	38,227.74	Cubic Meter
+	3.2	Embankment	3.2	42,432.79	Cubic Meter
→					

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



- 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

CBS Position Code	Description	Really Optional Code	Forecast (T/C) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
JOB	PRIME BOND	PRIME BOND	20.00	Mile	\$3,633,147.00	\$72,662,954.00
1	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$47,119.07	\$47,119.07
2	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$295,371.61	\$295,371.61
3	Indirect Cost Escalation	INDIRECT COST ESCALATION	1.00	Lump Sum	\$0.00	\$0.00
4	Direct Cost Escalation	DIRECT COST ESCALATION	1.00	Lump Sum	\$19,131.77	\$19,131.77
5	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54
6	Job Management & Equipment	JOB MANAGEMENT & EQUIPMENT	1.00	Lump Sum	\$125,896.28	\$125,896.28
7	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00
8	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,203.16	\$104,203.16
9	1 Mobilization	641 0100	2.00	Lump Sum	\$11,909.51	\$23,819.02
10	2 Clearing & Grubbing	201 0102	10.00	Acres	\$2,793.70	\$27,936.97
11	3 Unclassified Excavation	302 0183	50,000.00	Cubic Yard	\$4.94	\$246,901.12
12	4 Excavation	311	38,227.74	Cubic Meter	\$4.10	\$156,554.96
13	5 Embankment	312	42,432.79	Cubic Meter	\$2.13	\$90,346.16
14	6 Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$683,696.99
15	7 Furnish & Haul Base Material	4.1	45,000.00	Ton	\$11.54	\$515,513.30
16	8 Finegrade Subgrade	4.2	400,000.00	Square Yard	\$0.18	\$72,352.36
17	9 Install Aggregate Base	4.3	45,000.00	Ton	\$1.97	\$88,831.33
18	10 Place Aggregate Base	4.3.1	45,000.00	Ton	\$1.55	\$69,745.92
19	11 Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.05	\$19,114.42
20	12 Asphalt Concrete Hot Mix Type A	303 4263	35,000.00	Ton	\$42.62	\$1,491,980.59

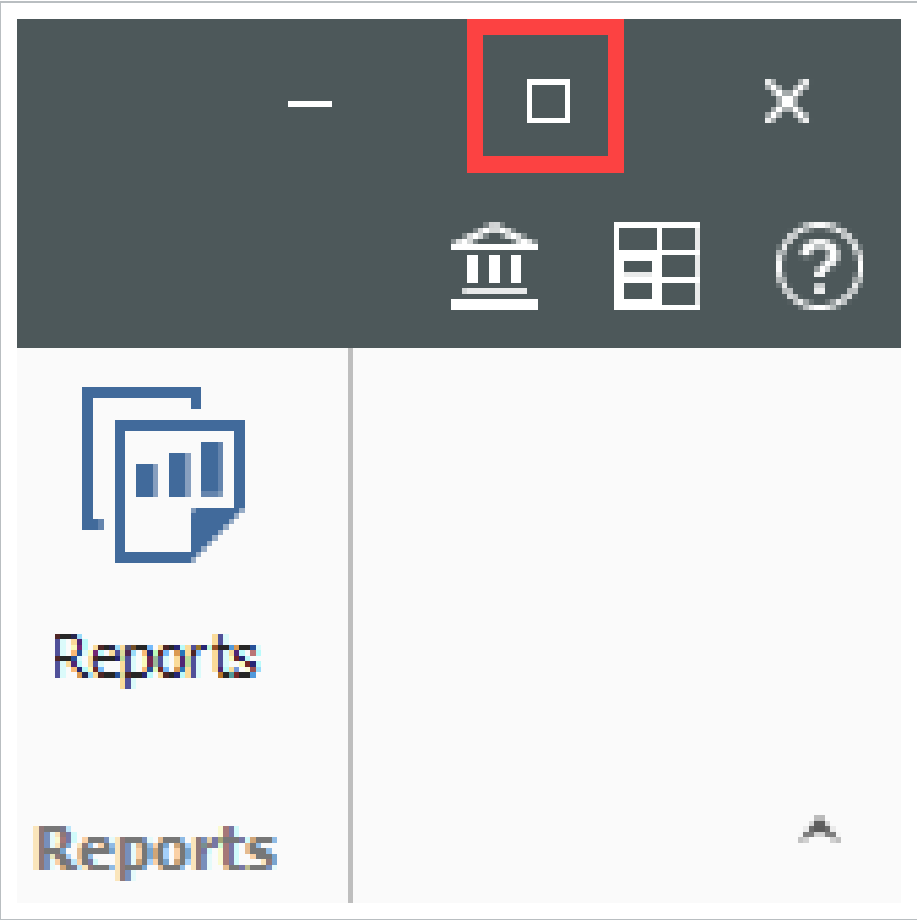
TIP

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

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

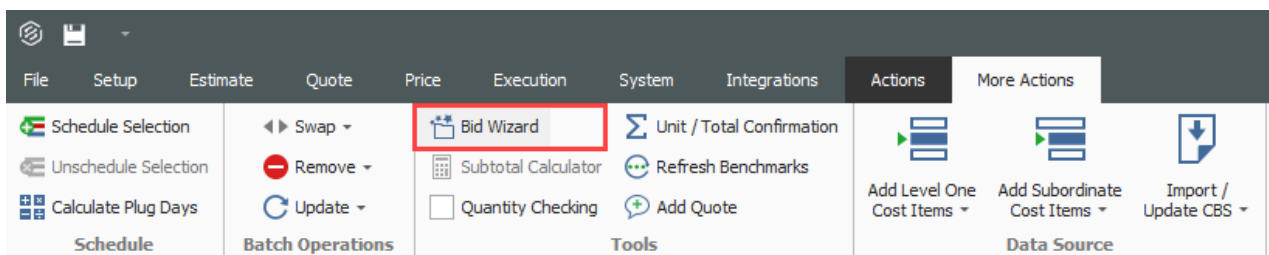


STEP BY STEP – USE THE CBS BID WIZARD

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.

4	Aggregate Base	303 5912	45,000.00	Ton
+ 4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton
+ 4.2	Finergrade Subgrade	4.2	400,000.00	Square Yard
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
5	New		1.00	Each

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



- 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.

Drag columns here to group Find: [Search For...] ... Saved views: Previous View

	CBS Position Code	Description	Really Optional Code	Unit of Measure	Forecast (T/O) Quantity
	4.2	Finegrade Subgrade	4.2	Square Yard	
	4.3	Install Aggregate Base	4.3	Ton	
	4.3.1	Place Aggregate Base	4.3.1	Ton	
	4.3.2	Blue Top Aggregate Base	4.3.2	Square Yard	
→	5	Asphalt Concrete Hot Mix Type A	303 4263	Ton	
	5.1	Furnish & Haul Hot Mix	5.1	Ton	
	5.2	Install Hot Mix Type A	5.2	Ton	
	6	36 Inch RCP Culvert Class III	413(B) 0464	Linear Feet	
	6.1	Furnish RCP Materials	6.1	Linear Feet	
	6.2	Excavate RCP Trench	6.2	Cubic Yard	
	6.3	Install RCP Pipe	6.3	Linear Feet	
	6.4	Backfill RCP Pipe	6.4	Cubic Yard	

OK Cancel

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

You have ordered one or more cost items, or just their details, to be copied by the Bid Wizard.

Do you want to adjust cost items and cost details based on the destination pay rules?

☐ Do not make adjustments

☒ Make adjustments 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 original pay rules and shift arrangements

☒ Adjust the pay rules and shift arrangements to match the destination

☐ Never ask me this question again

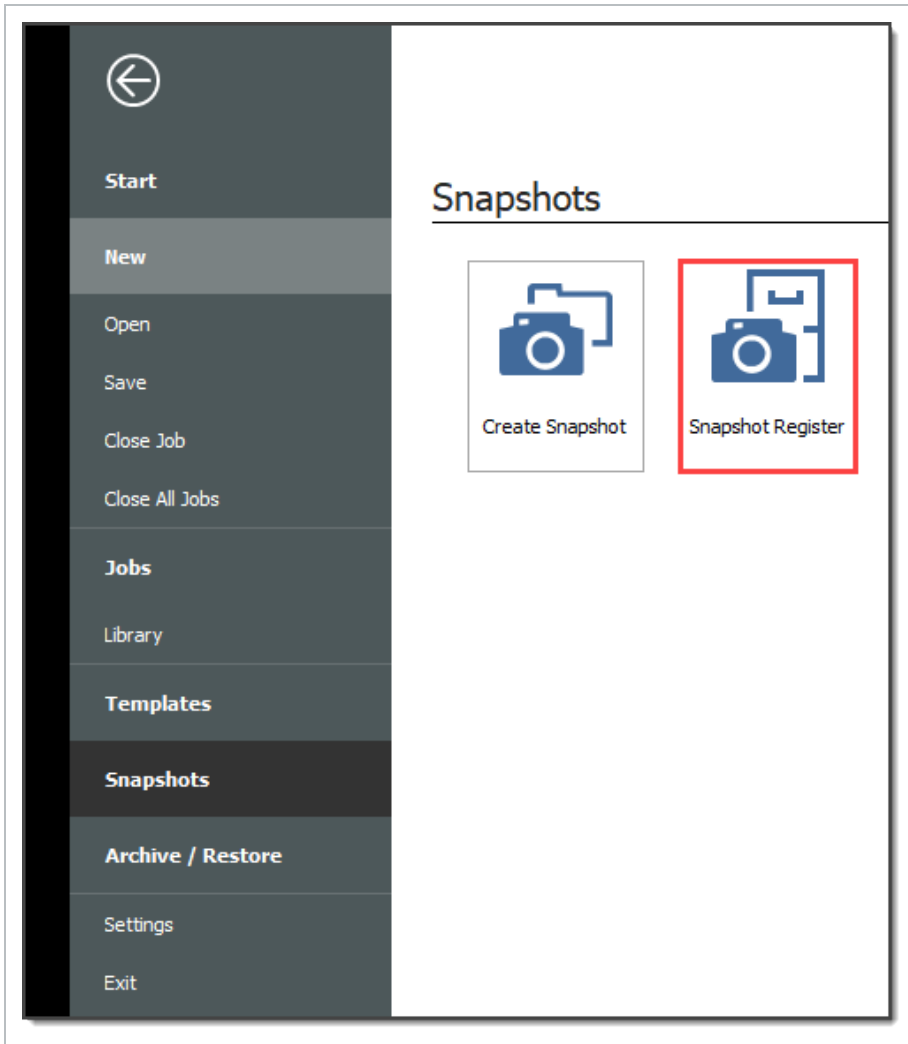
OK Cancel

- 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
  5	Asphalt Concrete Hot Mix Type A		1.00	Each
+ 5.1	Furnish & Haul Hot Mix	5.1	1.00	Ton
+ 5.2	Install Hot Mix Type A	5.2	1.00	Ton

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.



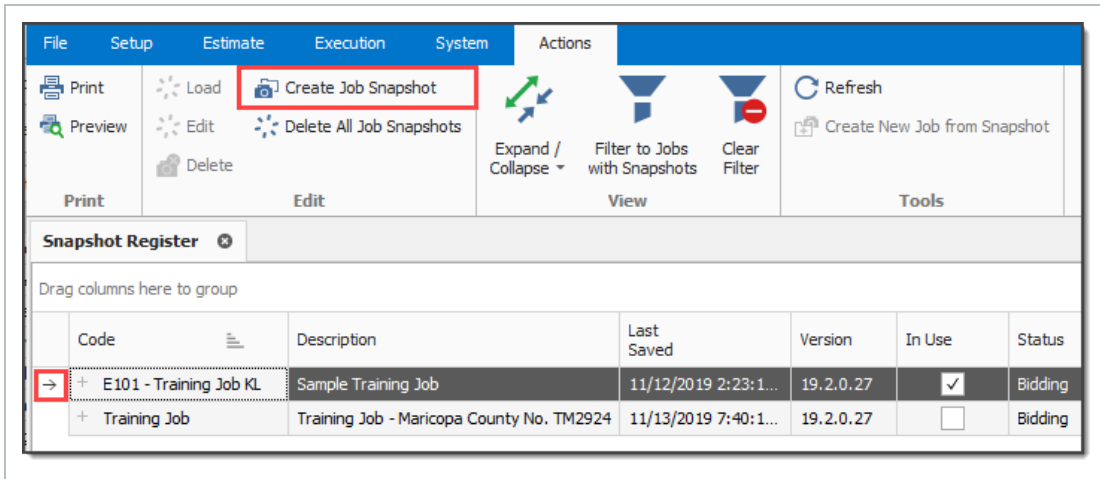
3. To view individual snapshots for specific jobs, click the  icon next to the desired job to display the list of snapshots.

