

QUICK GUIDE

COST ITEM SETUP



◆ CBS OVERVIEW

WBS phase code
 For sharing data with other software.

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

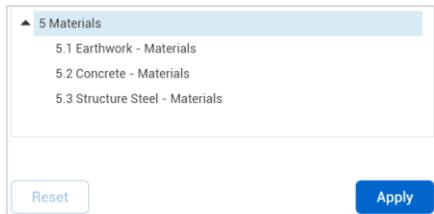
Subordinate
 Child item that has a related parent (superior).

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

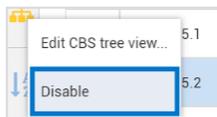
| Tasks | | | | Task details | | |
|--------------------------|--------------|---------------------|----------------|--------------|--------------------|----------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code | Resources | Forecast (T/O) qty | UoM |
| <input type="checkbox"/>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

◆ CBS TREE

1. Click on the icon.
2. Select a cost item and click **Apply** to filter to a cost item and its subordinates.

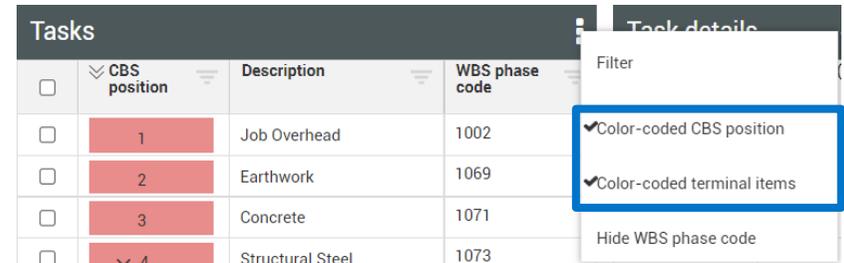


3. To clear the filter, click then select **Disable**.



◆ TURN ON/OFF CBS COLOR-CODING

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



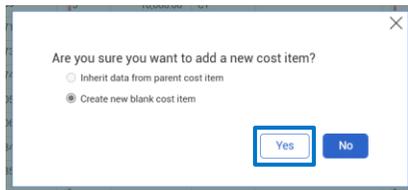
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CREATE A NEW COST ITEM

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



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

MOVE A COST ITEM

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

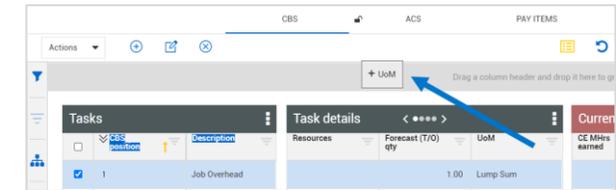


4. Click **Save**.

GROUP COST ITEMS

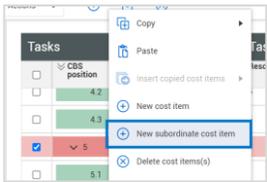
1. From the right toolbar, click on **Group columns**.

2. Drag 1+ column headers into the grey bar area.

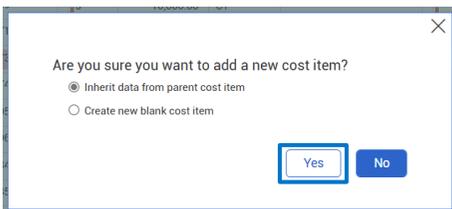


CREATE A SUBORDINATE COST ITEM

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

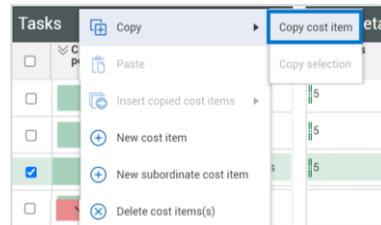


3. Select **Inherit data from parent cost item**, then click **Yes**.

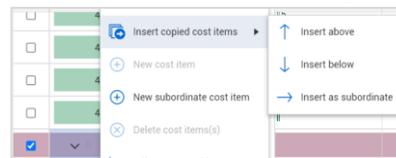


COPY A COST ITEM

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



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



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