	Code	Description
→	+ E101 - Training Job KL	Sample Training Job
	+ Training Job	Training Job - Maricopa County No. TM2924

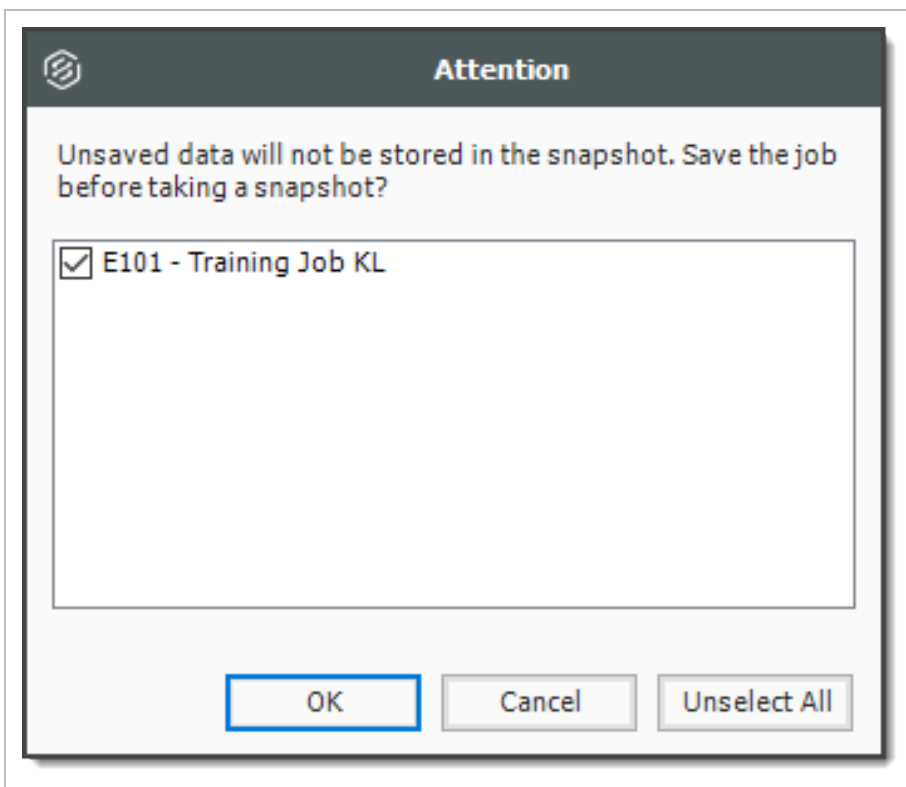
STEP BY STEP – CREATE A NEW JOB SNAPSHOT

You can create a Job Snapshot from an existing Job.

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



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



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

New Job Snapshot [E101 - Training Job KL]

Job: Job Description:

Snapshot Comment:

☒ Include all Attachments that have been stored in the Job Folder with this Snapshot

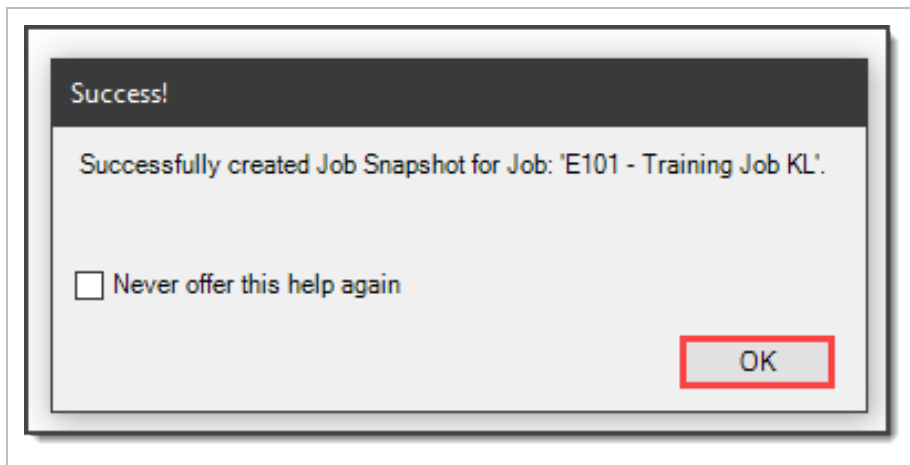
User Access

☐ Use Job's current User Access restrictions for this Snapshot

☐ Remove all User Access restrictions for this Snapshot

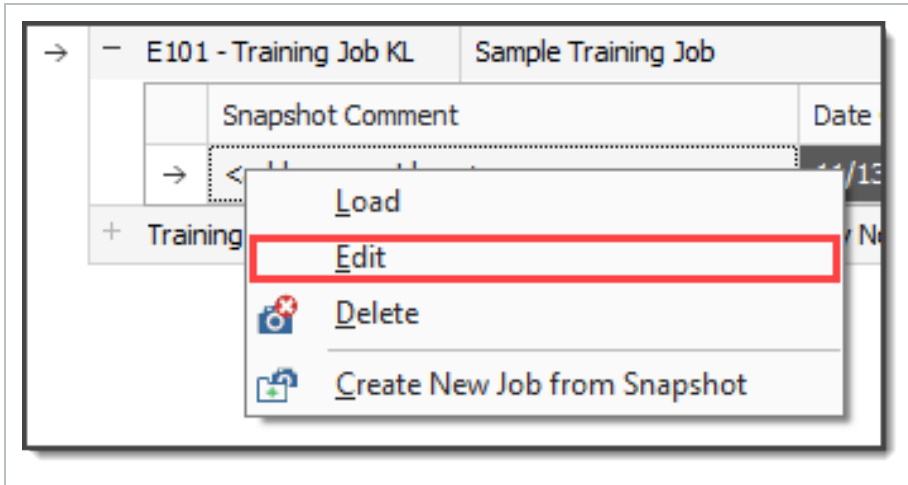
☒ Specify User Access restrictions for this Snapshot

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



STEP BY STEP – EDIT A JOB SNAPSHOT

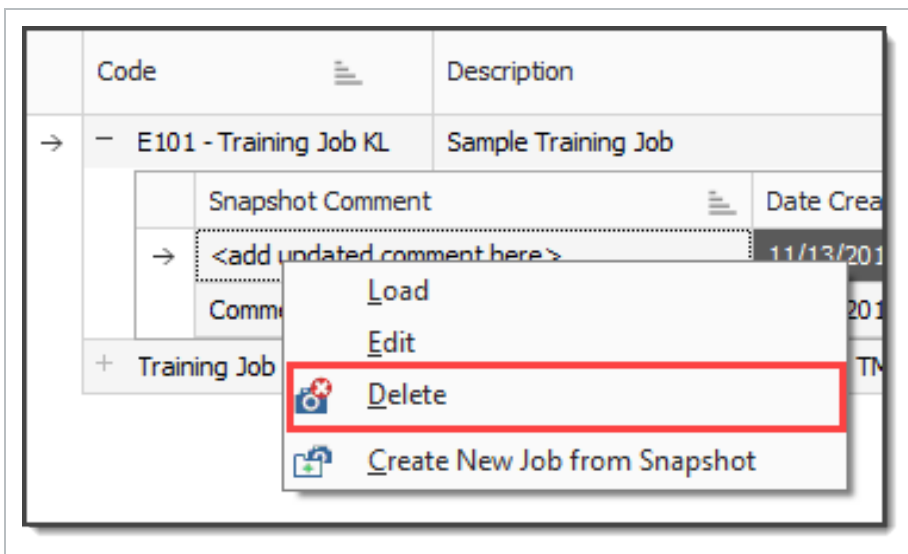
1. From the Snapshot Register, click the  icon next to the desired job to display snapshots.
2. Right-click on the individual snapshot you want to edit and select **Edit**.



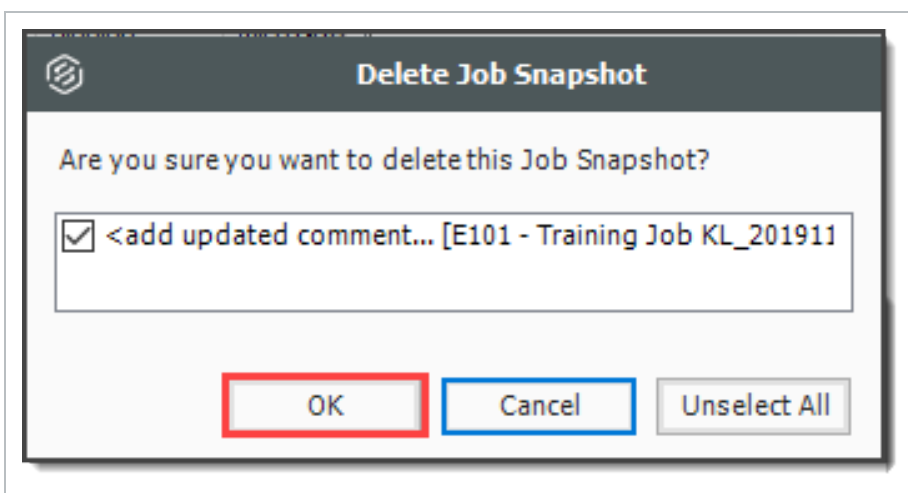
3. The same sort of dialog box opens up as when you created the Snapshot. In this case, from the Edit Job Snapshot [Job Code Here] dialog box, modify the Snapshot Comment and the User Access options as needed.
 - If you want to Include all Attachments that have been stored in the Job Folder with this 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.

STEP BY STEP – DELETE A JOB SNAPSHOT

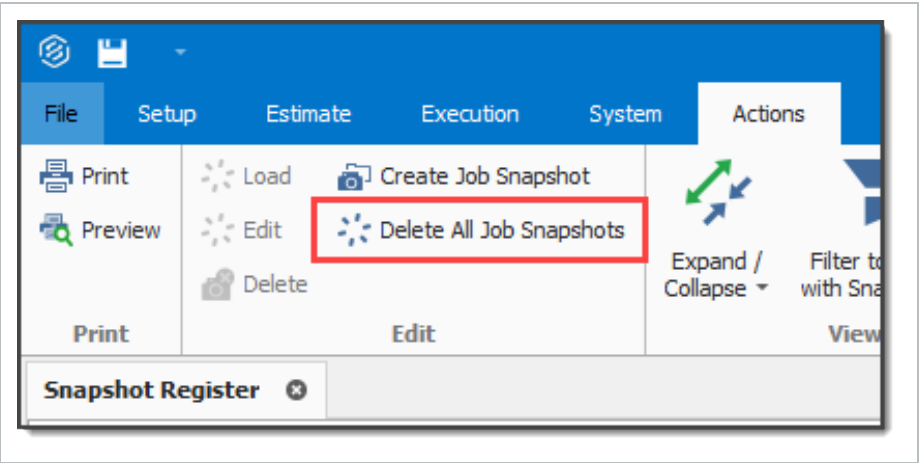
1. From the Snapshot Register, click the  icon next to the desired job to display snapshots.
2. Right-click on the individual snapshot you want to delete snapshots from and select **Delete**.



3. Click **OK**

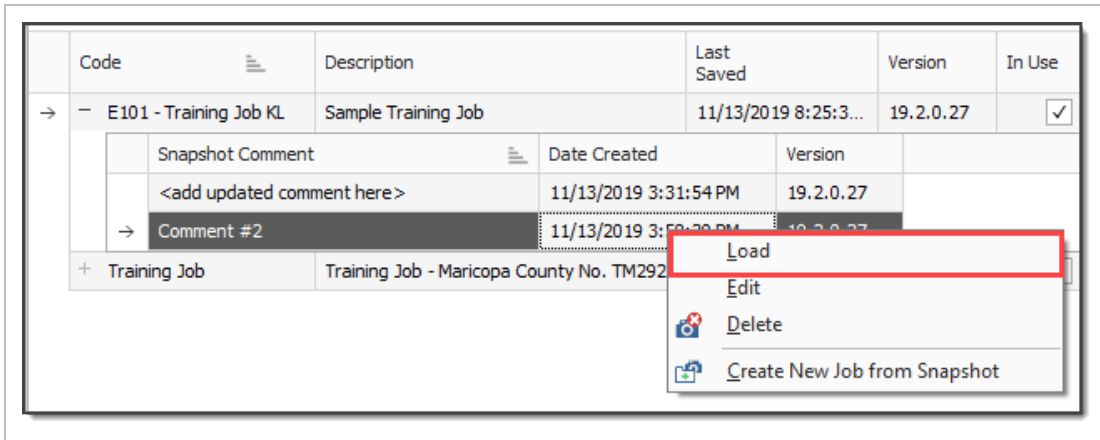


Alternatively, you can delete all Job Snapshots by clicking **Delete All Job Snapshots** from the Actions tab.



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  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**.



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.

Software interface showing the 'Estimate' window with a 'Snapshot' view. The window title is 'SNAPSHOT: Training Job - Estimate'. The interface includes a menu bar (File, Setup, Estimate, Quote, Price, Execution, System, Actions, More Actions) and a toolbar with various icons for actions like Print, New, Copy, Split, Indent, Link Field, Cost Item, Assembly, Resource, etc.

The main area displays the 'Cost Breakdown Structure (CBS) Register' and a 'CBS Tree (Filter Mode)' on the left. The tree lists various cost items, including 'JOB', 'Prime Bond', 'Price % Add-On', 'Job Financing', 'Indirect Cost Escalation', 'Direct Cost Escalation', 'Indirect Cost Add-On', 'Direct Cost Add-On', 'General Expense', 'Mobilization', 'Clearing & Grubbing', 'Unclassified Excavation', 'Aggregate Base', 'Asphalt Concrete Hot Mix Ty...', '36 Inch RCP Culvert Class III', '10 Inch PVC Force Main (SD...', '24 Inch PVC Gravity Sewer (...', '4 Foot Diameter Manhole', 'Structural Excavation & Backfill', 'Steel Reinforcement', and 'Retaining Wall'.

The main table shows the following columns: CBS Position Code, Description, Forecast (T/D) Quantity, Unit of Measure, Unit Cost, Total Cost (Forecast), Allocated, Allocation Source, Currency, Cost Adjustment, and Optional Code. The table lists various cost items, including 'JOB', 'Prime Bond', 'Price % Add-On', 'Job Financing', 'Indirect Cost Escalation', 'Direct Cost Escalation', 'Indirect Cost Add-On', 'Direct Cost Add-On', 'General Expense', 'Mobilization', 'Clearing & Grubbing', 'Unclassified Excavation', 'Aggregate Base', 'Asphalt Concrete Hot Mix Ty...', '36 Inch RCP Culvert Class III', '10 Inch PVC Force Main (SD...', '24 Inch PVC Gravity Sewer (...', '4 Foot Diameter Manhole', 'Structural Excavation & Backfill', 'Steel Reinforcement', and 'Retaining Wall'.

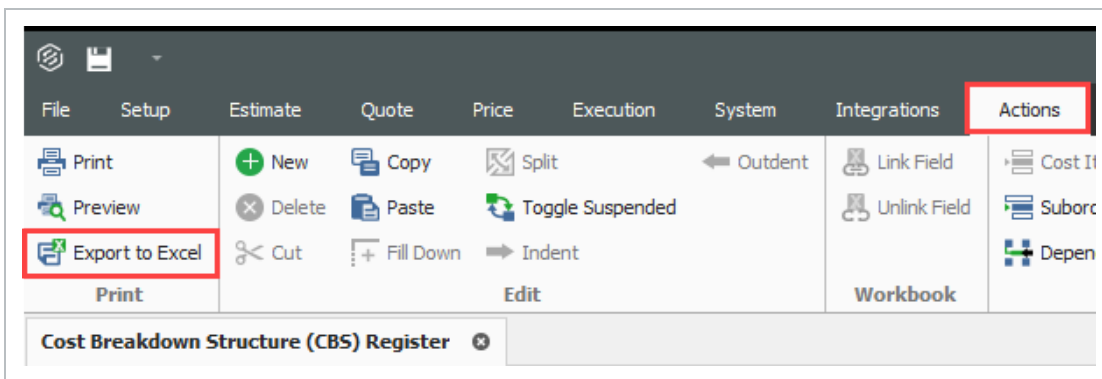
The bottom status bar shows 'As-Entered Currency', 'As-Entered Units', 'Minimum Example', 'SNAPSHOT: Training Job (Snapshot #2) - [11/13/2019 4:37:34 PM]', and 'Accrued Costs OFF'.

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LESSON 11 - SPREADSHEET INTEGRATION

STEP BY STEP – EXPORT DATA TO AN EXCEL WORKBOOK

1. Open the **Training** Job and from the Estimate tab, open the **CBS Register**.
2. From the Actions tab, select **Export to Excel**.



3. On the Export spreadsheet to... dialog, browse to the location (folder) in your system where you want to save the workbook, enter **CBS Export** in the File name field, and click **Save**.
 - The workbook is saved to that location with the specified file name, and Excel automatically launches and displays the workbook

- Notice that the columns are formatted, with column headers and filtering turned on

The screenshot shows an Excel spreadsheet titled "CBS Export - Excel" with a ribbon at the top containing tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Help, Acrobat, Search, and Share. The "Home" tab is active, showing options for Clipboard, Font, Alignment, Number, and Styles. The spreadsheet data is as follows:

	A	B	C	D	E	F	G	H
	CBS Position Code	Description	Forecast (T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency	Qty
1		JOB	20.00	Mile	\$292,316.18	\$5,846,323.66	U.S. Dollar	
2		Prime Bond	1.00	Lump Sum	\$46,974.12	\$46,974.12	U.S. Dollar	
3		Price % Add-On	1.00	Lump Sum	\$294,067.09	\$294,067.09	U.S. Dollar	
4		Job Financing	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar	
5		Indirect Cost Escalation	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar	
6		Direct Cost Escalation	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar	
7		Indirect Cost Add-On	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar	
8		Job Management & Equipment	1.00	Lump Sum	\$157,096.28	\$157,096.28	U.S. Dollar	
9		General Expense	1.00	Lump Sum	\$4,200.00	\$4,200.00	U.S. Dollar	
10		Direct Cost Add-On	1.00	Lump Sum	\$104,301.10	\$104,301.10	U.S. Dollar	
11		Mobilization	1.00	Lump Sum	\$11,909.51	\$11,909.51	U.S. Dollar	
12	1	Clearing & Grubbing	10.00	Acre	\$3,918.50	\$39,184.97	U.S. Dollar	
13	2	Unclassified Excavation	50,000.00	Cubic Yard	\$4.68	\$233,915.81	U.S. Dollar	
14	3	Aggregate Base	45,000.00	Ton	\$15.40	\$692,928.99	U.S. Dollar	
15	4	Asphalt Concrete Hot Mix Type A	35,000.00	Ton	\$42.62	\$1,491,580.59	U.S. Dollar	
16	5	Furnish & Haul Hot Mix	35,000.00	Ton	\$39.27	\$1,374,562.54	U.S. Dollar	
17	5.1	Install Hot Mix Type A	35,000.00	Ton	\$3.34	\$117,018.05	U.S. Dollar	
18	5.2	36 Inch RCP Culvert Class III	1,024.00	Linear Feet	\$67.54	\$69,159.49	U.S. Dollar	
19	6	Furnish RCP Materials	1,024.00	Linear Feet	\$33.48	\$34,286.70	U.S. Dollar	
20	6.1	Excavate RCP Trench	1,858.56	Cubic Yard	\$4.51	\$8,379.59	U.S. Dollar	
21	6.2	Install RCP Pipe	1,024.00	Linear Feet	\$11.74	\$12,017.60	U.S. Dollar	
22	6.3							

At the bottom of the spreadsheet, there are tabs for "Formatted Data" (selected) and "Raw Data".

STEP BY STEP – CELL SELECT

1. Open the **Training** Job and from the Setup tab, open the **Resource Rate Register**.
2. Select the **Labor** tab.
3. Select **Print View for Summary** from your Saved Views drop-down menu.
4. From the top-right corner, select the **Cell Select**  icon, (next to the Help icon). This puts you in *Cell Select* mode, so you can select cells to copy in the same way you would in Excel.
5. With the Cell Select icon active, highlight all information in the **Description**, **Utilization Count** and **Unit of Measure** columns for all Labor resources.

Resource Rate Register

All	Labor	Construction Equipment	Rented Construction Equipment	Installed Material	Installed Equipment	Supplies	Unique
-----	-------	------------------------	-------------------------------	--------------------	---------------------	----------	--------

Drag columns here to group

Resource Code	Description	Utilization Count	Unit of Measure
+ LC1	Carpenter Apprentice	594.37	Hour
+ LC2	Carpenter Journeyman	1,188.73	Hour
+ LC3	Carpenter Foreman	594.37	Hour
+ LF1	Finisher Apprentice	0.00	Hour
+ LF2	Finisher	594.37	Hour
+ LF3	Finisher Foreman	0.00	Hour
+ LIW1	Iron Worker	594.37	Hour
+ LIW2	Iron Worker Foreman	0.00	Hour
+ LL1	Labor Apprentice	0.00	Hour
+ LL2	Laborer	8,963.73	Hour
+ LL3	Labor Foreman	721.33	Hour
+ LMECH	Mechanic	418.44	Hour
+ LO1	Operator Class 1	1,800.00	Hour
+ LO2	Operator Class 2	4,019.73	Hour
+ LO3	Operator Class 3	889.33	Hour
+ LO4	Operator Foreman	1,421.77	Hour
+ LREM 01	Principal Eng/Scientist	0.00	Hour
+ LREM 05	Field Technician	0.00	Hour
+ LSPE	Project Engineer	800.00	Hour
+ LSSEC	Secretary	800.00	Hour
+ LSSUPT	Project Superintendent	800.00	Hour
+ LT1	Teamster	3,056.77	Hour
+ LT2	Teamster Foreman	0.00	Hour
+ LWD	Welder	0.00	Hour
→ LWDA	Welder Apprentice	0.00	Hour
*			

- Right click on the selection and select **Copy**.
- Open an Excel spreadsheet, right click in the **A1** field and select **Paste Special**, choosing **CSV** as the Source.
- Click **OK**. The fields you copied from InEight Estimate paste into the spreadsheet.

	A	B	C
1	Carpenter Apprentice	594.3650794 Hour	
2	Carpenter Journeyman	1188.730159 Hour	
3	Carpenter Foreman	594.3650794 Hour	
4	Finisher Apprentice	0 Hour	
5	Finisher	594.3650794 Hour	
6	Finisher Foreman	0 Hour	
7	Iron Worker	594.3650794 Hour	
8	Iron Worker Foreman	0 Hour	
9	Labor Apprentice	0 Hour	
10	Laborer	8963.733879 Hour	
11	Labor Foreman	721.3333333 Hour	
12	Mechanic	418.4398946 Hour	
13	Operator Class 1	1800 Hour	
14	Operator Class 2	4019.732279 Hour	
15	Operator Class 3	889.3333333 Hour	
16	Operator Foreman	1421.768 Hour	
17	Principal Eng/Scientist	0 Hour	
18	Field Technician	0 Hour	
19	Project Engineer	800 Hour	
20	Secretary	800 Hour	
21	Project Superintendent	800 Hour	
22	Teamster	3056.768 Hour	
23	Teamster Foreman	0 Hour	
24	Welder	0 Hour	
25	Welder Apprentice	0 Hour	
26			

Sheet1

To turn off the Cell Select, simply click the Cell Select Icon again and it deselects

STEP BY STEP – LINK ESTIMATE TO THE JOB'S WORKBOOK

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

	A	B	C	D	E	F	G
1	Concrete Take-off						
2							
3	Length	10	yards				
4	Width	10	yards				
5	Height	0.5	yards				
6							
7							
8							
9							
10							
11							
12							

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

	A	B	C
1	Concrete Take-off		
2			
3	Length	10	yards
4	Width	10	yards
5	Height	0.5	yards
6	Volume	=sum(B3*B4*B5)	
7			

- Your Volume Total should be 50 cubic yards

	A	B	C
1	Concrete Take-off		
2			
3	Length	10	yards
4	Width	10	yards
5	Height	0.5	yards
6	Volume	50	CY
7			

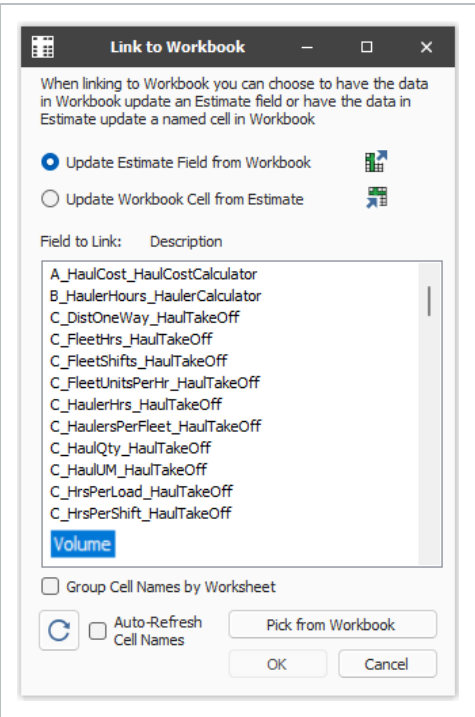
6. InEight Estimate will only link to named fields in the worksheet. Click in the field you want to name (B6), then click in the Field Name window and type **Volume**.

	A	B	C
1	Concrete Take-off		
2			
3	Length	10 yards	
4	Width	10 yards	
5	Height	0.5 yards	
6	Volume	50 CY	
7			

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 Workbook**.
 - You can also link the field by selecting the field and then selecting **Link Field** from the Actions tab

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency
+ 6.8	Vacuum Test Manhole	1.00	EA	\$500.00	\$500.00	U.S. Dollar
7	Pavement Replacement, HMA over Ag...	2,375.61	SY	\$87.11	\$206,942.59	U.S. Dollar
+ 7.1	Buy Material	2,375.61	SY	\$32.21	\$76,527.73	U.S. Dollar
+ 7.2	Finegrade subgrade	2,375.61	SY	\$8.34	\$19,803.06	U.S. Dollar
+ 7.3	Place & Trim Agg Base				1.02	U.S. Dollar
+ 7.4	Spray Prime Coat				5.64	U.S. Dollar
+ 7.5	Laydown AC, 6" lift				5.64	U.S. Dollar
+ 7.6	Trucking				0.50	U.S. Dollar
8	Concrete Sidewalk				1.72	U.S. Dollar
+ 8.1	Buy Materials				5.01	U.S. Dollar
+ 8.2	Finegrade subgrade				1.16	U.S. Dollar
+ 8.3	Place Aggregate Base Course				8.34	U.S. Dollar
+ 8.3.1	Buy Material				3.39	U.S. Dollar
+ 8.3.2	Place & Trim Agg Base				1.60	U.S. Dollar
+ 8.3.3	Trucking				0.35	U.S. Dollar
+ 8.4	Fabricate Formwork				7.86	U.S. Dollar
+ 8.5	Erect & Strip Forms				9.57	U.S. Dollar
+ 8.6	Place Concrete				7.56	U.S. Dollar
+ 8.7	Install Expansion Joint Material				2.22	U.S. Dollar
9	Combination Concrete Curb and Gutte...				3.10	U.S. Dollar

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



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

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

LESSON 12 - SCHEDULE INTEGRATION

STEP BY STEP – LOGIN OPTIONS TAB

1. 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

The screenshot shows the 'Job Properties' dialog box with the 'Login Options' tab selected. The 'Use these login settings' radio button is selected. The 'Instance' dropdown is set to '-Default-', the 'Database' dropdown is set to 'pmdb', the 'User Name' field contains 'admin', and the 'Password' field is masked with asterisks. The 'Use pre-defined login settings' radio button is unselected.

STEP BY STEP – SCHEDULE A COST ITEM IN INEIGHT ESTIMATE

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

Saved views: Schedule Setup View

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

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

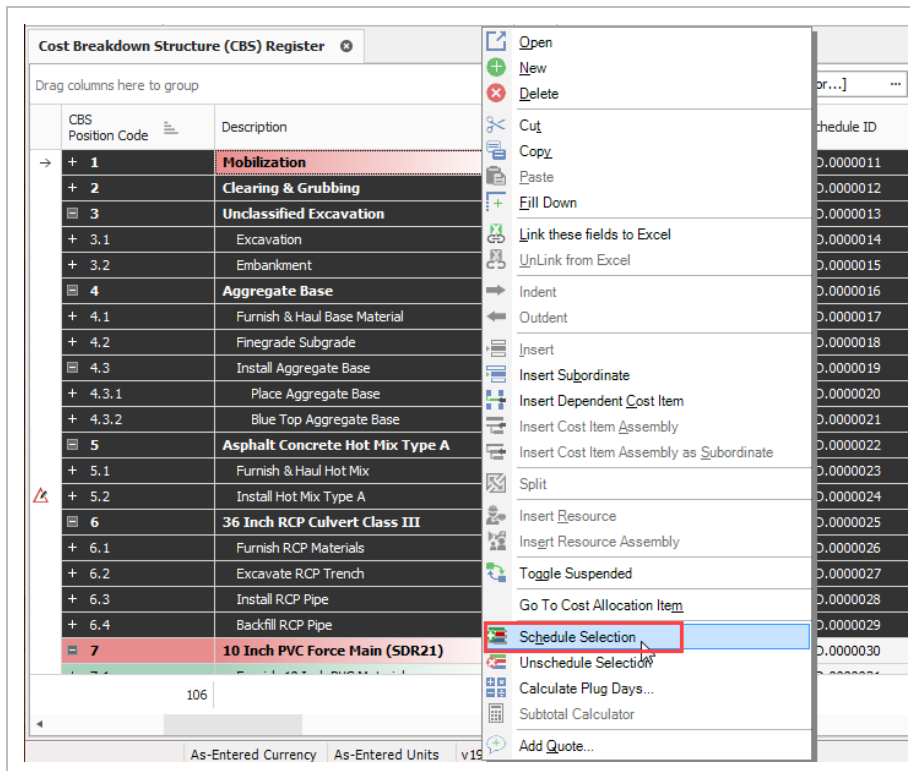
STEP BY STEP – SCHEDULE A GROUP OF COST ITEMS IN INEIGHT ESTIMATE

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**.

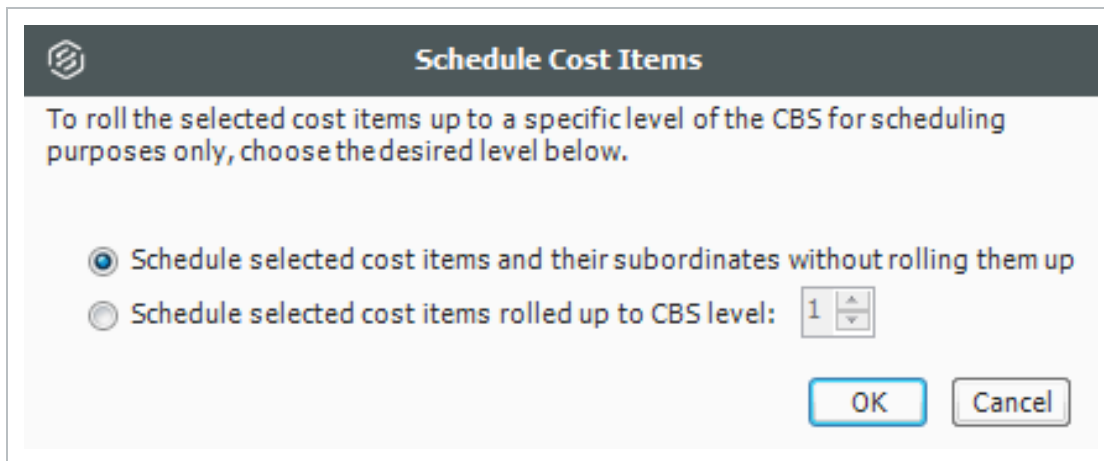
TIP

To schedule all cost items, highlight the **JOB** row.

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



- 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**.



The dialog box is titled "Schedule Cost Items" and contains the following text: "To roll the selected cost items up to a specific level of the CBS for scheduling purposes only, choose the desired level below." There are two radio button options. The first option is selected and reads "Schedule selected cost items and their subordinates without rolling them up". The second option is unselected and reads "Schedule selected cost items rolled up to CBS level:" followed by a spinner box containing the number "1". At the bottom right are "OK" and "Cancel" buttons.

Schedule Cost Items

To roll the selected cost items up to a specific level of the CBS for scheduling purposes only, choose the desired level below.

☒ Schedule selected cost items and their subordinates without rolling them up

☐ Schedule selected cost items rolled up to CBS level: 1

OK Cancel

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

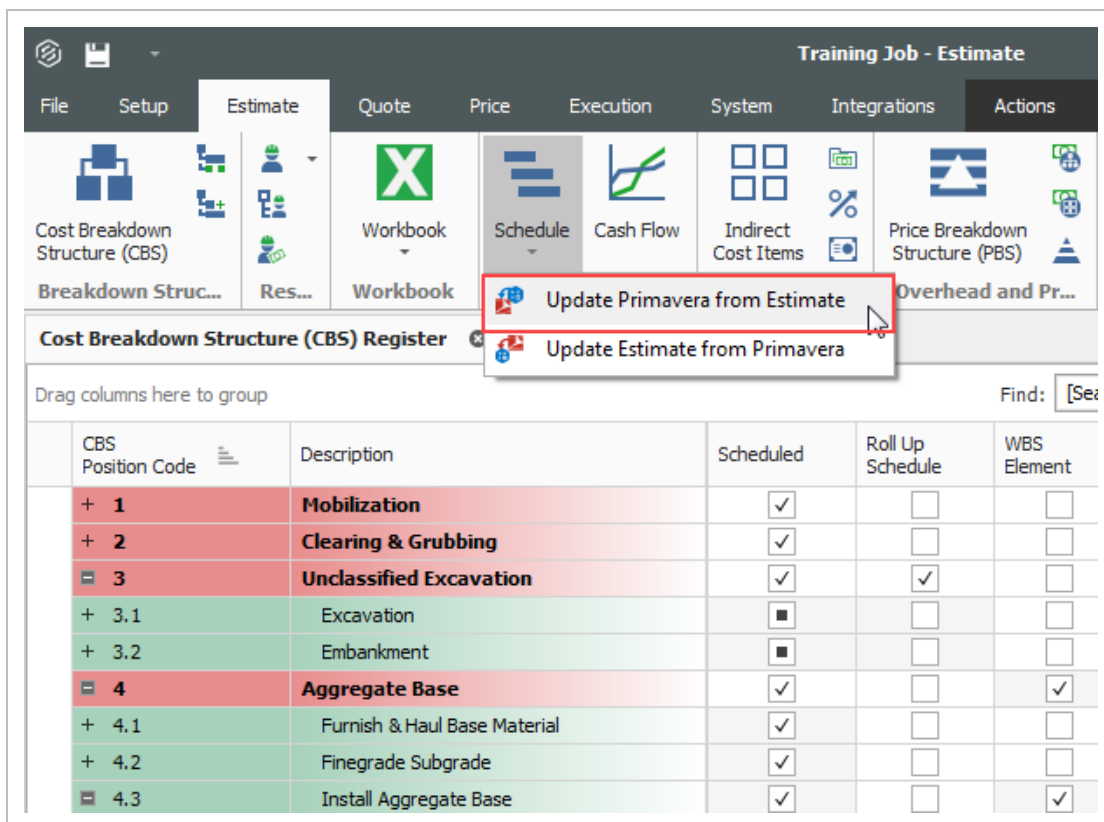
STEP BY STEP – ROLL UP SCHEDULE

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.

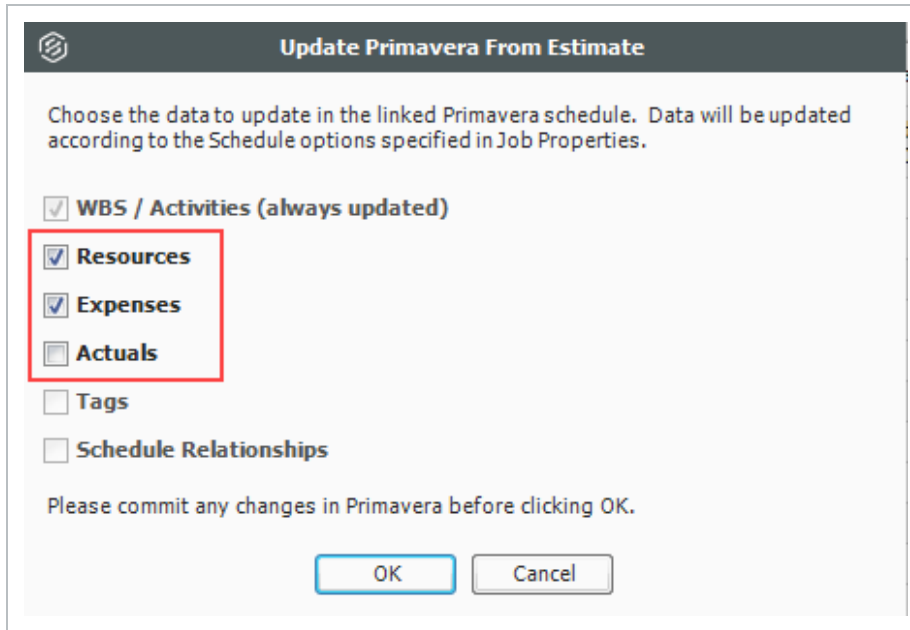
CBS Position Code	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	☒	☐
+ 2	Clearing & Grubbing	☒	☐
▣ 3	Unclassified Excavation	☒	☒
+ 3.1	Excavation	☒	☐
+ 3.2	Embankment	☒	☐
▣ 4	Aggregate Base	☒	☐
+ 4.1	Furnish & Haul Base Material	☒	☐
+ 4.2	Finegrade Subgrade	☒	☐
▣ 4.3	Install Aggregate Base	☒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

STEP BY STEP – UPDATE PRIMAVERA FROM INEIGHT ESTIMATE

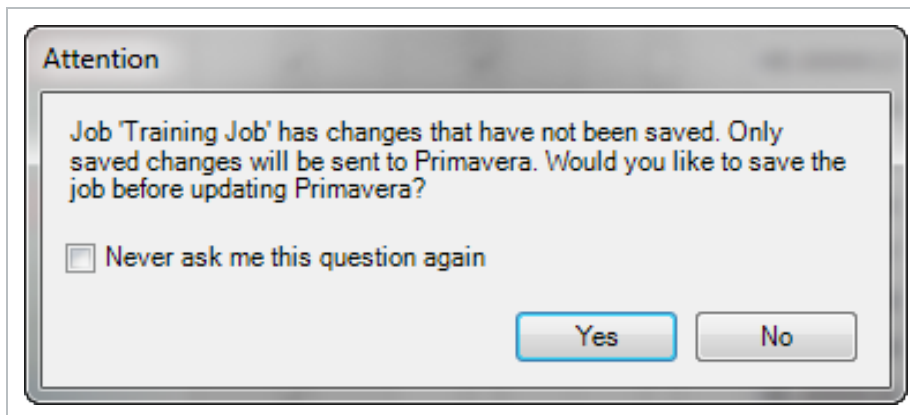
1. From the Estimate tab, select **Schedule>Update Primavera from InEight Estimate**.



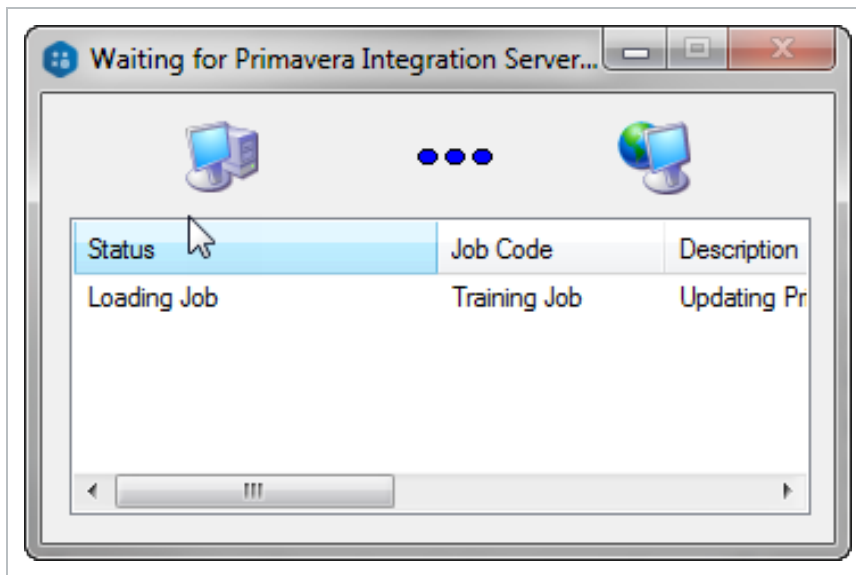
- The Update Primavera From Estimate dialog prompts you to indicate what data to update to Primavera
2. Make sure **Resources** and **Expenses** are checked. Deselect **Actuals** (For Job Tracking purposes) if auto selected, then click **OK**.



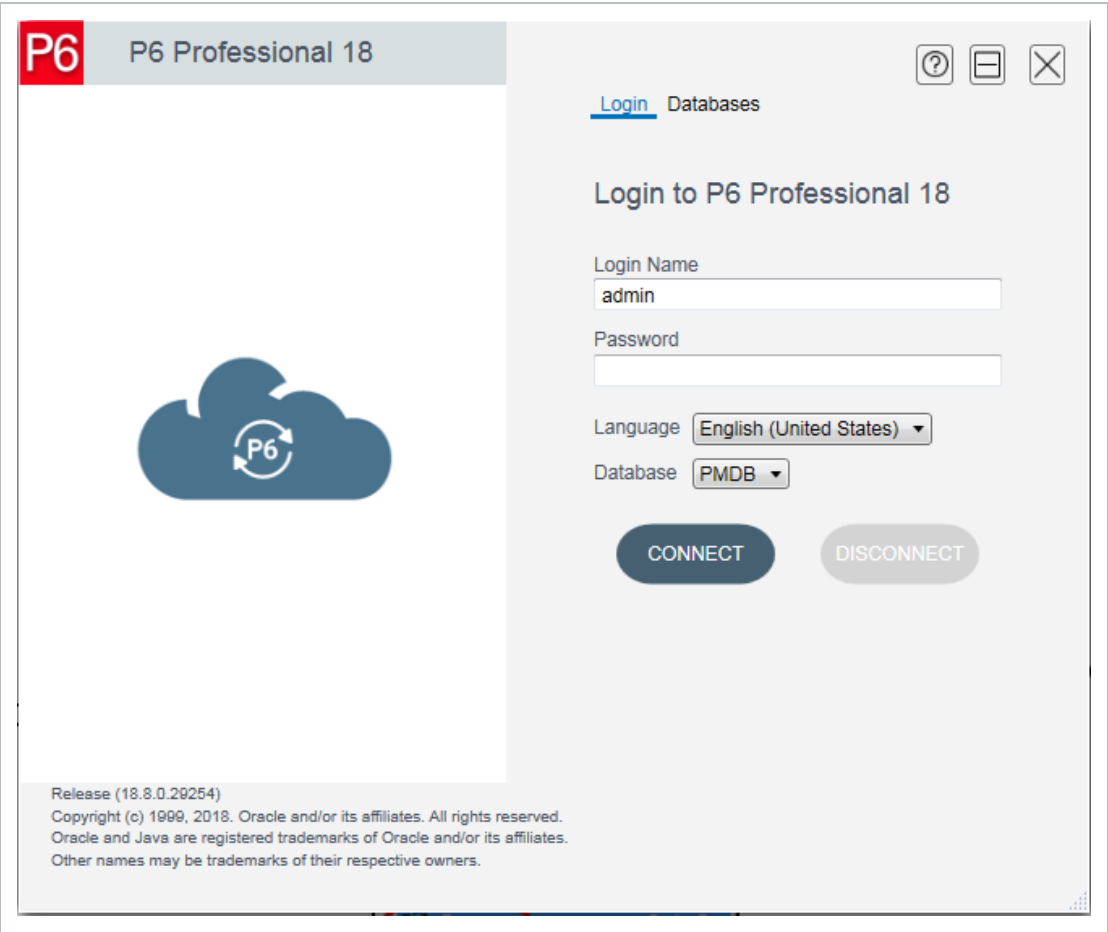
- An Attention prompt appears, letting you know that the job has not been saved.
3. Click **Yes** to save the job before updating Primavera.



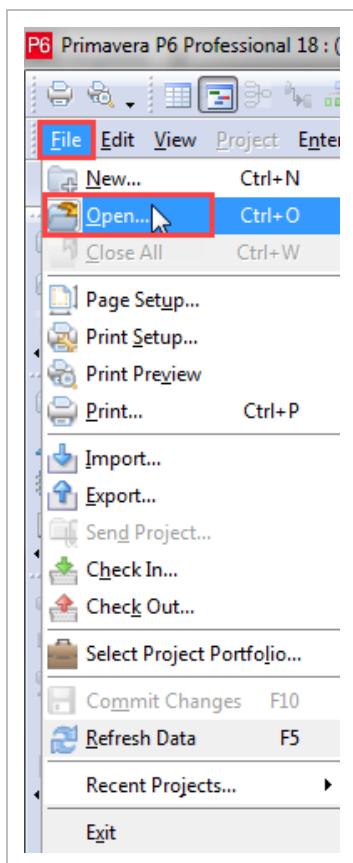
- A window appears that shows the progress of the data sync between InEight Estimate and Primavera. Depending on the size of the job, this can take several minutes



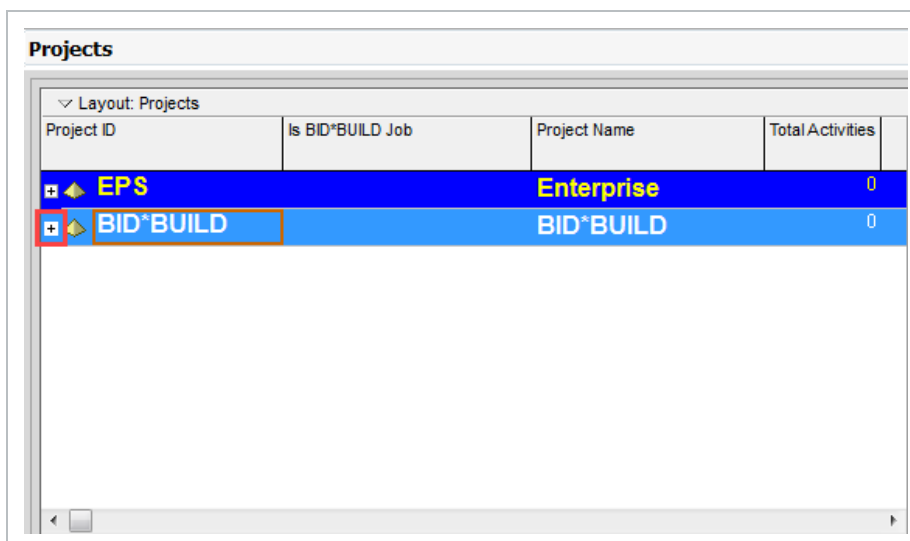
- When the window disappears, the update is complete
4. Open Primavera P6 (Project Management) client.
 5. Log in to Primavera, using the same Username and Password that was entered on the Schedule > Login Options tab in InEight Estimate Job Properties.



6. In Primavera, open the project.



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

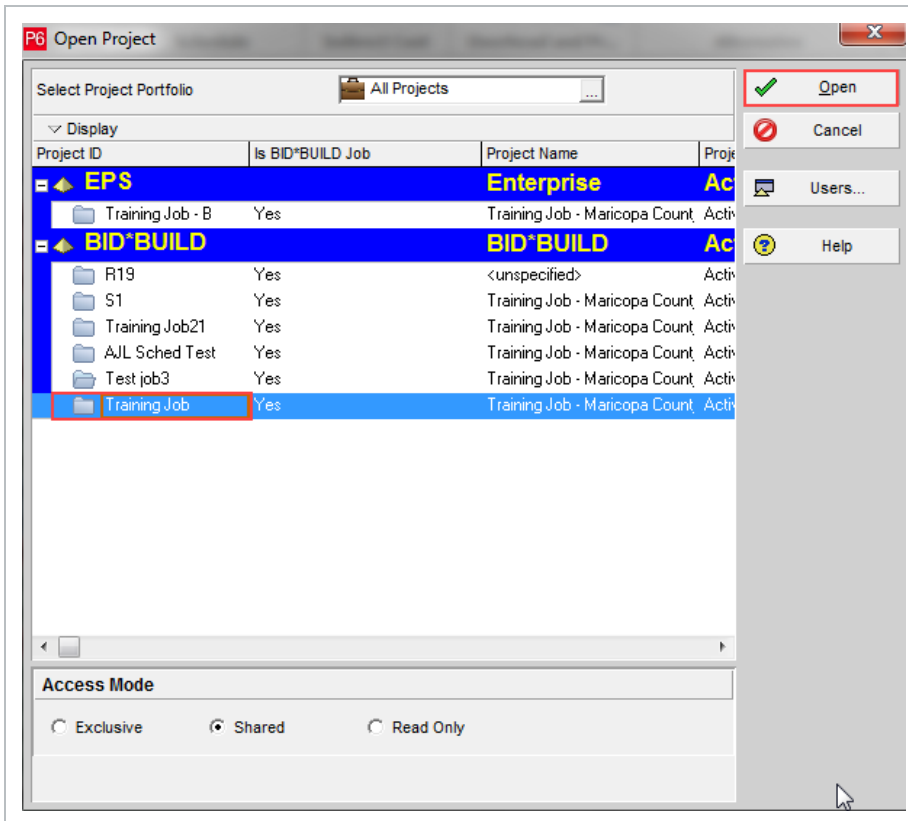


NOTE

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**.



- 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.

Primavera P6 Professional 18: Training Job (Training Job - Maricopa County No. TM2924)

File Edit View Project Enterprise Tools Help

Activities

Layout: Classic Schedule Layout Filter: All Activities

Activity ID	Activity Name	Original Duration	Remaining Duration	Schedule % Complete	Start
1	Mobilization	10.00	10.00	0%	03-Feb-20
2	Clearing & Grubbing	10.00	10.00	0%	03-Feb-20
3	Unclassified Excavation	25.83	25.83	0%	03-Feb-20
4.1	Furnish & Haul Base Material	45.00	45.00	0%	03-Feb-20
4.2	Finegrade Subgrade	40.00	40.00	0%	03-Feb-20
4.3.1	Place Aggregate Base	30.00	30.00	0%	03-Feb-20
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	03-Feb-20
5.1	Furnish & Haul Hot Mix	29.17	29.17	0%	03-Feb-20
5.2	Install Hot Mix Type A	29.17	29.17	0%	03-Feb-20
6.1	Furnish RCP Materials	5.00	5.00	0%	03-Feb-20
6.2	Excavate RCP Trench	4.65	4.65	0%	03-Feb-20
6.3	Install RCP Pipe	4.10	4.10	0%	03-Feb-20
6.4	Backfill RCP Pipe	9.92	9.92	0%	03-Feb-20

February 2020 March 2020 Apr

26 02 09 16 23 01 08 15 22 29 05

Mobilization
Clearing & Grubbing
Unclassified Excavation
Furnish & Haul Base Material
Finegrade Subgrade
Place Aggregate Base
Blue Top Aggregate Base
Furnish & Haul Hot Mix
Install Hot Mix Type A
Furnish RCP Materials
Excavate RCP Trench
Install RCP Pipe
Backfill RCP Pipe

General Status Resources Codes Relationships Notebook Steps Feedback WPs & Docs Expenses Summary

Activity 1 Mobilization Project Training Job

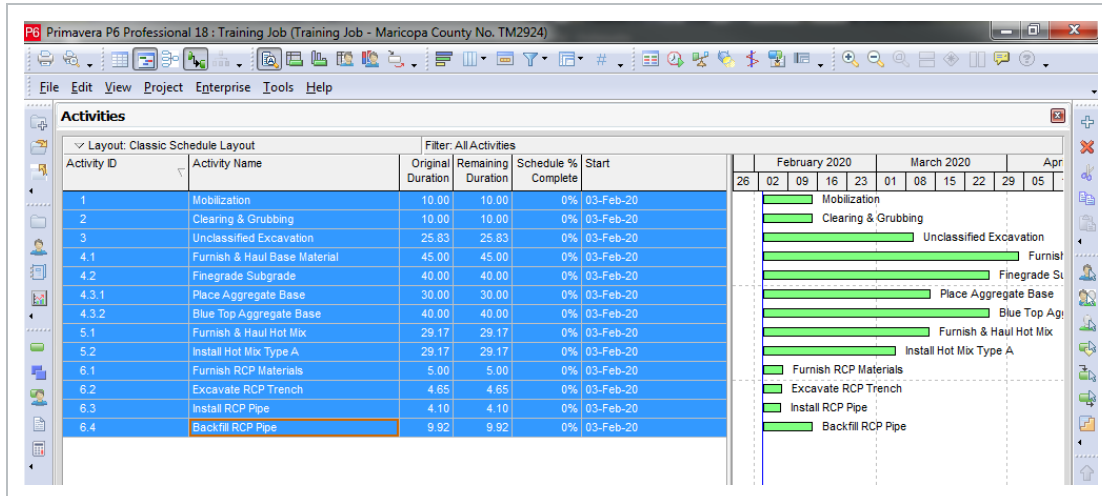
Resource ID Name	Price / Unit	Rate Type	Rate Source	Vary Resou	Budgeted Units	Actual Units	Remaining Units	Remaining Units / Time	Role
ETLT.Lowboy Trailer	\$33.60/h	Override		☐	80.00	0.00	80.00	8.00/d	Truck
LT1.Teamster	\$30.62/h	Override		☒	80.00	0.00	80.00	8.00/d	Truck Drive
ETTT.Tractor Truck	\$78.40/h	Override		☐	80.00	0.00	80.00	8.00/d	Truck

Add Resource Add Role Assign by Role Remove

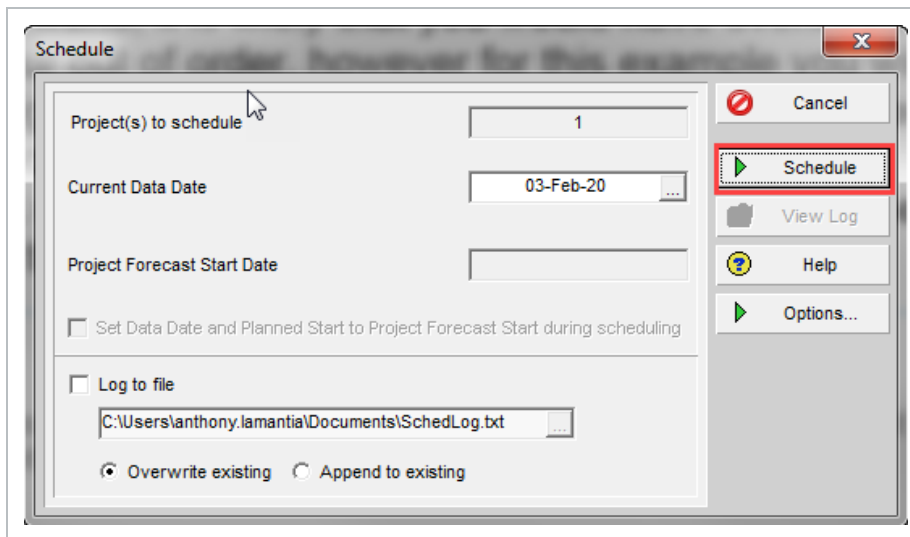
Portfolio: All Projects Access Mode: Shared Data Date: 03-Feb-20 Baseline: Current Project Last Job Request: Pendii User: admin DB: PMDB (EPPM)

STEP BY STEP – UPDATE INEIGHT ESTIMATE FROM PRIMAVERA

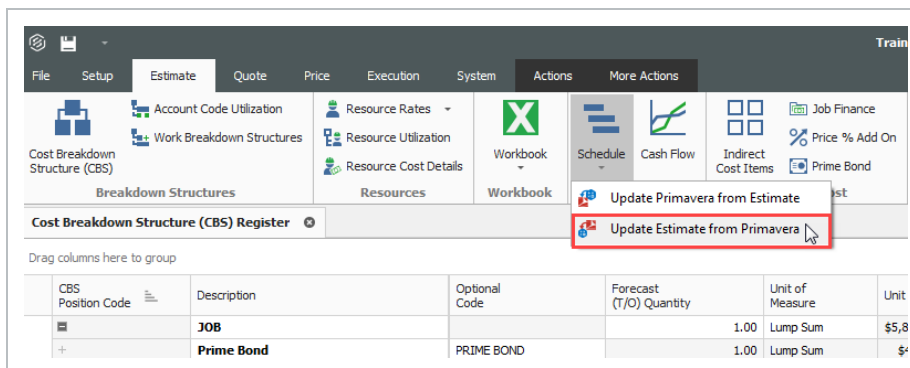
1. Open your version of the **Training Job** project in Primavera.
 - In the real world, it is likely that you would have overlapping activities, or your activities would occur out of order, however for this example you will link all activities from finish to start
2. Highlight all of your activities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



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.



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**.

Update 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	2/14/2020
+ 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	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	11/9/2020
+ 4.1	Furnish & Haul Base Material	4/6/2020	6/8/2020	4/6/2020	6/8/2020	4/6/2020	6/8/2020
+ 4.2	Finegrade Subgrade	6/8/2020	8/3/2020	6/8/2020	8/3/2020	6/8/2020	8/3/2020
+ 4.3	Install Aggregate Base	8/3/2020	11/9/2020	8/3/2020	11/9/2020	8/3/2020	11/9/2020
+ 4.3.1	Place Aggregate Base	8/3/2020	9/14/2020	8/3/2020	9/14/2020	8/3/2020	9/14/2020

STEP BY STEP – SCHEDULE PLUG DAYS

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

CBS Position Code	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	☒	26.01
+ 6.1	Furnish RCP Materials	0.00	☒	5.00
+ 6.2	Excavate RCP Trench	4.65	☒	7.00
+ 6.3	Install RCP Pipe	4.10	☐	4.10
+ 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.

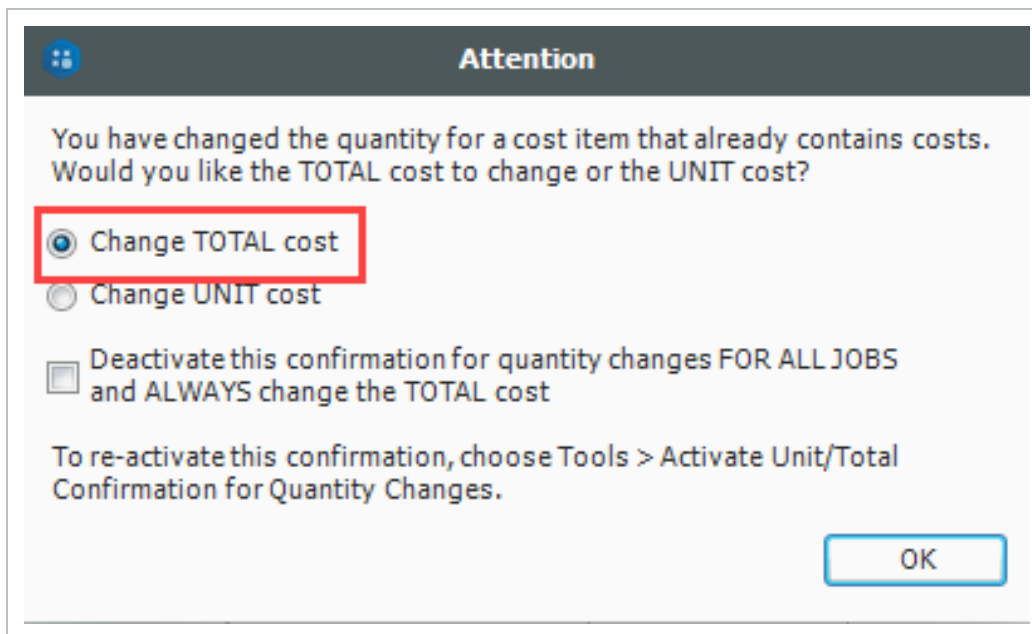
STEP BY STEP – UPDATE PRIMAVERA WITH INEIGHT ESTIMATE CHANGES

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

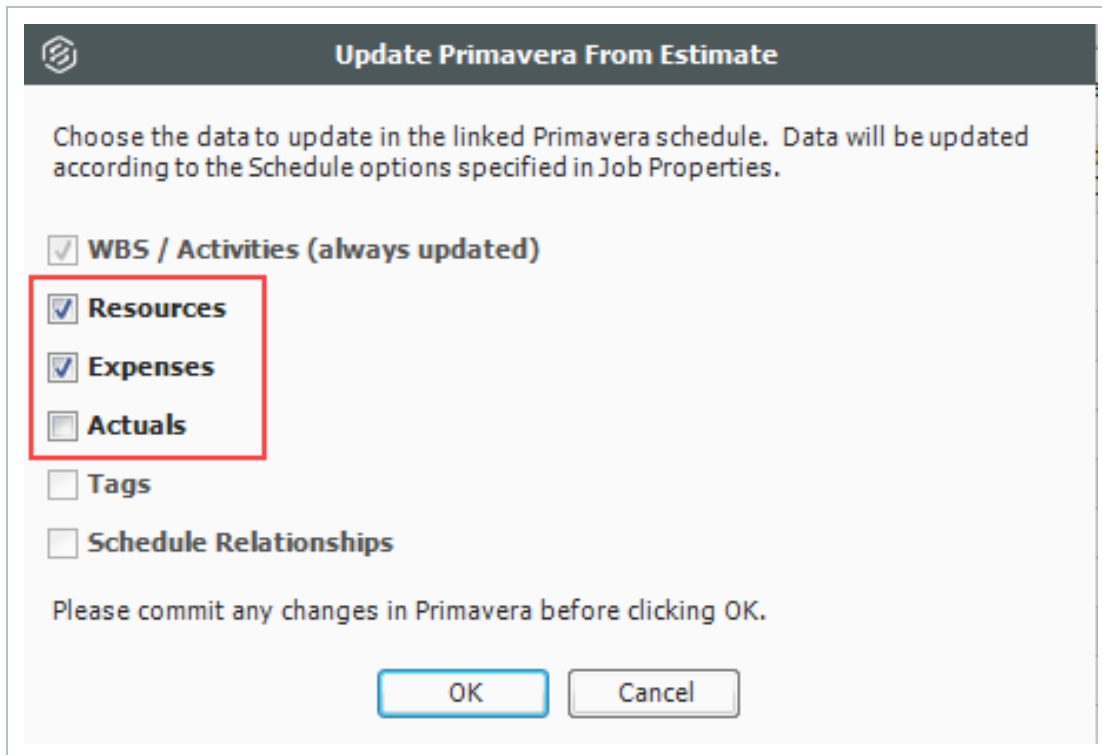
CBS Code	Description	Old Quantity	New Quantity
5	Asphalt Concrete Hot Mix Type A	35,000	25,000

- 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**.

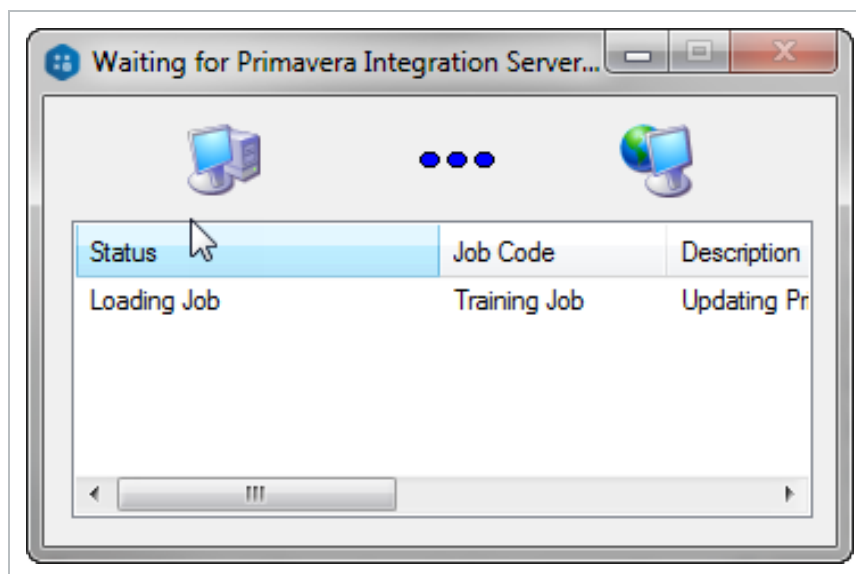


3. From the Estimate tab, select **Schedule>Update Primavera from InEight Estimate** to send the changed hours to Primavera.
 - The Update Primavera From InEight Estimate dialog prompts you to indicate what data to update to Primavera

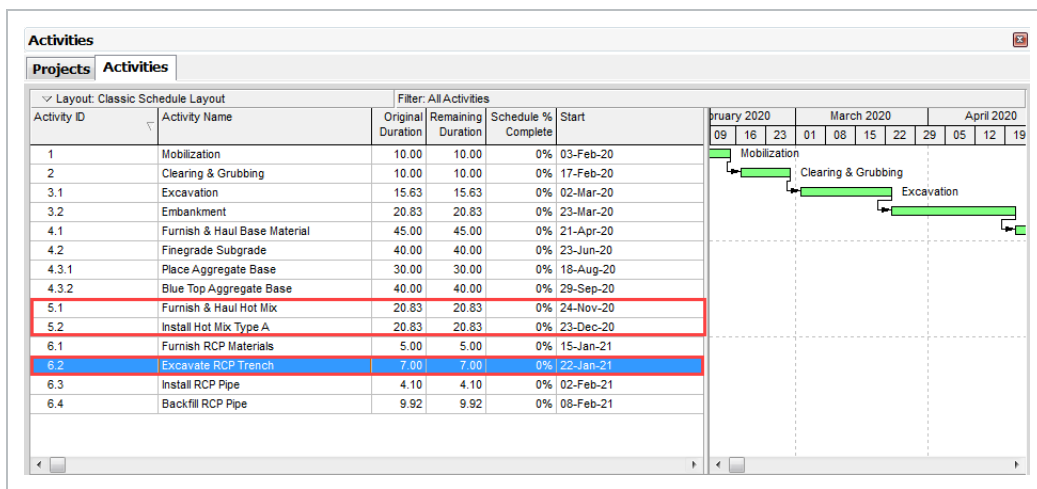
4. Make sure Resources and Expenses are checked, then select **OK**.



- 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



- 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



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.
9. Your start and finish dates are different now. In InEight Estimate, from the Estimate tab, select **Schedule>Update InEight Estimate from Primavera** to update InEight Estimate with the new dates.

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

STEP BY STEP – SCHEDULE A COST ITEM IN INEIGHT ESTIMATE

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

Saved views: Schedule Setup View

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

CBS Position Code	Description	Scheduled	Roll Up Schedule
[-]	JOB	☒	☐
+	Prime Bond	☐	☐
+	Price % Add-On	☐	☐
+	Job Financing	☐	☐
+	Indirect Cost Escalation	☐	☐
+	Direct Cost Escalation	☐	☐
+	Indirect Cost Add-On	☐	☐
+	Job Management & Equipment	☐	☐
+	General Expense	☐	☐
+	Direct Cost Add-On	☐	☐
+ 1	Mobilization	☒	☐
+ 2	Clearing & Grubbing	☒	☐
[-] 3	Unclassified Excavation	☒	☐
+ 3.1	Excavation	☒	☐
+ 3.2	Embankment	☒	☐
[-] 4	Aggregate Base	☐	☐
+ 4.1	Furnish & Haul Base Material	☐	☐
+ 4.2	Finegrade Subgrade	☐	☐

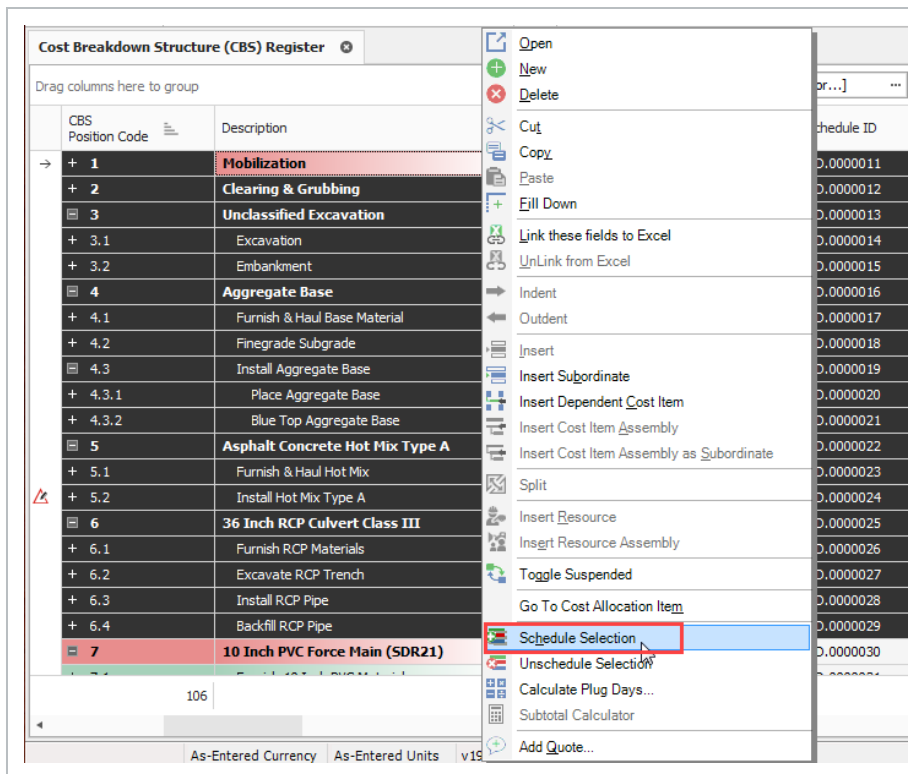
STEP BY STEP – SCHEDULE A GROUP OF COST ITEMS IN INEIGHT ESTIMATE

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**.



- 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**.



Schedule Cost Items

To roll the selected cost items up to a specific level of the CBS for scheduling purposes only, choose the desired level below.

☒ Schedule selected cost items and their subordinates without rolling them up

☐ Schedule selected cost items rolled up to CBS level:

1

▲▼

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

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	☒	☐
- 3	Unclassified Excavation	☒	☒
+ 3.1	Excavation	☒	☐
+ 3.2	Embankment	☒	☐
- 4	Aggregate Base	☒	☐
+ 4.1	Furnish & Haul Base Material	☒	☐
+ 4.2	Finegrade Subgrade	☒	☐
- 4.3	Install Aggregate Base	☒	☐
+ 4.3.1	Place Aggregate Base	☒	☐
+ 4.3.2	Blue Top Aggregate Base	☒	☐

STEP BY STEP – UPDATE MS PROJECT FROM INEIGHT ESTIMATE

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

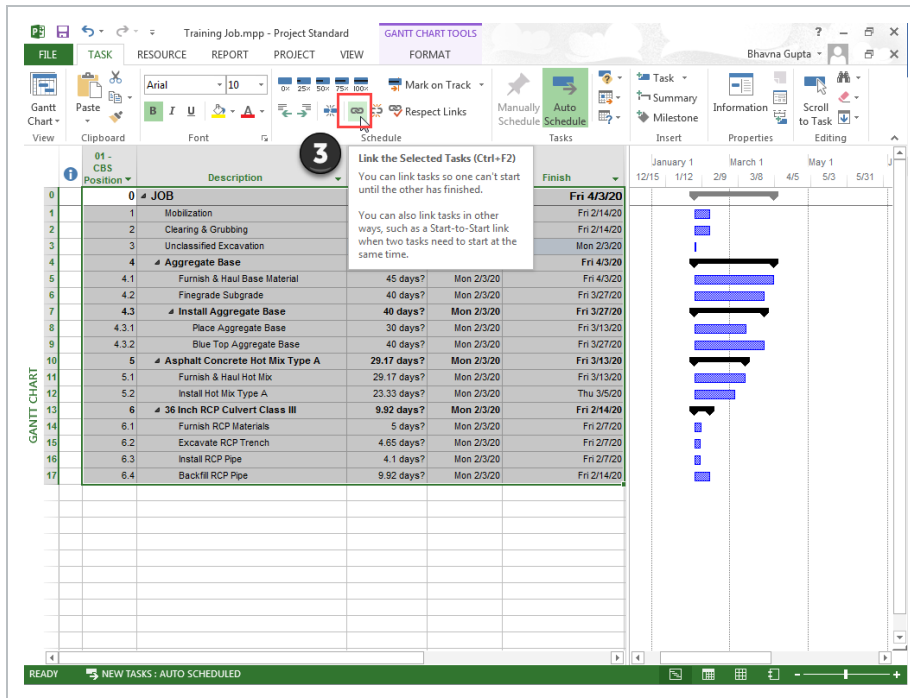
The screenshot shows the InEight Estimate software interface. The 'Estimate' tab is selected. In the 'Actions' section, the 'Schedule' dropdown menu is open, and the 'Update Project from Estimate' option is highlighted with a red box. The main window displays the 'Cost Breakdown Structure (CBS) Register' with a table of cost items.

CBS Position Code	Description	Optional Code	Quantity	Measure	Unit Cost	Total Cost (Forecast)	Subject Cost
	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	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 Escalation	INDIRECT COST ESCALATION	1.00	Lump Sum	\$2,131.11	\$2,131.11	
	Direct Cost Escalation	DIRECT COST ESCALATION	1.00	Lump Sum	\$15,048.80	\$15,048.80	
	Indirect Cost Add-On		1.00	Lump Sum	\$5,888.67	\$5,888.67	\$294,433.42
	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,088.34	\$104,088.34	\$5,204,417.24
1	SITEWORK & ROADWAY	200	1.00	Each	\$2,464,161.56	\$2,464,161.56	
1.1	Mobilization	641 0100	1.00	Lump 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 >

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**.

Training Job - Estimate

File Setup Estimate Quote Price Execution System Integrations Actions More Actions

Cost Breakdown Structure (CBS) Work Breakdown Structures Resources Resource Utilization Resource Cost Details Resource Employments Workbook Schedule Cash Flow Indirect Cost Items Job Finance Price % Add On Prime Bond Price Breakdown Structure (PBS) Overhead and Profit

Cost Breakdown Structure (CBS) Register

Drag columns here to group

Update Estimate from Project

Update Project from Estimate

Export Copy of MS Project File

CBS Position Code	Description	Optional Code	Quantity	Measure	Unit Cost	Total Cost (Forecast)	Subject Cost
→	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	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 Escalation	INDIRECT COST ESCALATION	1.00	Lump Sum	\$2,131.11	\$2,131.11	
+	Direct Cost Escalation	DIRECT COST ESCALATION	1.00	Lump Sum	\$15,048.80	\$15,048.80	
+	Indirect Cost Add-On		1.00	Lump Sum	\$5,888.67	\$5,888.67	\$294,433.42
+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,088.34	\$104,088.34	\$5,204,417.24
1	SITework & ROADWAY	200	1.00	Each	\$2,464,161.56	\$2,464,161.56	
1.1	Mobilization	641 0100	1.00	Lump Sum	\$11,909.51	\$11,909.51	

- 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	Finest Subgrade	5/5/2020	6/29/2020	5/5/2020	6/29/2020	5/5/2020	6/29/2020
4.3	Install Aggregate Base	6/30/2020	10/5/2020	6/30/2020	10/5/2020	6/30/2020	10/5/2020
4.3.1	Place Aggregate Base	6/30/2020	8/10/2020	6/30/2020	8/10/2020	6/30/2020	8/10/2020
4.3.2	Blue Top Aggregate Base	8/11/2020	10/5/2020	8/11/2020	10/5/2020	8/11/2020	10/5/2020
5	Asphalt Concrete Hot Mix Type A	10/6/2020	12/17/2020	10/6/2020	12/17/2020	10/6/2020	12/17/2020
5.1	Furnish & Haul Hot Mix	10/6/2020	11/16/2020	10/6/2020	11/16/2020	10/6/2020	11/16/2020
5.2	Install Hot Mix Type A	11/16/2020	12/17/2020	11/16/2020	12/17/2020	11/16/2020	12/17/2020
6	36 Inch RCP Culvert Class III	12/17/2020	1/20/2021	12/17/2020	1/20/2021	12/17/2020	1/20/2021
6.1	Furnish RCP Materials	12/17/2020	12/24/2020	12/17/2020	12/24/2020	12/17/2020	12/24/2020
6.2	Excavate RCP Trench	12/24/2020	12/31/2020	12/24/2020	12/31/2020	12/24/2020	12/31/2020
6.3	Install RCP Pipe	12/31/2020	1/6/2021	12/31/2020	1/6/2021	12/31/2020	1/6/2021
6.4	Backfill RCP Pipe	1/6/2021	1/20/2021	1/6/2021	1/20/2021	1/6/2021	1/20/2021

STEP BY STEP – SCHEDULE PLUG DAYS

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

CBS Position Code	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	☒	26.01
+ 6.1	Furnish RCP Materials	0.00	☒	5.00
+ 6.2	Excavate RCP Trench	4.65	☒	7.00
+ 6.3	Install RCP Pipe	4.10	☐	4.10
+ 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.

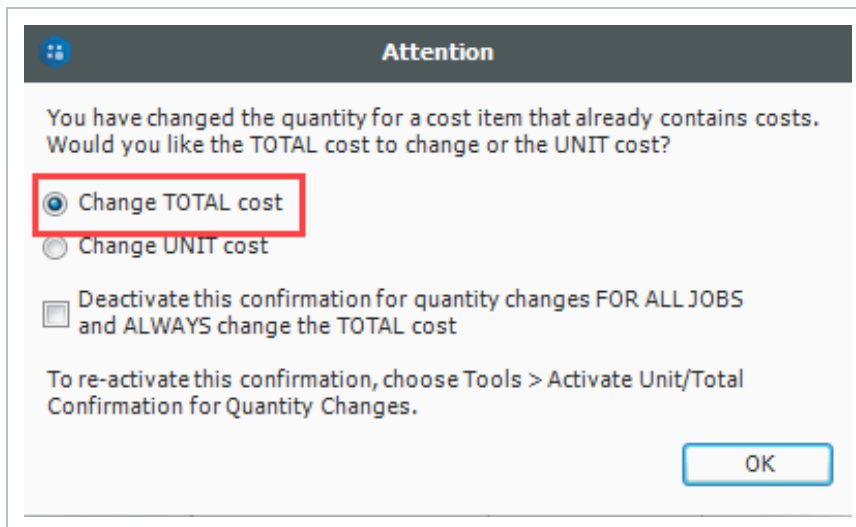
STEP BY STEP – UPDATE MS PROJECT WITH INEIGHT ESTIMATE CHANGES

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



3. From the Estimate tab, select **Schedule>Update Project from 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 adjusted because you adjusted the Forecast T/O Quantity in InEight Estimate

	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	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

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

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

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LESSON 12 - CASH FLOW

STEP BY STEP – CASH FLOW OPTIONS SETUP

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

The screenshot shows a software interface with a top navigation bar. The 'Cash Flow' tab is highlighted in red. Below it, a sub-menu is open, and the 'Cash Flow' option is also highlighted in red. Other tabs visible include Overview, Security, Cover Sheet, Cost Basis, Minority Setup, Fuel Cost, Job Tracking, Job Folder Tags, Competitors, Pricing, Schedule, and E.

- 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

The screenshot shows the 'Revenue timing' section of the software interface. The 'Revenue timing' tab is highlighted in red. The 'Bills are submitted to the owner:' section has three radio button options: 'At the end of the job', 'Every month on this day' (selected and highlighted in red with a value of 10), and 'Every 1 weeks'. The 'Average calendar days elapsed from billing to collection:' is set to 25 days. The 'Amount of each billing that is withheld by owner as retainage:' is set to 5.00%. The 'Retainage is released:' section has two radio button options: 'At the end of the job' (selected) and 'On a specific date:'. There is also a checkbox for 'Spread revenue using the same Cost Curves as the contributing Cost 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

The screenshot shows the 'Cost timing' section of the software interface. The 'Cost timing' tab is highlighted in red. The 'Bills are received from subcontractors and vendors:' section has three radio button options: 'At the end of the job', 'Every month on this day' (selected and highlighted in red with a value of 25), and 'Every 1 weeks'. The 'Average calendar days elapsed from receipt of invoice to payment:' is set to 30 days. The 'Amount of each invoice received that is withheld by you as retainage:' is set to 5.00%. The 'Retainage is released to subcontractors and vendors:' section has two radio button options: 'At the end of the job' (selected) and 'On a specific date:'. There is also a checkbox for '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).

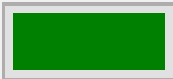
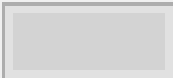
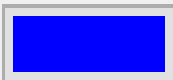
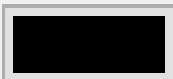
Cost of money	4	
Average annual interest rate paid to borrow money (when cost exceeds		10.00 %
Average annual interest rate earned (when revenue exceeds cost):		2.00 %

5. Leave all remaining options as originally defaulted.

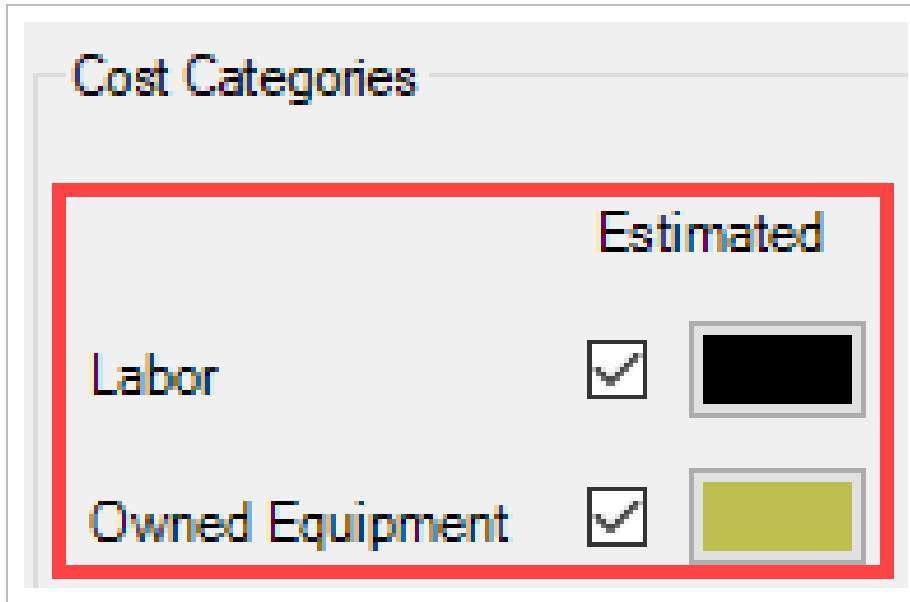
STEP BY STEP – CASH FLOW DISPLAY SETTINGS SET UP

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)	

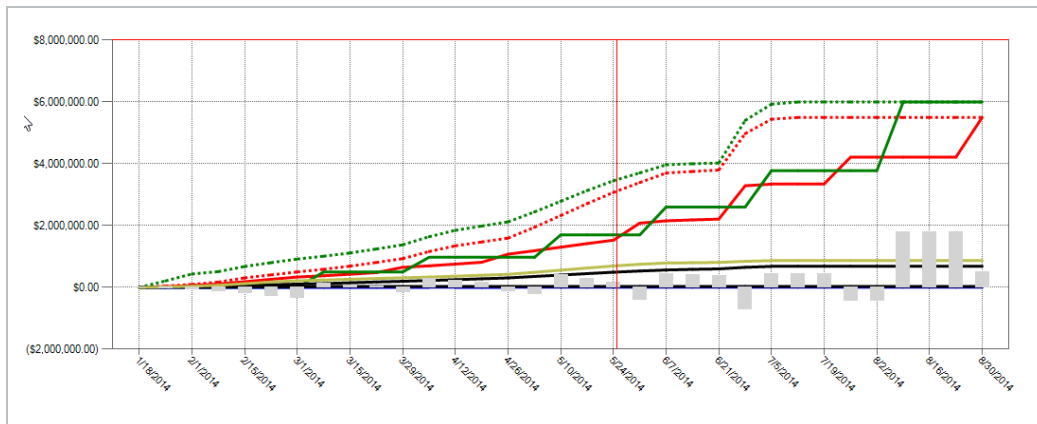
5. Under the **Cost Categories** section, check the **Estimated** checkbox for the Labor and Owned Equipment categories.



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



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

Thursday, December 27, 2018

February 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
16	17	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

Clear

Date Range

Start: 2/3/2014 ▾ Start: ▾

End: ▾ End: ▾

Total Cost Forecast) - C

- 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.

STEP BY STEP – RESOURCE UTILIZATION DISPLAY SETUP

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

Resources

☒ Resource Utilization

Summarize resources by: Description

Get data from: ☒ This job's utilized resources ☐ All Library resources

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

Get data from: ☒ This job's utilized resources ☐ All Library resources

Value	Qty	Cost	AB Qty	AB Co ^
☐ Labor Foreman				
☒ Laborer				
☐ Loader 950				
☐ 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

☐ Labor Foreman

☒ Laborer

☐ Loader 950

☐ Lowboy Trailer

☐ Manhole Precast 4 Ft

Qty	Cost	AB Qty	AB Co

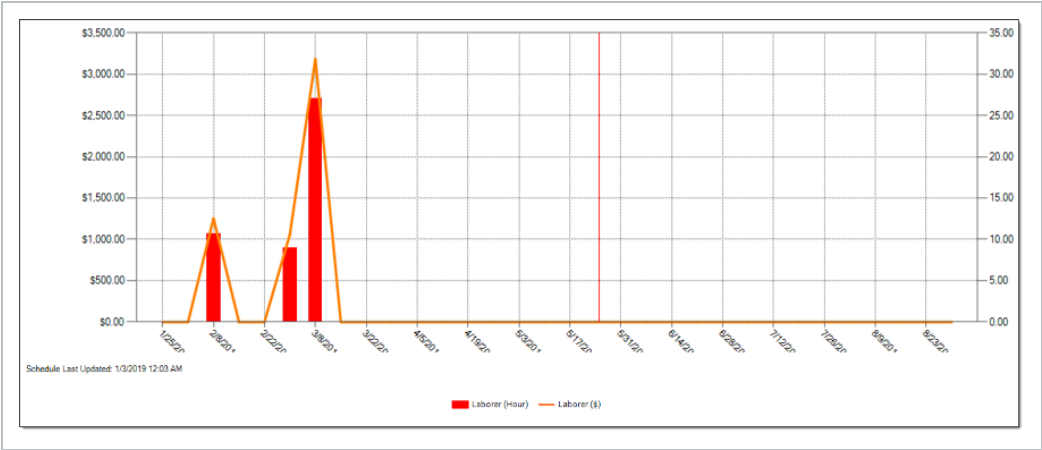
Quantity:

Bar

Cost:

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



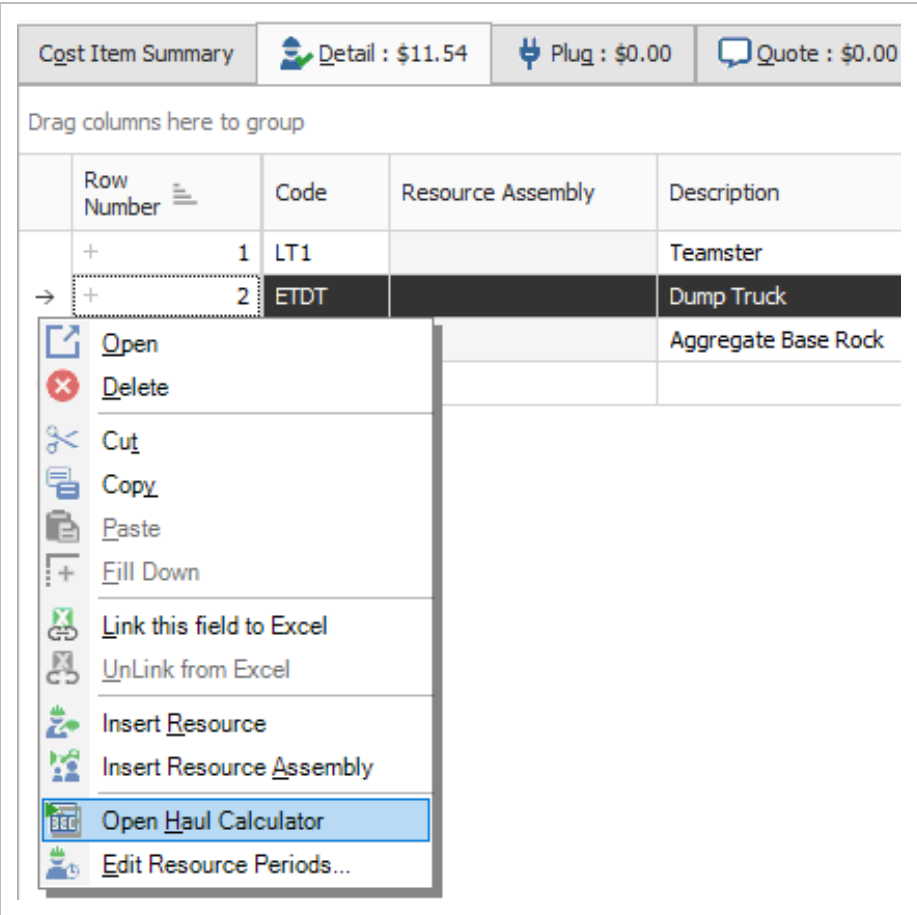
The graphs displayed on the Cash Flow form are based on the estimated cost of each cost item and its resource employments (in the case of resource utilization).

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LESSON 13 - HAUL CALCULATOR

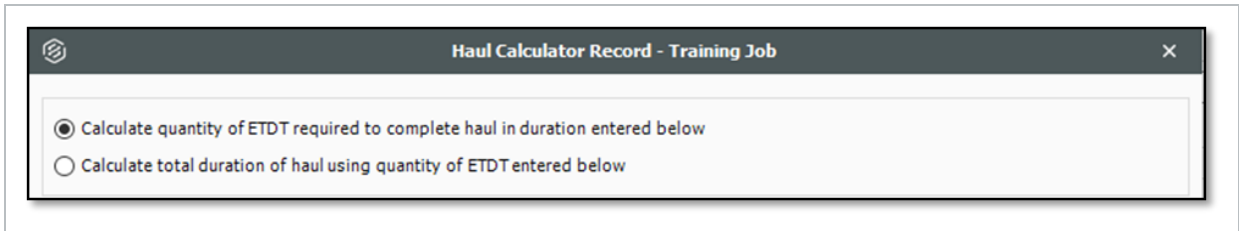
STEP BY STEP – HAUL CALCULATOR - CALCULATE QUANTITY OF TRUCKS

- 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**.



- 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.)



The screenshot shows a dialog box titled "Haul Calculator Record - Training Job" with a close button (X) in the top right corner. Inside the dialog, there are two radio button options. The first option, "Calculate quantity of ETDT required to complete haul in duration entered below", is selected with a filled radio button. The second option, "Calculate total duration of haul using quantity of ETDT entered below", is unselected with an empty radio button.

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

Results

Quantity of resource ETD	1.56	0.00	0.00	1.56	Concurrent Haulers
Total duration (Hours)	0.00	0.00	0.00	360.00	Hours

OK

Cancel

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

Haul Calculator Record - Training Job

☐ Calculate quantity of ETDT required to complete haul in duration entered below
☒ Calculate total duration of haul using quantity of ETDT entered 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 Haulers
Total duration (Hours)	281.08	0.00	0.00	281.08	Hours

OK Cancel

7. Click **OK**.
 - The Hours field on the Production tab updated to 281.08
 - Your ETDT Dump Truck quantity remains at 2

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**.

The screenshot displays the 'Cost Item Record' interface. On the left, the 'Resource Assembly' table is visible with the following data:

Row Number	Code	Resource Assembly	Description	Quantity (Less Waste)
1	LL2		Laborer	
2	LO2		Operator Class 2	
3	EX245		Excavator 245	

On the right, the 'Production' panel shows various production metrics. The 'CY/Hour' field is highlighted with a red box and contains the value 100.00.

6. On the Cost Item Record's Actions tab, select **Trench Calculator**.

The screenshot shows the 'Training Job - Estimate' interface. The 'Actions' tab is selected, and the 'Trench Calculator' button is highlighted with a red box. Below the Actions tab, the 'Tools' section also shows the 'Trench Calculator' button. At the bottom, the 'Trench Calculator' tool is open, displaying the following data:

Qty	Unit of Measure	Unit Cost	Total Cost	Currency
1.00	Each	\$1.74	\$1.74	U.S. D

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 Calculator

Trench Pipe Beddings

Variables

Trench length: 1000.00 feet

Trench width (at bottom): 4.00 feet

Trench depth: 10.00 feet

Hinge elevation: 5.00 feet

Backslope: 45.00 degrees

Material swell/shrinkage factor: 0.10 (decimal)

Results

Total excavation volume (neat-line): 2,407.41 CY

Use this volume as the quantity on this cost item ☐

Total excavated volume (including swell/shrinkage): 2,648.15 CY

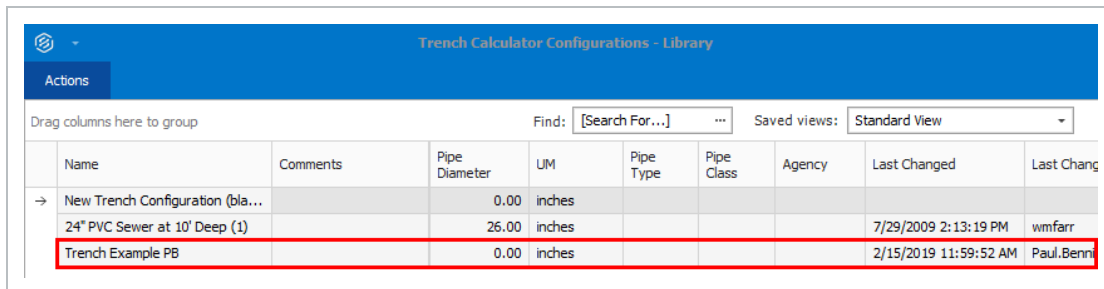
Use this volume as the quantity on this cost item ☒

Save Configuration to Library Load Configuration from Library Toggle English / Metric OK Cancel

14. Click **Save Configuration to Library** and save the Trench calculator as **Trench Example** with your initials.
15. Click **OK**.

STEP BY STEP – TRENCH CALCULATOR - PIPE

- 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
- Open the **Install Pipe** Cost Item Record.
- Add the Resource Assembly of **CPIPE - Pipe Crew** and adjust the production to **300 LF / Day**.
- On the Cost Item Record's Actions tab, select **Trench Calculator**.
- Select **Load Configuration from Library**.
- Select **Trench Example** (with your initials).



Trench Calculator Configurations - Library									
Actions									
Drag columns here to group				Find: [Search For...]	Saved views: Standard View				
	Name	Comments	Pipe Diameter	UM	Pipe Type	Pipe Class	Agency	Last Changed	Last Chang
→	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.Benni

- Click **OK**.
- On the Trench Calculator, select the **Pipe** tab.
- 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%**
- Click on the resource icon to pull up the Resource Rate Register.
- Select the Installed Material tab.
- Select **MPP24 Pipe 24" PVC SDR35**, then click **OK**.
 - The Pipe variables you entered should match the following image:

Trench Calculator

Trench Pipe Beddings

Variables

Pipe exterior diameter: 26.00 inches

Pipe center elevation (from bottom): 19.00 inches

Waste factor: 10.00 %

Results

Total pipe to purchase: **1,100.00** LF

Use Total Pipe To Purchase as the quantity on this resource (on this cost item): MPP24

Save Configuration to Library Load Configuration from Library Toggle English / Metric OK Cancel

13. Click **Save Configuration to Library** and save the Trench calculator as **Trench Example** with your initials.
14. When prompted to overwrite the existing saved file, click **Yes**.
15. Click **OK** to close the Trench Calculator.

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): inches

Additional material needed to compensate for compaction: %

Conversion factor (TON per CY):

Results

Lift Volume: **77.78** CY

Use Lift Volume as the quantity on this resource (on this cost item):

Lift Weight: **124.44** Tons

Use Lift Weight as the quantity on this resource (on this cost item):

Save Configuration to Library Load Configuration from Library Toggle English / Metric OK Cancel

12. Click **OK**.

- Note that the pipe and bedding materials are added to the cost item with their quantities

Row Number		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

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.

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. Press the **Tab** key and it calculates the result.